

The Wheel Watch

a newsletter of the

Fishing Vessel Owners' Association
 Room 232, West Wall Bldg., 4005 - 20th Ave. West
 Seattle, WA 98199-1290
 Phone: (206) 284-4720 / 283-7735
 Fax: (206) 283-3341
 Website: www.fvoa.org

Robert D. Alverson
 Manager

Katie Harris
 Executive Assistant

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Dear Members,

This newsletter will bring you up to date on actions at the North Pacific Fishery Management Council, Halibut Commission, Pacific Council, Washington, D.C., and market insight for 2021.

****NPFMC****

The Council adopted the following 2021 allowable biological catch (ABC) and total allowable catch TAC limits for sablefish:

Area	2020 ABC	TAC	Catch	2021 ABC	TAC	Catch
Aleutians	2952 MT	2039 MT	1123 MT	4717 MT	4717 MT	Up 131%
Bering Sea	2174 MT	1861 MT	5184 MT	3396 MT	3396 MT	Up 82%

There was considerable discussion about the trawl overages in the Bering Sea. The Council asked the staff to look at options to address these overages. I am doubtful timely action will be taken on this issue. In the Bering Sea the fixed gear allocation is 50% and the trawlers get 50%. Last year the fixed gear took 22% of their harvest in the Aleutians, the rest was trawl bycatch. In the Bering Sea the trawlers landed their allocation plus discarded 7-8 million pounds of sablefish. According to NMFS 1383 MT were discarded at sea and 1455 MT were discarded at the plants.

Gulf of Alaska	2020 ABC	TAC	Catch	2021 ABC	TAC	Catch
WG	2278 MT	1942 MT	1424 MT	3224 MT	2428 MT	Up 25%
C	7560 MT	6445 MT	5846 MT	9527 MT	8056 MT	Up 25%
WYAK	2521 MT	2343 MT	1789 MT	3451 MT	2929 MT	Up 25%
SEO	4521 MT	3663 MT	3036 MT	5273 MT	9579 MT	Up 25%
Total GOA	16,883 MT	14,393 MT	12,095 MT	21,475 MT	17,991 MT	Up 25%

****The GOA****

The Council did not increase the ABC or the TAC as much as they could have for sablefish. There were concerns from the stock assessment authors that the 2014 year class had been down-graded 68% since it was originally seen in the survey and the 2016 year class had been down-graded 30% since it was first seen in the survey. Additionally, they were concerned about the lack of older larger spawners. By not taking the full increase they hope to allow more of the 2014 and 2016 year's class's to fill in as spawners. They could have approved a 100% increase over 2020.

The stock assessment authors point out that even with the downgrade of the 2014 and 2016 year classes, they are still larger than anything seen since 1976. Additionally, there may be a 2017 and 2019 year class both well above average. The TAC in the next two years could exceed 50,000 MT state wide or 100 million pounds.

Below are some of the statistics and graphics from the stock assessment author's 2020 analysis. Most are very positive for the future of sablefish. Biomass is increasing in all areas.

Table 3.14. Estimates of sablefish recruits (Age-2), total biomass (2+), and spawning biomass from the Base model (MLE mean) along with lower and upper lower 95% credible intervals (2.5%, 97.5%) from MCMC. Recruits are in millions and biomass is in kt. The estimate for the 2018 year class (terminal year 2020 recruitment event) is omitted, because it is fixed to the estimated mean recruitment value (μ_r) with no deviation parameter estimated.

