

Oregon Department of Fish and Wildlife

Report on the 2017 Oregon Recreational and Commercial Pacific Halibut Fisheries

and

Economic Impacts of 2018 Default Harvest Control Rule



Oregon Department of Fish and Wildlife
Marine Resources Program

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2017 Oregon Recreational Fisheries

Allocation

Beginning in 2014, the Oregon recreational Pacific halibut fishery has received 20.0 percent of the Area 2A Total Allowable Catch (TAC), or catch limit as indicated in the Pacific Fishery Management Council (PFMC) “Pacific Halibut Catch Sharing Plan” (CSP). Previously, the Oregon and California recreational fisheries had been combined and received 20.6 percent of the Area 2A TAC. Beginning 2016, 2.3 percent of the Oregon recreational allocation was allocated to the Columbia River subarea (Leadbetter Point, Washington to Cape Falcon, Oregon; Figure 1). The Central Oregon Coast Subarea (Cape Falcon to Humbug Mountain) was allocated 93.79 percent and the Southern Oregon Subarea (Humbug Mountain to the OR/CA Border) received 3.91 percent of the Oregon recreational allocation.

Recreational Catch Monitoring

Catch estimates were derived using data obtained from the Oregon Recreational Boat Survey (ORBS). Catches, by port and boat type (charter or private), were calculated by applying trip level data obtained from dockside sampling (mean anglers per boat, mean fish weight, mean fish per angler, proportion of trips targeting Pacific halibut, proportion of non-targeted trips with incidental catch of Pacific halibut) to total effort counts (boats). Samplers were instructed to measure the lengths of all Pacific halibut from every other boat sampled, for both the private and charter fleets. This information was used to estimate total weight of fish landed. In 2017, statewide, 3,809 Pacific halibut were sampled, which was 32.4 percent of the estimated 11,754 Pacific halibut landed into Oregon (Table 1).

Groundfish Retention

For 2017, retention of all groundfish except other flatfish species (new in 2015), sablefish and Pacific cod were once again prohibited in the Columbia River and Oregon Central Coast all-depth fisheries if Pacific halibut were aboard the vessel. This provision is to reduce incidental take of yelloweye rockfish, federally classified as an overfished species. Sablefish and Pacific cod were allowed to be retained as they are rarely targeted; rather, take in the directed halibut fishery is often incidental. Groundfish retention was allowed in the nearshore halibut fishery (in areas open for groundfish fishing) when the all-depth fishery was closed and in the Southern Oregon subarea because the majority of halibut fishing occurs inside of 40 fathoms, where yelloweye rockfish are less abundant and have higher survival after release.

Since 2005, the high relief area of Stonewall Bank, located approximately 15 miles off Newport, has been closed to halibut fishing (Figure 1). The intent of this provision is also to reduce the incidental take of yelloweye rockfish.

Discussion

Columbia River Subarea (Leadbetter Point, Washington to Cape Falcon, Oregon)

In 2017, the Columbia River fishery was scheduled to have two openings, an all-depth season beginning the 1st Thursday of May, continuing 4 days per week (Thurs-Sun) until the quota was attained or September 30, and a nearshore fishery opening the Monday after the first all-depth opening, continuing 3 days per week (Mon-Wed) until the quota was attained or September 30. On May 25, 2017 the all-depth season closed with a total of 11,371 pounds caught, which was 928

pounds under the 12,299 pound allocation. In mid-June, the Washington Department of Fish and Wildlife (WDFW) determined that there was enough allocation remaining to open all Washington subareas, including the Columbia River Subarea, with the 928 pounds remaining, for one more day of all-depth fishing. ODFW agreed to reopen the Columbia River Subarea on June 17, 2017 for one additional day. Effort and landings on that additional open day were higher than anticipated, with 2,459 pounds landed, bringing total landings to 13,830 pounds, 1,531 pounds over the allocation. The overage in the all-depth season was greater than what was set aside for the nearshore season. Therefore, the nearshore season closed on June 23. There had been minimal effort and 184 pounds landed in the nearshore fishery at that time. An estimated 1,044 pounds (7.5 percent of the total subarea catch) were landed into Oregon ports, all from the all-depth season (Table 1). The total Oregon contribution to the subarea catch limit was 5,905 pounds, 2.3 percent of the Oregon recreational allocation.

