

# C.5 – SABLEFISH GEAR SWITCHING ROA

***West Coast Shoreside***

***Processing Perspective***

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**West Coast Seafood Processors Association**

# CURRENT CAPACITY

West Coast Shoreside Processing of

## IFQ Groundfish

- 10 shoreside groundfish processing facilities (2 in Newport, 2 in Charleston)
  - 6 facilities – significant capacity
  - 4 facilities – “smaller” plants

*Also, some limited groundfish processing in Half Moon Bay*

Westport

Ilwaco

Warrenton

Astoria

Newport

Charleston

Eureka

Fort Bragg

Half Moon Bay\*



# FUTURE POTENTIAL

West Coast Shoreside Processing of

# IFQ Groundfish

- Potential to expand to 13 shoreside groundfish processing facilities  
(2 in Newport, Astoria, and Charleston)
  - 8 facilities – potential for significant processing capacity
  - 5 facilities – “smaller” plants

*Some limited groundfish processing assumed to continue in Half Moon Bay*



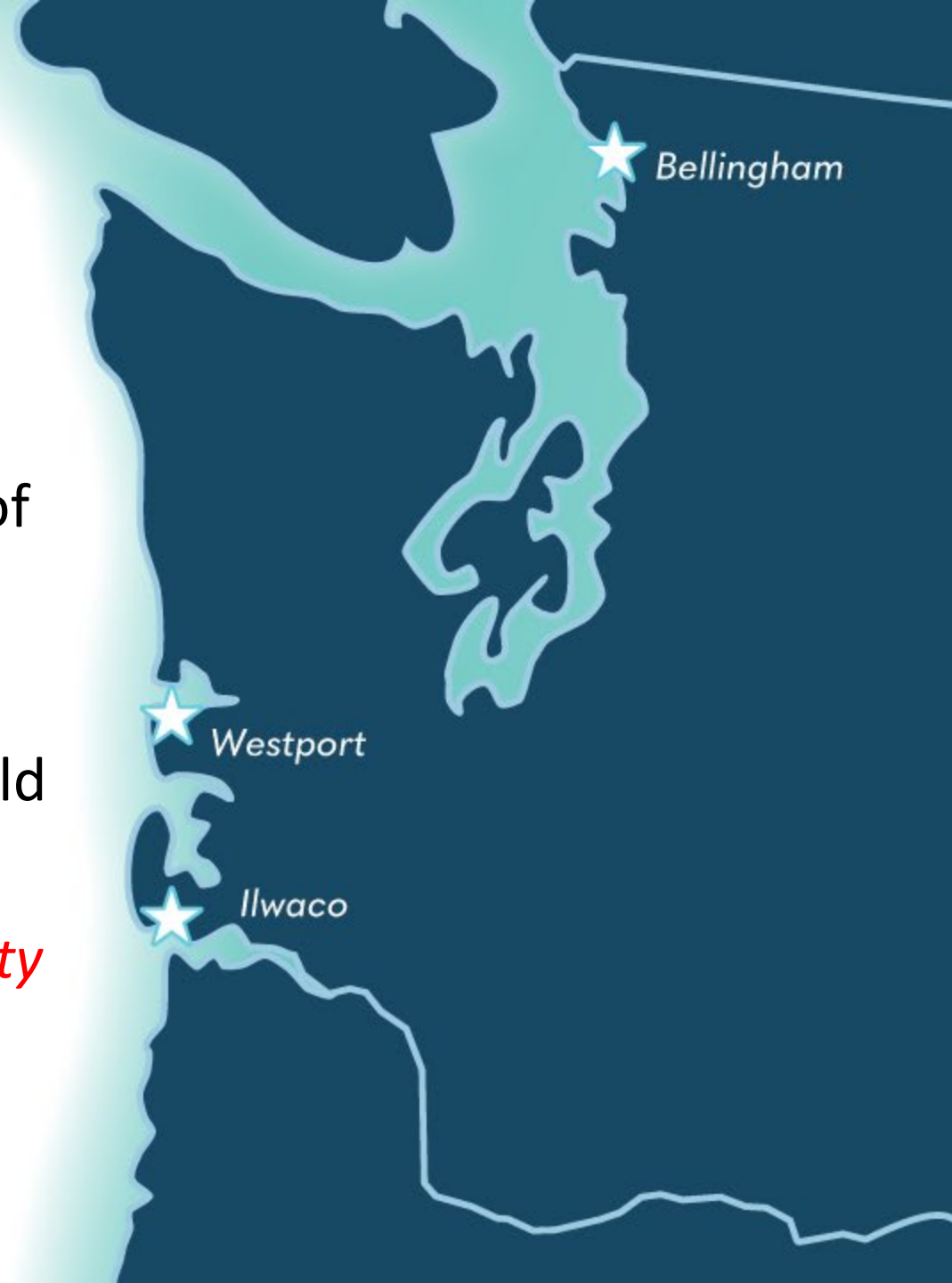
# WASHINGTON

West Coast Shoreside Processing of

## IFQ Groundfish

- Significant potential to process high volumes of groundfish year-round in Westport and Ilwaco
- Bellingham facility not likely to process high volumes of groundfish – but it did – and it could

*Year-round Groundfish Processing = Year-round  
Employment Opportunities = Infrastructure Stability  
= More Opportunities in Other Fisheries*



# OREGON

West Coast Shoreside Processing of

## IFQ Groundfish

- Significant potential to process high volumes of groundfish year-round in Astoria, Warrenton, and Newport (5 facilities)
- Two “smaller” facilities in Charleston with potential to process groundfish year-round

*There is more groundfish processing capacity in Oregon than in any other West Coast state.*

Warrenton

Astoria

Newport

Charleston



# CALIFORNIA

West Coast Shoreside Processing of

## IFQ Groundfish

- Significant potential to process high volumes of groundfish year-round in Eureka
- “Smaller” facility in Ft. Bragg (year-round)
- “Smaller” facility may be emerging in Crescent City
- Limited groundfish processing in Half Moon Bay

*There are only 2 groundfish processing facilities remaining in CA – If any more are lost, they will not be regained.*



# Year-round Groundfish Processing Relies on Dover Sole

*A high volume of Dover sole is needed to “get the fish out of the water.”*

	Trawl Sector Dover Allocation (QP)	Trawl Sector Dover Catch	% Dover Attained	Total Non-Whiting Groundfish Catch
2018	111,064,314	<b>14,050,212</b>	12.7%	<b>66,244,119</b>