Year	Recruits (Age-2; millions)			Total Biomass (kt)			Spawning Biomass (kt)		
	Mean	2.5%	97.5%	Mean	2.5%	97.5%	Mean	2.5%	97.5%
2008	8.0	4.9	12.1	237.2	205.3	300.6	97.4	84.0	124.3
2009	6.8	4.6	10.4	225.6	195.4	286.1	95.5	82.5	121.5
2010	16.0	12.4	22.4	223.7	193.9	284.0	92.6	80.1	117.7
2011	4.4	1.9	7.7	215.1	186.0	272.4	89.2	77.0	113.1
2012	8.5	6.2	12.4	207.4	179.3	262.4	85.1	73.3	107.8
2013	0.9	0.2	2.3	191.5	165.1	242.4	80.7	69.3	102.5
2014	6.1	4.0	9.3	178.1	153.0	226.6	76.7	65.6	97.9
2015	9.9	7.3	14.4	170.8	145.9	218.2	73.4	62.5	94.0
2016	67.7	55.6	91.5	220.5	188.0	285.1	69.6	58.8	89.3
2017	26.6	18.0	40.3	256.2	218.2	332.5	66.2	55.7	85.4
2018	163.7	130.2	224.8	420.7	355.0	549.9	65.4	54.8	85.0
2019	123.4	91.6	178.4	596.7	501.7	781.2	73.1	61.3	94.9
2020				686.9	576.6	893.6	94.4	79.8	122.0

Table 3.15. Regional estimates of sablefish total biomass (Age 2+, kilotons). Partitioning was done using RPWs from Japanese LL survey from 1979-1989 and domestic LL survey from 1990-2020 using a 2 year moving average. For 1960-1978, a prospective 4:6:9 - year average of forward proportions was used.

Year	Bering Sea	Aleutian Islands	Western GOA	Central GOA	West Yakutat	EYakutat/Southeast	Total Alaska
2008	46	30	23	74	23	41	237
2009	43	29	26	71	20	36	226
2010	44	25	23	65	25	41	224
2011	28	22	22	76	28	40	215
2012	11	27	24	83	23	39	207
2013	25	27	20	64	17	39	192
2014	37	22	19	50	15	33	178
2015	29	23	19	49	19	32	171
2016	27	39	24	63	29	39	221
2017	32	53	30	73	30	38	256
2018	53	100	54	120	38	56	421
2019	97	127	66	118	37	67	512
2020	158	169	77	157	43	82	687