Oregon Central Coast Subarea (Cape Falcon to Humbug Mountain)

The fishery in this subarea has two components: a shallow nearshore fishery and a directed all-depth fishery (spring and summer seasons).

Nearshore fishery (inside 40 fathoms)

Beginning in 2010, anglers began targeting halibut inside 40 fathoms rather than just catching incidentally on bottomfish or other trips, resulting in earlier than anticipated closures. To extend the season, in 2013 the nearshore fishery was changed from seven days per week to three days per week (Thursday, Friday, and Saturday). However, the nearshore season closed within one calendar day of when it had in 2012, even with the three day per week openings. Many anglers were unhappy with the three day per week openings, and requested going back to seven day per week, but opening later in the year. The intention was to allow halibut opportunities later into the summer months. Therefore, beginning in 2014, the nearshore fishery opened on July 1, seven days per week and remained open through October 31, or until allocation attainment. Due to leaving some allocation unharvested in 2014, anglers requested that the fishery opening date be moved to June 1, beginning in 2016.

In 2017, the initial allocation to the central coast nearshore fishery was 28,897 pounds. Through July 30, there were 27,967 pounds landed, leaving only 930 pounds remaining. The nearshore fishery was then closed beginning on July 31. The week prior to the Labor Day holiday weekend, ODFW consulted with the National Marine Fisheries Services (NMFS) and International Pacific Halibut Commission (IPHC) on the status of Oregon recreational fisheries. It was determined at that time that the Southern Oregon Subarea was unlikely to take the entire allocation prior to the regulator closure of October 31, therefore 4,000 pounds was transferred to the Central Oregon Coast Subarea nearshore fishery, allowing it to reopen on August 28. On September 22, the 2,734 pounds remaining from the summer all-depth season were moved to the nearshore fishery to keep it open through the regulatory closure of October 31. Total catch was 34,865 pounds, which was 766 pounds (2 percent) under the adjusted allocation of 35,631 pounds.

All-depth fishery

The directed all-depth fishery, split into spring (May-July) and summer (August-October) seasons, is allocated 88 percent of the Oregon Central Coast subarea catch limit. In 2017, 71.6 percent of that amount (151,712 pounds) was allocated to the spring fishery and the remainder to the summer fishery (60,203 pounds).

The 2017 spring season was managed in two periods, each with fishing allowed Thursday, Friday and Saturday. The first period was managed under the fixed-day approach in use since 1995: a number of fixed dates are set preseason so anglers can plan their fishing in advance, with the intent to not exceed the spring catch limit. Any remaining poundage is available for a second open period in the spring; these “make-up” dates are also set preseason. The first period (fixed-day season) was open for 15 days on May 11-13; May 18-20; June 1-3; June 8-10; and June 15-17. During the five fixed openings, there were two that had low effort and landings due to weather and ocean conditions, the other three had good weather allowing for high effort. After the fixed dates, enough quota remained for three back-up days of fishing. The total catch from the spring season was 145,634 pounds (Table 1), or 96 percent of the spring all-depth catch limit. The remaining 6,078 pounds was shifted to the summer all-depth fishery.

The 2017 summer fishery was set preseason to open every other Friday and Saturday from August 4 through October 31. The opening weekend, had good weather which allowed for more effort and landings than seen in the last two summers’ opening weekend. Weather conditions were not as favorable the following two openings. After the fourth opening, ODFW consulted with IPHC and NMFS and determined that not enough quota remained for any additional all-depth days. Therefore, the remaining 2,734 pounds were transferred to the nearshore fishery. The total catch in the summer fishery was 63,547 pounds (Table 1), under the revised summer fishery catch limit of 66,281 pounds by 2,734 pounds (4 percent).

Combined Nearshore and All-Depth Fisheries

The combined catch from the nearshore and all-depth fisheries was 244,046 pounds, or 101 percent of the 240,812 pound initial total allocation (99.6 percent of the adjusted 244,812 pound allocation) for the Oregon Central Coast subarea.

