

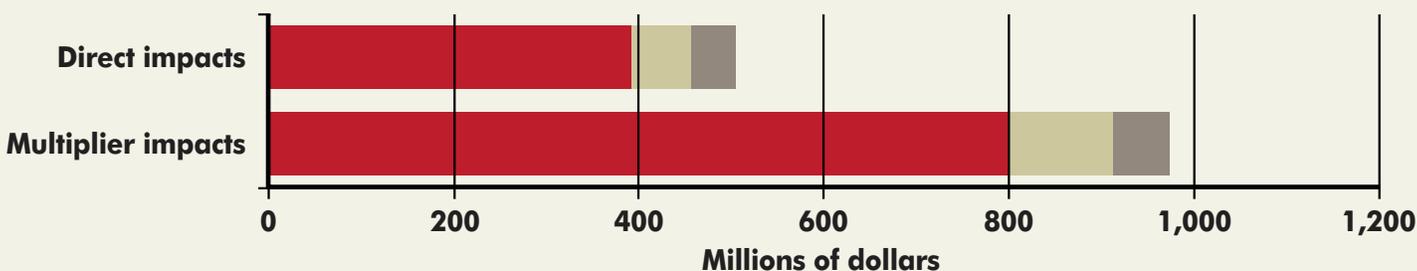


The fishermen of Bristol Bay - one fleet with one future

Economic Report Quantifies the Importance of Our Fishery

Output Value Impacts of the Bristol Bay Salmon Industry, Total US, 2010

- Impacts of fishing & primary processing in Bristol Bay
- Impacts of shipping to other states & secondary processing
- Activity in nationwide distribution & retailing



In 2010, \$1.5 billion in output value was created in the United States in harvesting, processing, and retailing Bristol Bay salmon and the multiplier effects of these activities.

The board recently authorized University of Alaska researchers to study and prepare a report on the impacts of our fishery on the economies of Alaska, West Coast states and the nation. Our reason for developing this report is simple: In order to make truly informed decisions that affect the future of Bristol Bay, state and federal policymakers must understand the tremendous economic benefits provided by our fishery.

The Economic Importance of the Bristol Bay Salmon Industry is a comprehensive report. The Executive Summary alone runs 11 pages; but the messages it conveys are clear. Here are just a few of the key points we will share with reporters, members of Congress and the Administration during a visit to Washington DC in coming days.

- *Bristol Bay is the world's most valuable wild salmon fishery, and typically supplies almost half of the world's wild sockeye. In 2010, harvesting, processing, and retailing Bristol Bay salmon – and the multiplier effects of these activities – created \$1.5 billion in value across the United States.*
- *In 2010, Bristol Bay fishermen harvested 29 million sockeye salmon worth \$165 million in direct harvest value alone.*

- *Processing in Bristol Bay added \$225 million to the harvest value, for a total first wholesale value after processing of \$390 million.*
- *In 2010, the Bristol Bay fishery supported 12,000 fishing and processing jobs during the season. Measuring these as year-round jobs, and adding jobs created in related industries, the Bristol Bay salmon fishery created the equivalent of almost 10,000 year-round American jobs across the country, and brought Americans \$500 million in income.*

Alaska's economy is fueled by both domestic and foreign exports, and the economic importance of the Bristol Bay salmon industry extends far beyond Alaska, particularly to the West Coast states of Washington, Oregon and California. It is important for members of Congress from West Coast states to appreciate the contributions that Bristol Bay fishermen make to their state economies.

- *About one-third of Bristol Bay fishermen and two-thirds of Bristol Bay processing workers live in West Coast states.*
- *Most Bristol Bay processing companies are based in Seattle.*

Economic Report, continued on page 2

- Most of the supplies and services used in fishing and processing are purchased in Washington State.
- Significant secondary processing of Bristol Bay salmon products occurs in Washington and Oregon.



Photo courtesy of Bob Waldrop

The economic importance of the Bristol Bay salmon industry goes well beyond the value, jobs and income created by the fishing and processing which happens in Bristol Bay. More value, jobs and income are created in **downstream**

“In order to make truly informed decisions that affect the future of Bristol Bay, state and federal policymakers must understand the tremendous economic benefits provided by our fishery.”

industries as Bristol Bay salmon are shipped to other states, undergo further processing, and are sold in stores and restaurants across the United States. Still more jobs, income and value are created in other industries through **multiplier impacts** as Bristol Bay fishermen and processors and downstream industries purchase supplies and services, and as their employees spend their income. These are among the messages that we are taking to policymakers in the months to come.