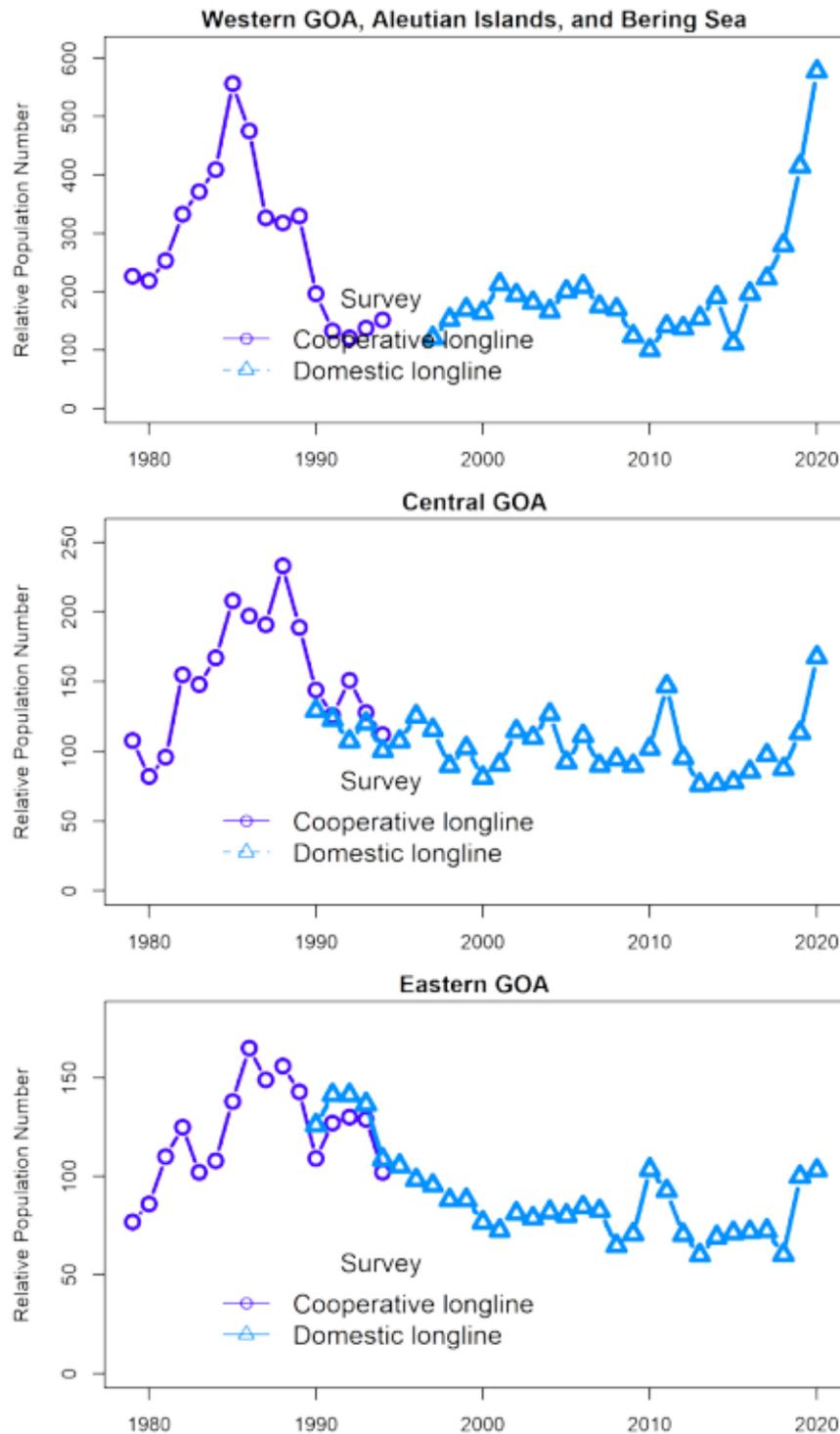


Figure 3.7. Relative abundance (numbers) by region and survey. The regions Bering Sea, Aleutians Islands, and western Gulf of Alaska are combined in the first panel. The two surveys are the Japan-U.S. cooperative longline survey and the domestic (U.S.) longline survey. The values for the U.S. survey were adjusted to account for the higher efficiency of the U.S. survey gear.

This chart shows in dark blue what a year class was predicted to be and the yellow bar is where it ended up. As you can see they show strong year classes for 2014, 2016, and 2017. Note that 2014 and 2016 show a decrease from when they were first seen in the survey while the 2017 year class was barely average when first seen and is now predicted to be very large.

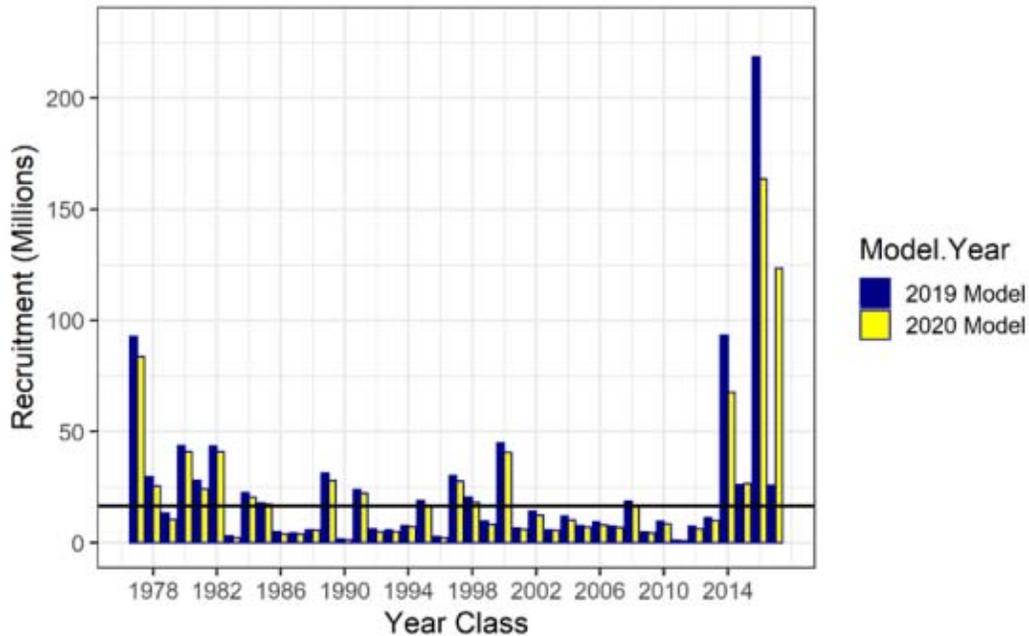


Figure 3.18a. Estimated recruitment by year class (1977-2017) in number of age-2 fish (millions of fish) for the 2019 and 2020 models. Black line is mean recruitment from the 2020 model for 1977 to 2017 yearclasses. Note that the 2017 yearclass for the 2019 model is equivalent to the estimated mean recruitment value (μ_r) given that no recruit deviation is estimated in the terminal year.