Southern Oregon Subarea

Until 2011, Pacific halibut were rarely targeted off Oregon in the former South of Humbug subarea as this area is located in what was thought to be the southern edge of the species’ range. Beginning in 2014, a new Southern Oregon Subarea was created from Humbug Mountain to the Oregon/California Border. The Southern Oregon subarea received 3.91 percent of the Oregon recreational allocation (10,039 pounds). During 2017, as in 2015 and 2016, early season had little success compared to 2010-2013 primarily due to unfavorable current and weather conditions. Effort and catch picked up some in late July when other opportunities began to decrease and the weather and ocean became more favorable. There was minimal effort or catch from this subarea after Labor Day weekend, again primarily due to weather conditions. In late August, this subarea was not anticipated to require its entire allocation, and 4,000 pounds were transferred to the Central Oregon Coast Subarea nearshore season. The intent was to keep both fisheries open through the regulatory closure of October 31, which was achieved. The catch estimate for the Southern Oregon subarea was 2,811 pounds, under the adjusted allocation of 6,039 pounds by 3,228 pounds, 53 percent.

Summary

The combined catch of Pacific halibut in the 2017 Oregon recreational fisheries is estimated at 247,900 pounds. The catch was comprised of an estimated 11,754 fish averaging 21.1 pounds net weight (Table 1). An estimated 20,400 halibut targeted angler trips contributed \$2.5 million, via spending on trip- and fishing-related expenses such as hotels, lodging, tackle, and other items.