If you're interested in learning more, download the entire report from our website:

[BBRSDA > UPDATES > ECONOMIC IMPORTANCE](#)

BBRSDA Opposes Frankenfish



In February, the BBRSDA provided formal public comment to the Food & Drug Administration concerning the AquaAdvantage® salmon, better known as Frankenfish. We joined with hundreds of other organizations and added your voice to the national debate over genetically engineered salmon. After all, it is fishermen who are most likely to be adversely affected by Frankenfish farming. The entire letter that we submitted is posted on our site, but here are some excerpts.

“The Bristol Bay Regional Seafood Development Association represent more than 1,600 small businesses that comprise the Bristol Bay, Alaska commercial salmon driftnet fleet; proud men and women who are stewards of the largest, most valuable salmon run on the planet. Our commercial fishery has thrived under sustainable management practices for over 130 years, and every one of our members pays federal taxes.

“We strongly oppose the approval of AquaBounty’s genetically engineered, AquaAdvantage® salmon.

“We believe that genetically engineered fish pose serious risks to wild populations and that those risks completely dwarf any alleged benefits that may accrue to consumers through approval of the so-called “Frankenfish.”

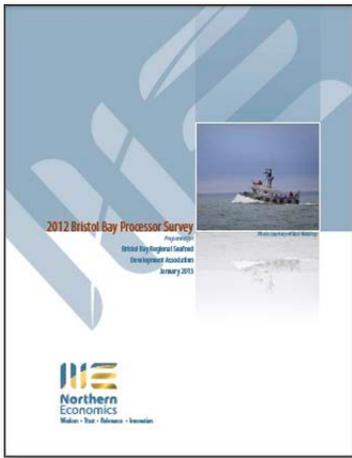
“It is not too late to prevent this mistake from occurring. Bristol Bay’s thriving fishing industry and our members call on the FDA to deny approval to the Frankenfish. Should FDA decide to approve the AquaAdvantage GE salmon despite our opposition, clear, mandatory labeling must be required so that consumers may identify and avoid GE salmon.”

[BBRSDA > UPDATES > BBRSDA OPPOSES FRANKENFISH](#)

The BBRSDA Classifieds currently contain ads for Rawsons and Rozemas, fiberglass service providers, stern rollers and even a King Salmon companion flight. If you have gear to clear out of your locker, a service to provide or you're looking for crew, check out the classifieds.

[BBRSDA > CLASSIFIEDS](#)

Survey Highlights Continued Progress in Quality Improvement



Every year for the past five seasons, the BBRSDA has contracted with a research firm in Anchorage called Northern Economics to produce a comprehensive statistical overview of the previous season. In keeping with the strategic priorities developed by the board in 2008, the annual research effort was first suggested as a way to baseline and then measure progress of the Bristol Bay fleet in “moving the needle” toward becoming a fully-chilled fleet; but it also provides a lot of other information.

The survey captures raw product data, fleet information, current and expected ice production volumes, and processors’ opinions of trends and priorities within the fishery. Operational questions focus on processors’ purchase of chilled product and the distribution of their production among the four major product forms (i.e., canned, Head and Gut (H&G) frozen, H&G fresh, and fillet).

The chilling-related information in particular is important, because “what gets measured gets done.” In other words, we help create a positive feedback loop in the fishery when we quantify and report on the progress of the fleet in improving quality through chilling. Since chilling is the first and most critical step in the economic value chain of any modern salmon fishery, this survey, carried out over years, helps to increase the value of our fishery.