Please note above, table 3.15 that estimated biomass increases are larger as you move westward. Yakutat and S.E. Alaska are only now beginning to see increases. The migration pattern in the past tracks new year classes first being seen in large numbers in the Western areas and with each new year they migrate back into the Gulf towards to the East.

Below is a chart of the CPUE from the 2020 and 2019 longline survey. This shows where there were increases and decreases year over year. The western areas are showing the first increases as the juvenile sablefish mature and mitigate eastward in the Gulf of Alaska.

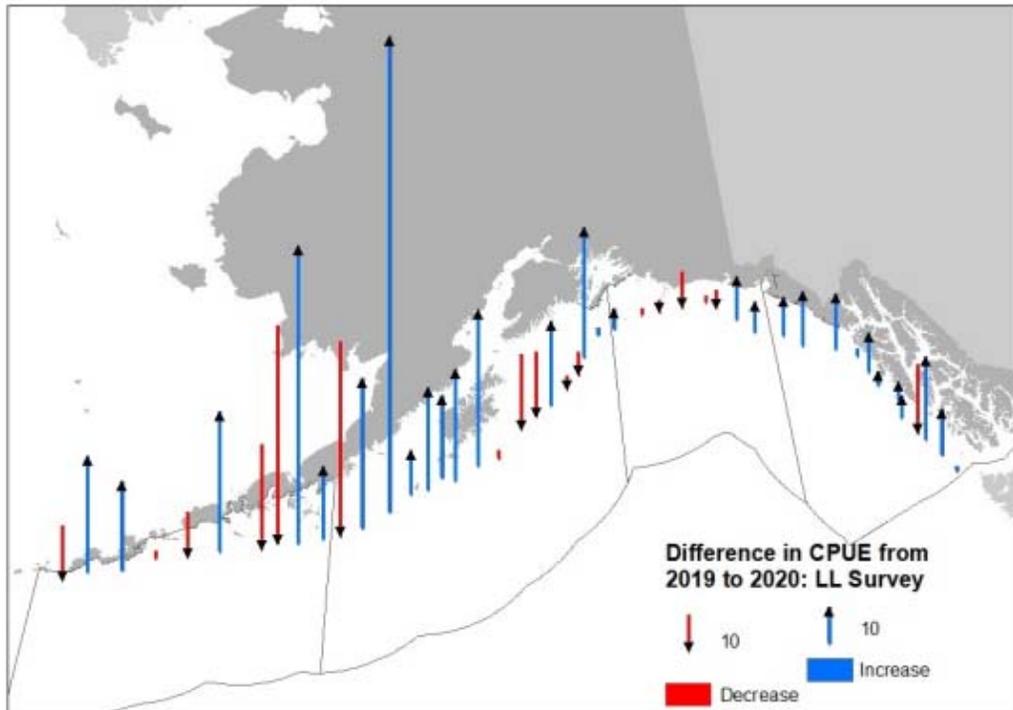


Figure 3.8a. Comparison of the 2019 and 2020 longline survey in the Gulf of Alaska. Top panel is in CPUE (number per skate); bottom panel is the difference in CPUE from 2019 in the 2020 survey. Numbers are not corrected for sperm whale depredation.

The three month calendar for the NPFMC for sablefish and halibut is as follows.