2019	110,261,541	<b>12,735,662</b>	11.6%	<b>64,026,774</b>
2020	110,631,155	<b>10,415,534</b>	9.4%	<b>55,936,623</b>

*Increasing Dover attainment will increase overall groundfish attainment.*

# Why is Groundfish Automation Necessary?

- Provides a much-needed supplement to current workforce
- Supports high-volume processing, which is a necessary “backbone” to provide stability to the groundfish fishery
- Increases opportunities for skilled labor – automation *will not* replace our workforce
- Provides opportunity for skilled filleters to be utilized in seasonal fisheries and for specialty products – increases processing diversity and enhances overall business portfolio

*Skilled labor is also needed to operate filleting machines.*



# AUTOMATING

West Coast Shoreside Processing of  
IFQ Groundfish



# Groundfish Automation – How Much Does it Cost?

- **2 machines needed for Dover/flatfish automation (~\$5 million+)**
- No specific machine for West Coast rockfish at this time
  - *Rockfish automation needs more R&D, but R&D needs commitments to purchase multiple machines*
  - *Some plants trying to retro-fit other machines to automate rockfish filleting (~\$1.5 million+)*

Assuming 2-3 automated “setups” for Dover sole per facility =  
~\$10-\$15 million+ investment per facility

# Dover Sole Automation – What’s the Potential?

- **Maximum of 8 processing facilities with potential for Dover automation**
  - *~\$5+ million+ per “setup” = ~\$40 million+ investment (minimum)*
- **Potential to process upwards of 70,000 pounds of Dover in 24 hours**
  - *Two shifts operating full-time with one automation setup*
- **Year-round processing potential = ~25.5 million pounds per facility**
  - *8 facilities full-time, year-round = 204,400,000 pounds Dover sole*
  - *More realistically, 3-4 facilities = 76 million-102 million pounds Dover sole*

**A significant amount of volume is necessary to achieve the ROI, but....**

**We CAN achieve OY for this fishery if we automate.**

# Gear Switching Range of Alternatives

- Apply the “certainty-based cap” approach rather than approximating expected “projected” maximums
- Analyze certainty-based caps of 10%, 20%, and 29% for all alts
- Make it simple – Keep trawl-allocated sablefish in the trawl sector
- Include Trawl Stakeholder Alternative 2 in ROA
- Prioritize the need to achieve OY for the groundfish fishery (enhancing food security and long-term viability of the fishery)

*Focus on preserving our remaining groundfish infrastructure.*