Since you, as a permit holder, help pay for this research, we wanted to share some excerpts from the 2012 report’s Introduction and Summary Conclusions:

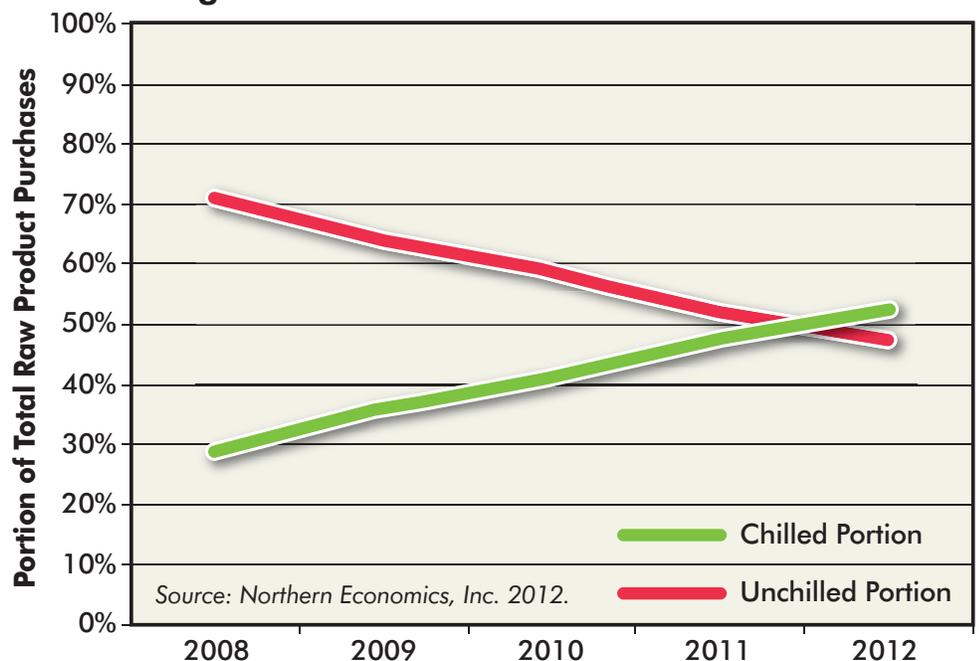
Last year the study found the Bristol Bay drift net fleet chilled 53 percent of its harvest, marking the first year the fleet chilled more than 50 percent of its harvest prior to delivery to processors. **This year the portion of drift harvest that permit holders chilled increased to 59 percent.** Remarkably, the fleet has moved from chilling 24 percent of its harvest in 2008 to 59 percent in 2012; in short, **the fleet more than doubled the portion they chilled in just five seasons.** Also notable this year is the fact that the entire Bristol Bay fishery (i.e., set and drift) is now majority-chilled; the combined fleets chilled 52 percent of the total harvest. In addition to this survey result, we detail below some of the notable changes in the Bristol Bay fishery from 2011 to 2012:

- The total volume of chilled product purchases increased 10 percent in 2012.
- Since 2008, the drift fleet reduced its portion of unchilled product from 76 percent of the harvest to 41 percent of the harvest. This change represents a nearly 54 percent reduction in the portion of the harvest represented by dry, unchilled product.
- As with 2011, this year 80 percent of the drift net chilled product was chilled by permit holders using Refrigerated Sea Water (RSW) systems. Slush ice accounted for the other 20 percent of chilled product. We heard from multiple processors that the easy RSW conversions have taken place and that they are increasingly seeing RSW systems fitted to smaller boats.
- Total ice production capacity of processors and ice barges in Bristol Bay was 918 tons per day. The amount of ice available to permit holders per day was 300 tons, 202 tons of which came from processors and 98 tons of which came from ice barges. The study notes that capacity and usage are not the same. Early data indicate that the ice barges sold just over 500 tons during the season.

There’s a lot more information in the full report, and it’s available on the website.

[BBRSDA > KEY DOCUMENTS > PROCESSOR SURVEYS](#)

Figure 1. Total Chilled and Unchilled Product



ADFG expects a return of 26 million

But forecast range is from 17 to 34 million

A total of 26.03 million sockeye salmon are expected to return to Bristol Bay in 2013. This prediction is 33% lower than the previous 10-year mean of total runs (39.06 million; range of 24.1 million to 46.60 million), and 20% lower than the long-term mean of 32.38 million. The forecast range is from 17.30 million to 34.76 million. All systems are expected to meet their spawning escapement goals.

A run of 26.03 million sockeye salmon can potentially produce a total harvest of 17.53 million fish if escapement goals are met for managed stocks and industry is capable of taking the surplus fish. The projected harvest includes 16.59 million fish in Bristol Bay and 0.94 million fish in the South Peninsula fisheries. A Bristol Bay harvest of 16.59 million would be 40% lower than the previous 10-year mean harvest (27.63 million; range of 17.22 million to 32.01 million), and 20% lower than the long-term mean of 20.67 million.