- February 1-12th:** Initial review of release of small sablefish.
- March:** IFQ committee meeting to take up sablefish and halibut discussion for changes, this would be when we ask for changes to accommodate pot issues for sablefish, such as pot limits and the 9 inch tunnel opening.
- April 5-11th:**
 - Small sablefish final action
 - BSAI Halibut bycatch initial review
 - IFQ access opportunities discussion paper
 - GOA pot 3 year review- from the March meeting
 - IFQ committee report- from the March meeting

IPHC

The Halibut Commission will meet via the internet in January 2021. Below are several charts indicating the status of Halibut. It remains at a low status. The survey in 2020 showed a 6% increase in the biomass of fish over 32 inches in length, coast wide. Almost all of this increase is from Area 3A. The survey of total numbers of fish observed in the survey decreased by 1% coast-wide. The staff suggests the increase in biomass is from older fish putting on weight, not from new-year classes entering the resource.

The table below shows what IPHC staff had recommended as harvest limits and what was actually adopted. Note the bottom line for 2021 is an increase in 3A and 3B and several other areas out west. I am not so sure about 4B, based on industry log books, which show a decline.

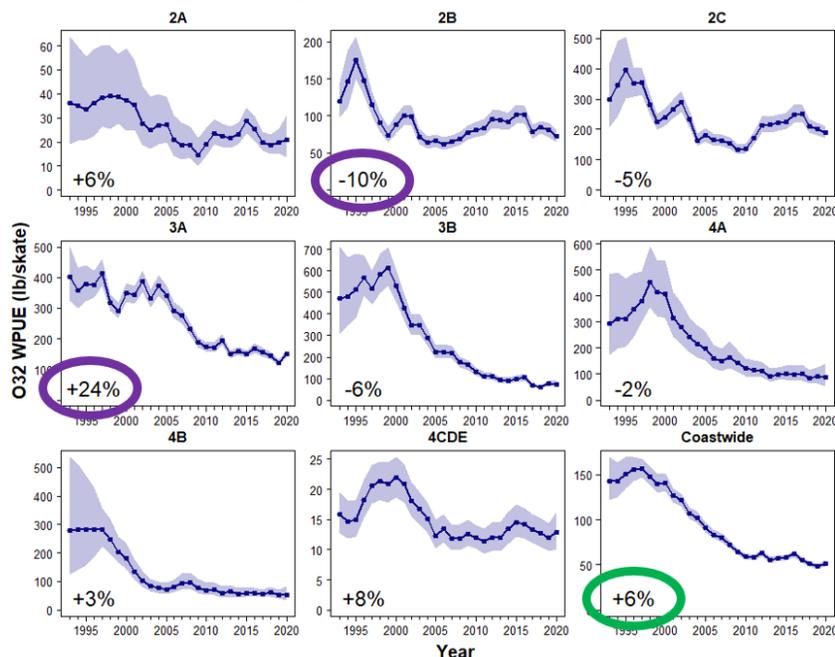
Reference TCEYs

	2A	2B	2C	3A	3B	4A	4B	4CDE	Total
2018	0.59	3.84	5.65	12.07	2.56	1.69	1.21	3.39	31.00
2019	0.78	4.91	6.26	16.35	2.97	2.21	1.95	4.59	40.00
2020	1.65	5.80	4.97	9.80	2.94	2.26	1.27	3.22	31.90
2021	1.65	7.00	5.16	14.11	3.12	2.51	1.47	3.98	39.00

Adopted TCEYs

	2A	2B	2C	3A	3B	4A	4B	4CDE	Total
2018	1.32	7.10	6.34	12.54	3.27	1.74	1.28	3.62	37.21
2019	1.65	6.83	6.34	13.50	2.90	1.94	1.45	4.00	38.61
2020	1.65	6.83	5.85	12.20	3.12	1.75	1.31	3.90	36.60

