

ECONOMIC STATUS OF THE WASHINGTON, OREGON, AND CALIFORNIA
GROUND FISH FISHERIES

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ECONOMIC STATUS OF THE FISHERY IN 1990

The following tables present statistics on annual landings, exvessel values, and fishing vessel fleet size for the commercial groundfish fisheries off Washington, Oregon, and California from 1980 through 1990. Several different user groups harvest these groundfish resources: domestic commercial fishing vessels that deploy trawl nets, fish pots, longlines, hook-and-lines, set nets and other assorted gears; U.S. catcher vessels operating in joint ventures; foreign floating processing vessels operating in joint ventures; recreational fishermen; and, for the first time, U.S. catcher-processor vessels harvesting Pacific whiting. The harvesting sector is linked to an extensive industry that processes and markets groundfish products in many different forms for domestic and/or foreign consumption, including domestic shore-based processors, domestic floating processors, and foreign floating processors.

Data on landings, exvessel values, and fleet size were supplied or compiled from state agency reports, Pacific Coast Fishery Information Network (PacFIN) tabular statistics, or data files obtained from the PacFIN research database. Changes in the economic condition of the fishery between 1989 and 1990 are reviewed. The fleet's economic performance is described in terms of gross revenues accruing from all marine fish landed in West Coast ports and in joint venture fisheries. The economic condition of the processing and market sectors can be evaluated in general terms from data presented on value of domestic processed groundfish products.

The shore-based sector of the West Coast groundfish fishery experienced a reduction in landings from 1989 to 1990, with landings totaling 97,801 mt. Joint venture Pacific whiting landings also decreased 12.5 percent from the peak of 1989, totaling 171,365 mt. As a result the total commercial landed catch declined to 269,166 mt, a reduction of 8.8 percent from the 1989 fishing year. The exvessel value of the total commercial landed catch was \$83 million (current dollars) or 7.6 percent lower than in 1989. The exvessel value of shoreside and joint venture landings decreased 6.1 percent (current value) and 12.5 percent, respectively.

Shoreside groundfish landings for most species/species groups were somewhat lower in 1990. The largest declines were for Pacific cod (-51.2 percent), Pacific ocean perch (-29.2 percent) and the other rockfish category. Although there were substantial increases in landings of Pacific whiting and thornyheads, these did not make up for the deficit from the other species. There were also minor increases of unspecified rockfish and other flatfish.

Landings declined generally for all gear groups, with trawl declining 9.3 percent, pot declining 24.5 percent, longline 3.3 percent; and set and trammel nets .2 percent. Exvessel value also declined for all groups except longline and set net: trawl down \$5 million (-10 percent), pot down \$628,000 (-27 percent), longline up \$143,000 (+2 percent), set net up \$1 million (+61 percent); The combined exvessel value of longline and pot declined \$485,000 (-5 percent).

Table 1. Quantity and exvessel value of groundfish landings in Washington, Oregon, and California, including joint venture deliveries in waters off these states, 1989-90.

	1989	1990	% change
Shoreside (mt)	99,261	97,801	-1.5
Joint Venture (mt) ¹	195,809	171,365	-12.5
Total WOC Landings	295,070	269,166	-8.8
Shoreside Value (\$)			
Current	68,757,000	64,590,000	-6.1
Real ²	61,943,000	55,874,000	-9.8
Joint Venture Value (\$)			
Current	21,105,000	18,474,000	-12.5
Real ²	19,014,000	15,981,000	-16.0
Total WOC Groundfish Landed Value			
Current	89,862,000	83,064,000	-7.6
Real ²	80,957,000	71,855,000	-11.2

Sources: Pacific Coast Fishery Information Network (PacFIN) Groundfish Report Series, preliminary data, October 1991; NMFS, Northwest Regional Office.

- 1/ Includes all groundfish retained by foreign processors after landings by U.S. vessels. Does not include whiting that are landed but eventually discarded. Discarded whiting landings totaled 3,532 mt in 1989 and 1,067 mt in 1990.
- 2/ Real values are current values adjusted to eliminate the effects of inflation. This adjustment has been made by dividing current values by the current year GNP implicit price deflator, with a base year of 1986. The GNP deflators are 1.110 in 1989 and 1.156 in 1990.

Table 2. Average annual exvessel prices paid for some commercially important species, 1980-1990.