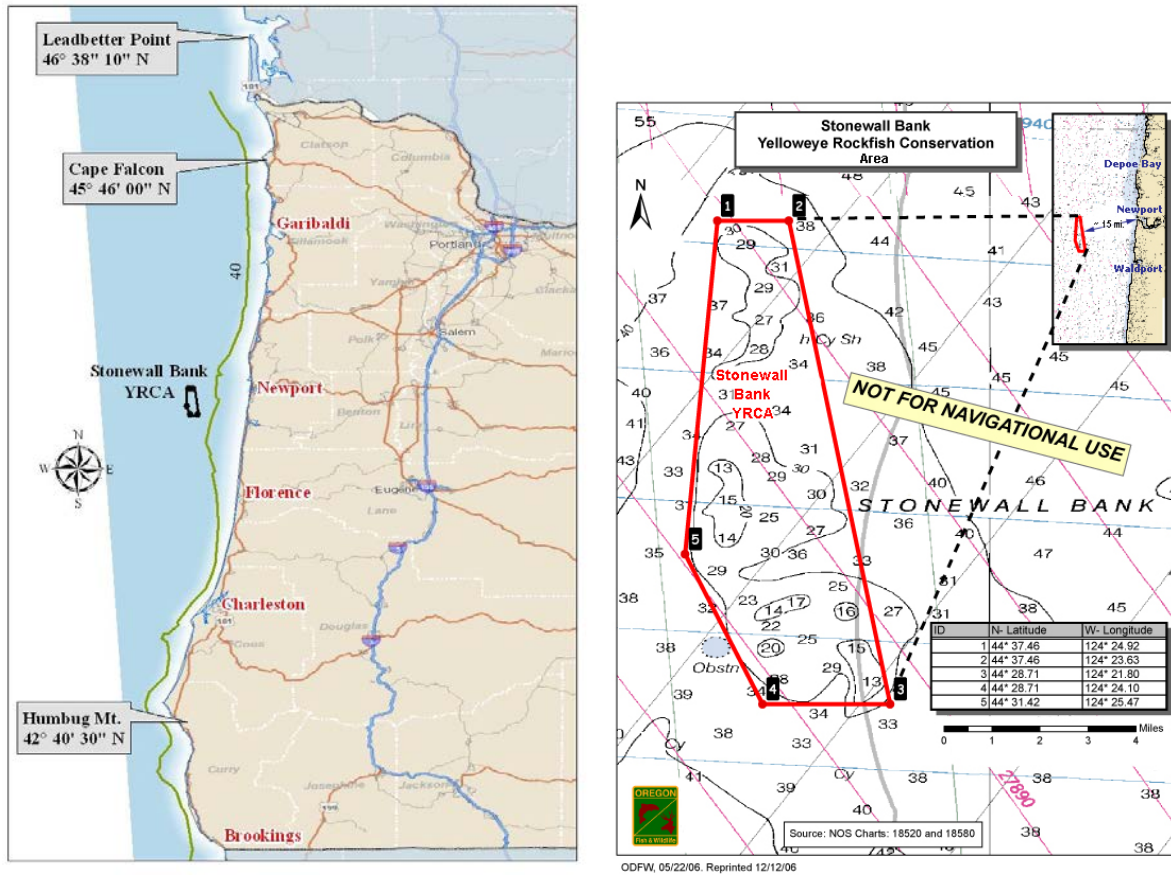


Figure 1. Maps with Oregon Pacific halibut recreational regulation locations, including Stonewall Bank Yelloweye Rockfish Conservation Area

Table 1. 2017 Oregon Pacific halibut recreational fishery catch data.

Subarea	Season	No. of Halibut Sampled	Average Weight (net lbs.)	No. of Halibut Harvested	Total Pounds (Net Weight)
Columbia River	All-Depth	38	14.1	74	1,044
	Nearshore	0	N/A	0	0
Central Oregon Coast	Spring All-Depth	2,126	20.4	7,132	145,634
	Summer All-Depth	1,070	22.1	2,876	63,547
	Nearshore	510	22.4	1,557	34,865
Southern Oregon Subarea		65	24.4	115	2,811
Total		3,809	21.1	11,754	247,900

2017 Oregon Commercial Fishery

A brief review of Oregon’s commercial Pacific halibut fishery in recent years with a focus on 2017 is below¹. A more detailed report prepared in 2014 on the economics of Oregon’s recreational and commercial fisheries is available at:

www.dfw.state.or.us/MRP/finfish/halibut/docs/management/EconomicHalibutReport2014.pdf

Participation

The Oregon commercial halibut fishery provides a small amount of harvest revenue to a relatively large number of participants. A few vessels are dependent on the fishery for a majority of their annual revenue. The explanation for the large number of participants includes the low gear-up costs for participation, and open access licensing. In addition to directed fishery participation, there are many participants in the incidental halibut salmon troll fishery. Oregon-registered vessels with an IPHC license for commercial halibut in Area 2A are shown in Table 2. Approximately 50 percent of those vessels that had directed commercial licenses made deliveries of Pacific halibut in 2017; as did approximately 34 percent of those with incidental troll salmon licenses. While the average per-vessel harvest revenue is somewhat minor in recent years for the directed halibut fishery (\$1,000 to \$10,000), there may be some participation motivated by wanting to continue a landings history if this currently open-access, derby style fishery were to become an individual fishing quota fishery in the future. Additionally, with some limited opportunities in other fisheries, such as salmon, some vessels may be expanding their annual portfolio of fisheries they participate in to keep the vessel fishing and earning income.

Table 2. Number of Oregon-registered vessels with an IPHC license for commercial halibut fisheries in Area 2A, 2012-2017

Oregon Registered Vessels	2012	2013	2014	2015	2016	2017
Directed Commercial	115	88	99	92	109	135
Incidental Sablefish (N of Pt. Chehalis)	1	0	2	0	1	1
Directed and Incidental Sablefish	4	8	5	5	1	3
Incidental Troll Salmon	173	192	239	230	193	116

Harvesting and Processing

During the directed fishery, there were 229,000 round weight pounds landed into Oregon at an ex-vessel value of \$1.39 million in 2017 (Table 3). During the incidental to salmon troll fishery, there were 4,000 pounds round weight landed into Oregon, for an ex-vessel value of \$0.027 million in 2017. Halibut ex-vessel prices averaged \$6.05 per round weight pound in 2017. There were a total of 118 unique vessels that had shoreside halibut landings in Oregon in 2017. Of the 105 vessels, 39 vessels landed halibut with troll gear (i.e., the incidental salmon fishery), and 66 landed halibut with longline or hook and line gears (i.e., the directed fishery). There were also 13 vessels

¹ Full report: <http://www.dfw.state.or.us/MRP/finfish/halibut/docs/management/EconomicHalibutReport2016.pdf>

that landed halibut in the shoreside Pacific whiting fishery¹ in 2016. There were 144 deliveries in the directed fishery, 85 deliveries in the incidental salmon troll fishery, and 28 deliveries in the shoreside whiting fishery in 2017 (Table 3). Forty-five percent of the vessels in the directed fishery had less than \$10,000 in ex-vessel revenue in 2017, while only 15 percent had over \$50,000 in ex-vessel revenue. The average ex-vessel revenue in 2017 was \$21,000, while the median was approximately \$11,000.