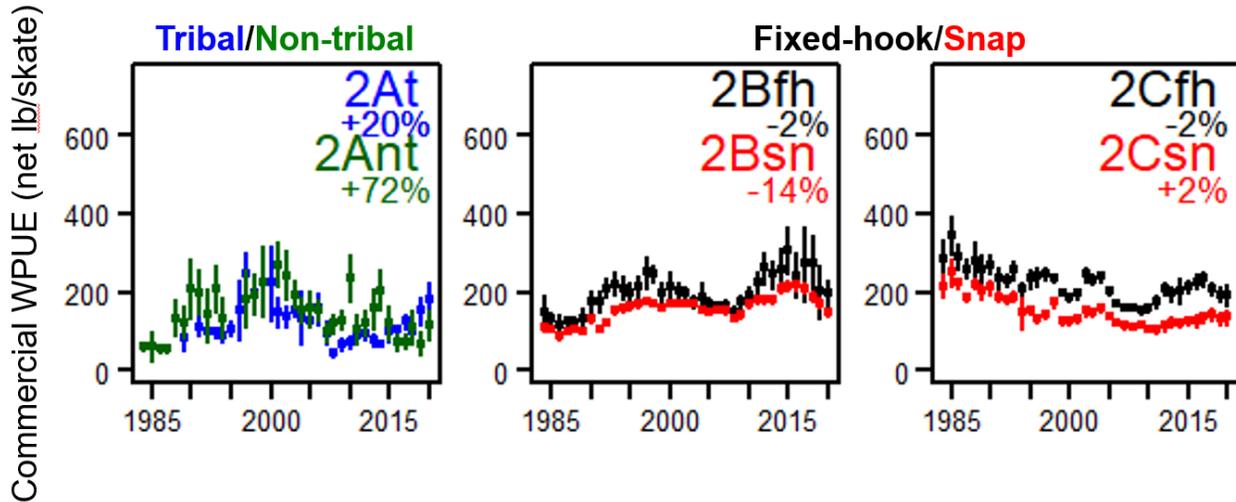
Modelled survey trends (O32 WPUE)



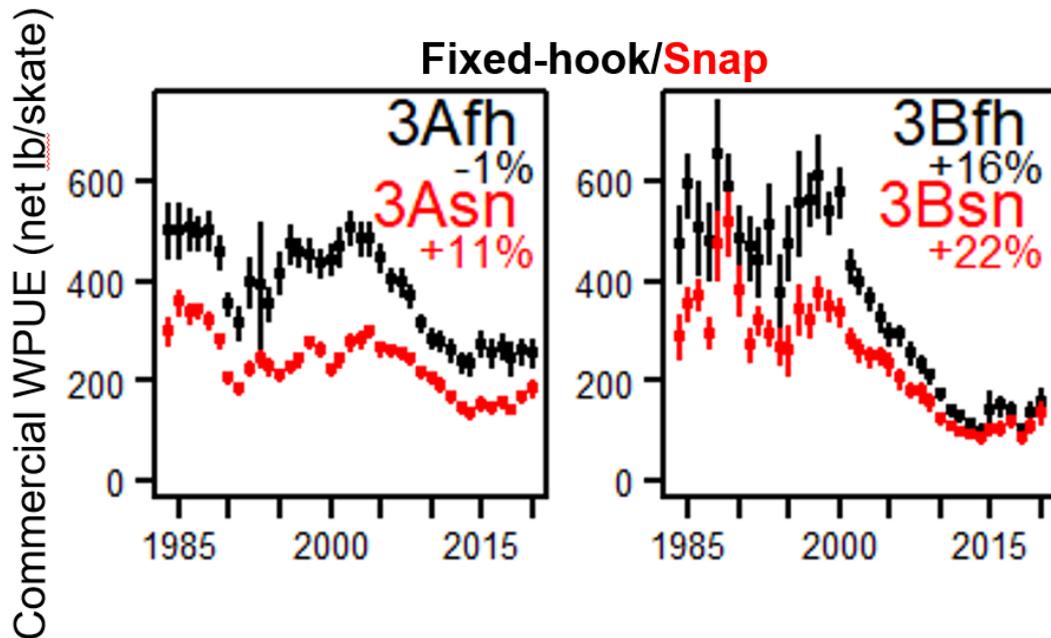
Indicates growth productivity is from O32 sizes

The charts below are from the log books for regions 2 and 3, “fh” means fixed hooks and “sn” refers to snap-on gear.