	Sablefish		All Rockfish Combined		Widow Rockfish		Dover Sole		English Sole		Petrale Sole	
	<u>Nominal</u>	<u>Real</u>	<u>Nominal</u>	<u>Real</u>	<u>Nominal</u>	<u>Real</u>	<u>Nominal</u>	<u>Real</u>	<u>Nominal</u>	<u>Real</u>	<u>Nominal</u>	<u>Real</u>
1980	.199	.265	.159	.212	-	-	.211	.281	.328	.437	.458	.611
1981	.215	.262	.169	.206	.135	.164	.223	.270	.297	.362	.512	.624
1982	.252	.289	.195	.224	.157	.180	.233	.267	.318	.365	.606	.696
1983	.237	.262	.223	.246	.192	.212	.224	.247	.322	.356	.682	.755
1984	.218	.232	.251	.267	.225	.240	.231	.246	.321	.343	.709	.755
1985	.334	.343	.281	.289	.250	.257	.240	.246	.333	.342	.736	.756
1986	.374	.374	.313	.313	.275	.275	.258	.258	.360	.360	.777	.777
1987	.472	.461	.350	.343	.322	.314	.305	.298	.402	.393	.816	.797
1988	.525	.496	.323	.305	.286	.270	.304	.287	.392	.370	.816	.771
1989	.476	.433	.319	.290	.258	.235	.275	.261	.365	.332	.816	.735
1990	.480	.415	.338	.292	.262	.227	.268	.232	.328	.284	.825	.714

Source: PacFIN, Groundfish Report Series, October 1991.
State Fishery Agencies.

Note: Real prices were adjusted for inflation using the GNP implicit price deflator, where 1986=1.00. All prices are weighted averages.

Table 3. Washington, Oregon, and California shoreside commercial landings (metric tons) and exvessel value (thousands of dollars), 1980-1990.

<u>Year</u>	<u>California</u>		<u>Oregon</u>		<u>Washington</u>		<u>Total Coast</u>	
	mt	\$	mt	\$	mt	\$		
1980	36,862	16,551	28,515	11,425	22,514	9,119	87,891	37,095
1981	42,578	21,448	37,502	14,721	23,093	10,100	103,173	46,269
1982	52,608	27,795	41,023	20,445	25,368	11,405	118,999	59,645
1983	39,498	21,984	35,158	18,345	22,970	11,257	97,626	51,586
1984	40,570	22,914	28,209	15,234	21,080	10,474	89,859	48,622
1985	43,062	26,516	29,023	17,095	19,229	12,449	91,314	56,060
1986	41,246	28,552	24,931	16,813	16,081	10,905	82,298	56,240
1987	41,410	30,682	30,626	24,328	20,292	16,872	92,329	71,881
1988	39,420	28,213	31,845	23,748	20,371	15,686	91,635	67,646
1989	42,315	29,951	36,843	25,218	20,103	13,589	99,261	68,757
1990	39,149	28,919	35,514	23,343	18,403	11,538	97,801	64,590

Source: PacFIN, Groundfish Report Series, October 1991.
State Fishery Agencies

Table 4. Commercial landings (mt) of individual groundfish species by state, 1989-1990.

Species	California		Oregon		Washington	
	1989	1990	1989	1990	1989	1990
Lingcod	1,266	1,064	1,175	874	1,137	994
Pacific Cod	-	-	780	232	1,403	833
Pacific Whiting	7,298	5,519	89	2,294	27	302
Sablefish	3,953	3,648	3,948	3,705	2,417	1,724
Pacific Ocean Perch	10	6	948	577	431	382
Widow Rockfish	1,711	2,002	6,974	5,571	4,180	2,981
Other Rockfish	16,503	17,307	10,479	10,827	3,941	3,597
Dover Sole	7,724	6,320	8,908	7,509	2,183	1,869
English Sole	1,053	892	693	509	662	512
Petrale Sole	841	678	863	744	450	342
Other Flatfish	1,708	1,431	1,918	2,565	2,891	4,323

Source: PacFIN, Groundfish Report Series, October 1991.