Table 3. Summary of commercial Pacific halibut fisheries information.

Sector	# of Vessels	# deliveries	Pounds Landed	Avg. Ex-vessel price per pound	Total Ex-Vessel Price
Incidental with Salmon	39	85	3,985	\$6.83	\$27,213.00
Directed fishery	66	144	229,158	\$6.05	\$1,386,231.00
Shoreside whiting	13	28	648	\$0.00	\$0.00
Total	118	257	233,791	\$6.06	\$1,413,444.00

Fifteen processors or buyers purchased over \$10,000 of landed halibut each in 2017, and this comprised over 98 percent of all halibut landings in Oregon. The top three processors or buyers purchased about 71 percent of all Oregon halibut landings.²

Economic Impacts of 2018 Catch Alternatives

To inform the biological and economic trade-offs associated with the Area 2A 2018 catch alternatives, ODFW compared the difference in total economic impacts between: (1) Status Quo, which is a carryover of the 2017 catch limit of 1.33 million pounds, and (2) the Default SPR which equals TCEY of 0.59 million pounds.

The Default SPR would result in a 2A TCEY of 0.59 million pounds and a FCEY of 0.47 million pounds, which would be a reduction of 0.86 million pounds and approximately a 65% reduction from the 2017 catch limit. This corresponds to a decrease of USD \$ 5.4 million in personal income and 108 jobs for the U.S. West Coast (Table 4).

These economic impact projections are based on the predicted reductions of ex-vessel revenue for each West Coast commercial fishery (i.e., tribal and non-tribal by state) and predicted reductions in recreational private and charter trips for each state, which are then expanded to total economic impacts (income and jobs) via the use of the respective “multipliers” from the IO-PAC model ([Leonard and Watson 2011](#)) that is used by the National Marine Fisheries Service to evaluate economic impacts for West Coast fisheries.

It is important to note that these would be the theoretical maximum economic reductions, as they are based on an assumption there is no substitution from the lost halibut activity to other activities

¹ The Pacific whiting fishery is a maximized retention fishery. Harvesters are not paid for the landings and processors typically distribute the fish to food banks or destroy them

2. Processor receipts of halibut include research, discard, trawl, and catch from outside the EEZ.

that could provide economic benefits. In other words, the true economic effects of reduced halibut catch limits will likely be less than the theoretical maximum reductions provided here since commercial fishermen could switch to other revenue sources (e.g., other fisheries or non-fishery jobs), and recreational anglers could spend the money they would have normally spent on a halibut trip on other fisheries or non-fishery activities. Since these substitution effects cannot be accurately predicted without complex social research studies, the theoretical maximums are provided for reference, with a strong caveat that the actual economic impacts would likely be lesser.

Table 4. Theoretical maximum economic reductions associated with a reduction in the 2018 from 2017 Status Quo catch limit (SQ; 1.33 million pounds) to the default SPR (DSPR; 0.59 million pounds).

Sector	Economic input ^{a/}			\$ Personal income (wages)			Jobs (full + part time)		
	2017	2018 DHCR	Decrease	2017	2018 DHCR	Decrease	2017	2018 DHCR	Decrease
Commercial	3,176,584	1,207,102	-1,969,482	\$5,217,955	\$1,982,823	-\$3,235,132	98	37	-60
Sport	35,873	13,632	-22,241	\$3,418,697	\$1,299,050	-\$2,119,647	77	29	-48
Total	---	---	---	\$8,636,652	\$3,281,873	-\$5,354,779	174	66	-108

^{a/} Millions of U.S. dollars in ex-vessel revenue for commercial and thousands of angler trips (privately owned vessels and for-hire chartered/guided)