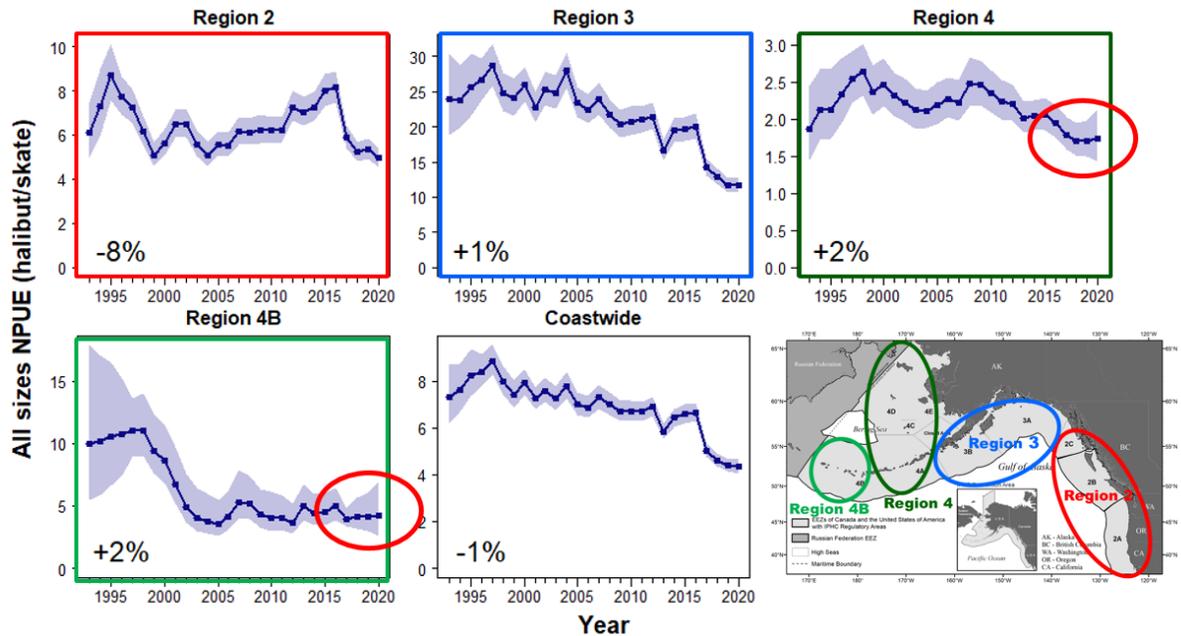
Fishery trends: Region 2



Fishery trends: Region 3



Modelled survey trends (Numbers)



****Pacific Council****

The following will be the poundages for the sablefish tier fisheries for 2021.

	2020	2021	
Tier 1	48,642 lbs.	58,649 lbs.	Up 21%
Tier 2	22,110 lbs.	26659 lbs.	Up 21%
Tier 3	12,634 lbs.	15,234 lbs.	Up 21%

Gear switching

The Council made a motion to look at gear switching levels of 0, 12%, 20%, 33% and unrestricted. I suspect the Council has put so much time into this issue they will eventually restrict gear switching to some degree. Twelve percent is equal to those who bought and own trawl quota that exclusively gear switch it. I think they will be held harmless, but not allowed to do more than what they own currently. The Council may take action to identify the percentage of gear switching at the April meeting.

Washington D.C.

It is too early to know who will be appointed to head of NMFS. Chris Oliver, the current administrator will leave the 20th of January. The biggest concern raised so far is the potential for a Presidential Executive Order from the administration to lock up 30% to 40% of fishable habitats

without going through Congress. We have signed onto some letters addressing this new proposal, expressing opposition.