Table 5. Landings and exvessel value (thousands of dollars) of individual groundfish species landed in Washington, Oregon, and California, 1989-1990.¹

Species	1989		1990		% change	
	mt	\$	mt	\$	mt	\$
Lingcod	3,578	2,767	2,932	2,286	-18.1	-17.4
Pacific Cod	2,184	1,246	1,065	635	-51.2	-49.0
Pacific Whiting	7,414	1,077	12,828	1,841	+73.0	+70.9
Sablefish	10,317	10,718	9,078	9,616	-12.0	-10.3
Pacific Ocean Perch	1,390	832	984	586	-29.2	-29.6
Widow Rockfish	12,865	7,326	10,554	6,090	-18.0	-16.9
Thornyheads	7,925	6,470	10,126	8,616	+27.8	+33.2
Other Rockfish	1,803	1,383	958	749	-46.9	-45.8
Unspecified Rockfish	10,695	9,628	11,614	10,615	+8.6	+10.3
Dover Sole	18,815	11,396	15,698	9,281	-16.6	-18.6
English Sole	2,408	1,939	1,913	1,381	-20.6	-28.8
Petrale Sole	2,153	3,873	1,765	3,211	-18.0	-17.1
Other Flatfish	1,206	1,182	1,247	1,165	+3.4	-1.4

Source: PacFIN, Groundfish Report Series, October 1991.

1/ Includes domestic landings from U.S. coastal waters off WOC, but not Puget Sound; A small amount of landings of miscellaneous groundfish species is not included in the totals.

Table 6. Washington, Oregon, and California combined landings and exvessel value (thousands of dollars) of sablefish by gear, 1989-1990.¹

	<u>1989</u>		<u>1990</u>	
	mt	\$	mt	\$
Groundfish Trawl	5660 (54.9)	4557 (42.5)	5039 (55.1)	4009 (41.7)
Fish Pot	1924 (18.6)	2164 (20.2)	1472 (16.1)	1613 (16.8)
Longline/netline ²	2565 (24.9)	3885 (36.2)	2164 (23.7)	3626 (37.7)
Other groundfish net	104 (1.0)	60 (0.6)	62 (0.7)	40 (0.4)
Other	65 (0.6)	52 (0.5)	402 (4.4)	328 (3.4)
Total	10,318	10,718	9,139	9,616

Source: PacFIN, Groundfish Report Series, October 1991.

1/ Figures in parentheses are the percentages each gear group contributed to the total landed catch or exvessel value.

2/ Includes California commercial pole-and-line gear.

Table 7. West Coast groundfish shoreside landings (metric tons) by gear group, 1981-1990.

	Trawl	Trap/ Pot	Setline ¹ / Longline	Gill/Set ² Net	Other/Misc.
1981	90,797	3,956	3,997	1,632	2,791
1982	103,299	6,530	4,384	2,077	2,709
1983	81,668	5,423	2,191	2,243	6,101
1984	72,693	3,854	1,989	2,199	9,124
1985	75,352	3,703	4,603	3,918	3,737
1986	61,249	2,216	5,894	4,205	8,734
1987	74,719	2,076	6,952	3,903	4,740
1988	73,460	2,186	5,679	2,864	7,487
1989	84,421	2,002	5,962	2,965	3,911
1990	78,793	1,512	5,766	2,894	4,101

Source: PacFIN, Groundfish Report Series, October 1991.

- 1/ Includes commercial pole catch for California landings, because large quantities of sablefish and rockfish are landed with this gear in PacFIN.
- 2/ Includes gill net, set net, and other net; but not dip, trammel, seine, or miscellaneous nets.

Table 8. Exvessel value (thousands of dollars) of West Coast groundfish landings by gear group, 1981-1990.

	Trawl	Trap/ Pot	Setline ¹ / Longline	Gill/Set ² Net	Other/Misc.
1981	37,855	2,081	3,696	1,468	2,169
1982	46,987	4,863	4,551	1,814	1,430
1983	40,987	3,598	2,091	1,742	3,578
1984	36,885	2,338	2,083	1,955	5,361
1985	41,264	3,154	5,329	3,367	2,946
1986	36,916	2,171	6,811	3,715	6,627
1987	52,162	2,347	9,527	3,806	4,032
1988	48,010	2,797	8,573	2,709	3,928
1989	52,576	2,285	8,265	1,723	2,909
1990	47,476	1,657	8,408	2,775	3,484

Source: PacFIN, Groundfish Report Series, October 1991.

1/ Includes commercial pole catch for California landings, because large quantities of sablefish and rockfish are landed with this gear as reported in PacFIN.

2/ Includes gill net, set net, and other net; but not dip, trammel, seine, or miscellaneous.