The run forecast to each district and river system is as follows:

- 10.61 million to Naknek- Kvichak District (5.08 million to Kvichak River; 2.08 million to Alagnak River; 3.46 million to Naknek River);
- 6.06 million to Egegik District;
- 3.53 million to Ugashik District;
- 5.25 million to Nushagak District (3.42 million to Wood River; 1.31 million to Nushagak River; 0.52 million to Igushik River); and
- 0.59 million to Togiak District.

BRSDA > KEY DOCUMENTS > 2013 BRISTOL BAY

Pebble Update



Photo courtesy of Bob Waldrop

On February 5th, the Environmental Protection Agency announced it would conduct a second review of its draft Bristol Bay Watershed Assessment with a peer review follow-up in spring 2013. With this added delay, EPA said it would finalize the report sometime this year.

In a news release following the EPA announcement, Executive Director Bob Waldrop commented on the disappointing delay: "Three years ago today, commercial fishermen, Alaska Native tribes, and sport fishermen asked the Obama Administration to protect the world's greatest sockeye salmon fishery and the 14,000¹ jobs it sustains from the threats of mega mining. We did not ask for years of study and process."

We had hoped to see EPA's Bristol Bay Watershed Assessment finalized by early 2013, at which point the Administration could take the next step and use its 404(c) power under the Clean Water Act to place commonsense restrictions on inappropriately large-scale development such as the Pebble Mine.

Next up is another trip to DC, to encourage release of the updated draft Bristol Bay watershed assessment by March 19th. Along with Bob Waldrop, a team of fishermen will urge the White House, EPA and members of Congress to ensure a prompt release of the assessment so fishermen can make individual public comments prior to the fishing season. Stand by for more on that!

¹This figure includes commercial, subsistence and recreational salmon-related jobs.

Commercial Fishermen for Bristol Bay (in New England)



Rhode Island industry stands strong for Bristol Bay. Shown above are (L to R) Timothy Caldwell, F/V Griswald, Eddie Coughlin, F/V Stormy Elizabeth, Sarah Schumann, F/V Nushagak, Jon Knight, Superior Trawl and Fred Montera, Northeast Safety Training Co.

FISHERMENFORBRISTOL BAY.ORG

Last month, Bristol Bay fisherman and BBRSDA board member Katherine Carscadden met with New England fishermen to collaborate on how best to defend Bristol Bay's thousands of jobs and \$800 million industry. Katherine hosted several public events and meetings with partner fishing groups, as well as political leaders across New England. Meetings included samples of Bristol Bay sockeye and panel discussions with local fishermen and chefs. Katherine's visit to New England raised awareness about our fishery and the Pebble Mine by generating stories in Maine, Massachusetts and Rhode Island newspapers.

BBRSDA members, please pay particular attention to both the final watershed assessment and the next public comment period, expected in 2-4 weeks. Keep your eyes on both *Bristol Bay Waypoints* and EPA announcements for the most effective ways to make your voice heard.

Bristol Bay

Bristol Bay fishermen who want to track EPA's progress in Bristol Bay should go to their BB-specific website - just Google "EPA Bristol Bay" - and then sign up for their mailing list.

Project Summary

The EPA released for public review a draft assessment of the potential environmental impacts of the Pebble Mine project in the watershed from a number of perspectives. This assessment will lead to a better understanding of potential environmental impacts and will lead to a better understanding of potential environmental impacts. Under the Clean Water Act, EPA has the authority and responsibility to protect the nation's water and perform scientific studies that enhance the agency's and the public's knowledge of water resources. EPA's focus in the assessment is scientific and technical; the agency has made no judgments about the use of its regulatory authority under the Clean Water Act and the draft study in no way precludes future consideration of proposed mining activities.

Contact Us

Questions? For more information, email us at rl0@bristolbay.epa.gov

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- Richard Parvin (parvin.richard@epa.gov), Management Lead, 206-553-6574

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Board Approves Projects for Funding

Wide variety of projects will advance marketing, quality, research and sustainability strategies

At their March meeting, the board approved \$631,100 in funding for projects that advance the BBRSDA's strategic priorities. Here is a snapshot of those projects. Prior to the season we will update our more-detailed Project Report, which is always available on the website.