****Market****

Halibut

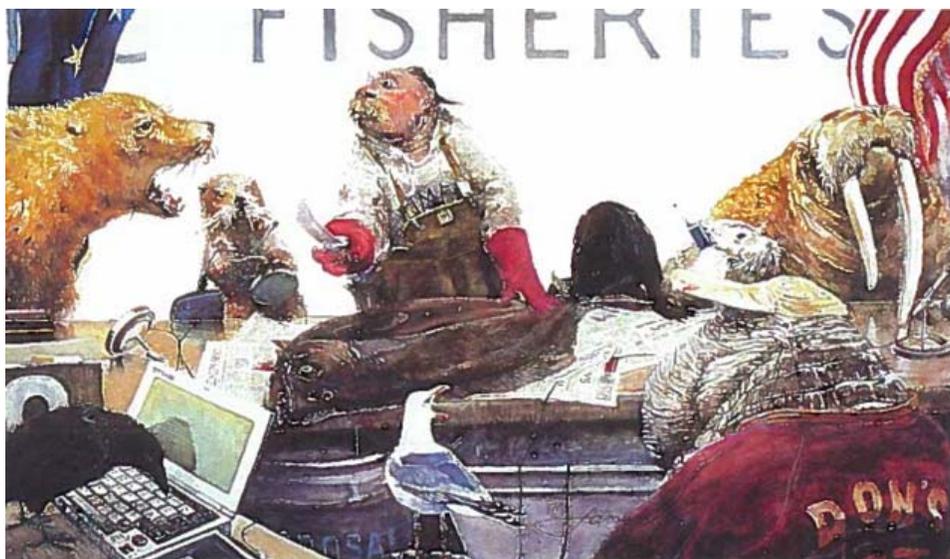
I have talked to a number of buyers and they believe inventory is moving and there will be little carry over for the start of the 2021 season. Prices were supported by a reasonable retail market, but retail cannot substitute for the restaurant trade. Hopefully, some of the restaurant trade will come back over time by spring and summer.

Sablefish

The buyers I have talked to say the under 5 lbs. market has been gaining strength this fall and this winter. They do not expect much carry over by the time the season begins. Japan is still the biggest market with 60%-65% of our catch being exported there. Their restaurant trade is what will push demand up, but it is currently locked down the same as the West Coast. I am bullish on sablefish going into 2021.

**** Calendar****

Dec. 24-Jan. 3	Office Closed- Happy Holidays
Jan. 25-29, 2020*	IPHC Annual Meeting
Jan. - TBD	Halibut Producers' Pool Annual Meeting
Feb. 1-8, 2021*	NPFMC Meeting
Feb. - TBD	Marine Safety Reserve Annual Meeting
Mar. 3-10, 2021*	Pacific Council Meeting
	*All meetings to be held virtually until further notice



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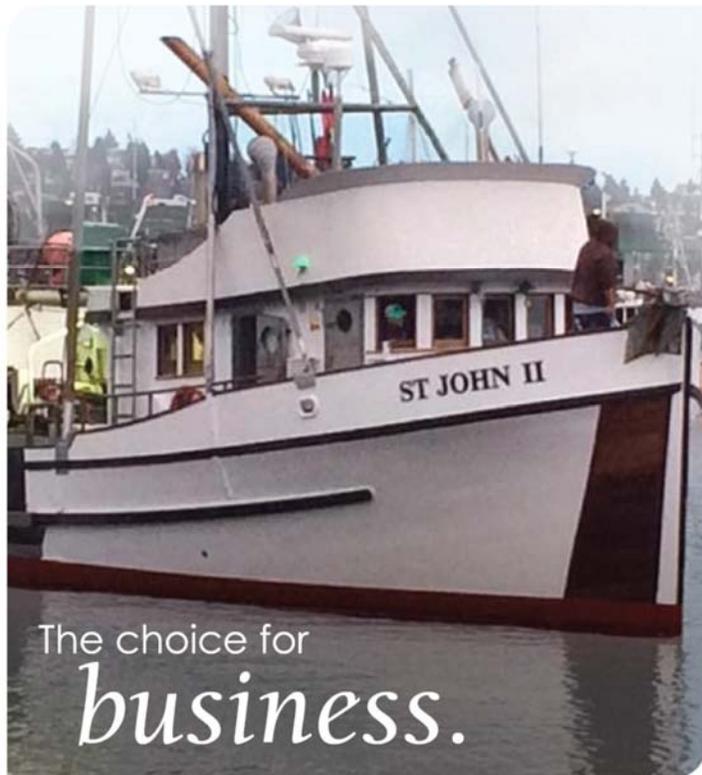
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Happy Holidays!



Maiden voyage of the Attu and old sailing ships in the background, Lake Union 1924



Arne Lee and his gang on the FV Evening Star in Poulsbo, WA