KDLG: \$25,000

Funds will help support hiring of a summer reporter to focus and expand coverage of Bristol Bay fisheries including interviews with industry, ADFG, scientists and fishermen. Funding ensures production and airing of the Bristol Bay Fisheries Report throughout the season. These funds will also support an increase in KDLG's transmitter power for the summer from 1,000 watts to 10,000 watts in the midnight to 6 AM timeslot.

Chef's Collaborative: \$40,000

A continuation of last year's successful partnership with Chef's Collaborative, the nation's largest network of sustainability-focused chefs. Funds support a variety of events and activities that focus attention of chefs, food writers, institutional seafood buyers and retail seafood consumers on the amazing quality and sustainability of Bristol Bay salmon.

Slurry Ice Pilot Project: \$62,000

Cost-share pilot project will assess the technology and benefits for fishermen of slurry ice-generating machines, a chilling technology said to improve and extend freshness of product over longer periods. Equipment to be placed aboard tenders, fishing vessels and/or dockside, TBD.



Photo courtesy of Bob Waldrop

Bristol Lady Ice Barge: \$50,000

Support for operation of the Bristol Lady ice barge in the Naknek district, with emphasis on stimulating higher volumes of ice sales to a larger pool of fishermen. \$50,000 project amount is a maximum figure; actual amount of BBRSDA contribution will be based on a sales-based formula defined in the project contract.

Bristol Maid Ice Barge: \$50,000

Support for operation of the Bristol Maid ice barge in the Nushagak district, with emphasis on stimulating higher volumes of ice sales to a larger pool of fishermen. \$50,000 project amount is a maximum figure; actual amount of BBRSDA contribution will be based on a sales-based formula defined in the project contract.



Photo courtesy of Bob Waldrop

Bristol Bay Land Trust Headwater Studies: \$30,000

This funding will support ongoing baseline data collection and monitoring of headwater streams in the Upper Nushagak and Kvichak watersheds. This information allows scientists to understand current conditions, distinguish environmental changes over time, and predict potential impacts of human-induced conditions such as large-scale mineral development.

Bristol Bay Land Trust Stream Temperature Monitoring: \$15,000

Funding will help to develop a stream temperature-monitoring plan; train local monitors; and build the science-based knowledge needed to identify thermal impacts in salmon spawning and rearing habitat.

Port Moller Test Fishery: \$40,000

A perennial cost-share project of the BBRSDA and our partners, the Port Moller Test Fishery provides valuable information to the Bristol Bay fleet and processors during the fishing season.

Escapement Goals and Economics (UW/FRI): \$56,000

This is a placeholder project which will only be implemented if requested by a multi-stakeholder committee established at the recent Board of Fish meeting. That committee is tasked with looking at a broad range of pros and cons concerning the questions of how (and whether) to adjust escapement goals. One aspect of that overall consideration has to do with socio-economic implications of such adjustments. This funding is set aside in order to carry out that research if needed and requested.

Kvichak Spawning Assessment (UW/FRI): \$190,000

This study will develop baseline information about the spawning habitat of Lake Iliamna, and investigate potential environmental and economic impacts of non-fishing activities in and around the eastern portion of the lake, such as roads, bridges and associated infrastructure.

Project Funds, continued on page 6

BRISTOL BAY



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So go to bbrsda.com and look for this.



Stay Informed

All members and friends, please sign up to receive Bristol Bay Waypoints for timely updates on matters that directly affect our fishery.

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Photo courtesy of Bob Waldrop

Project Funds, continued from page 5

Documentary Film (Elijah Lawson): \$33,100

Production of a series of attractive short videos profiling fishing families of Bristol Bay, to generate exposure of Bristol Bay salmon, the "Bristol Bay brand" and the fleet as a whole.

Savor Bristol Bay: \$40,000

Continuing our partnership with Savor Bristol Bay from past years, this project will support a broad range of awareness campaigns, including: Bristol Bay sockeye restaurant promotions; celebrity chefs outreach and engagement; retail outreach programs; and high-visibility marketing and awareness for Bristol Bay sockeye at national chef & seafood conferences.