

A close-up photograph of fish scales and fins, showing the intricate texture of the scales and the dark, pointed fins. The image is partially obscured by an orange horizontal band.

# Role of the Seafood Industry in Alaska and the Pacific Northwest



**McKINLEY RESEARCH**  
GROUP, LLC

**Northwest Managers Conference**  
Fairbanks, Alaska – March 29, 2023

# McKinley Research Group



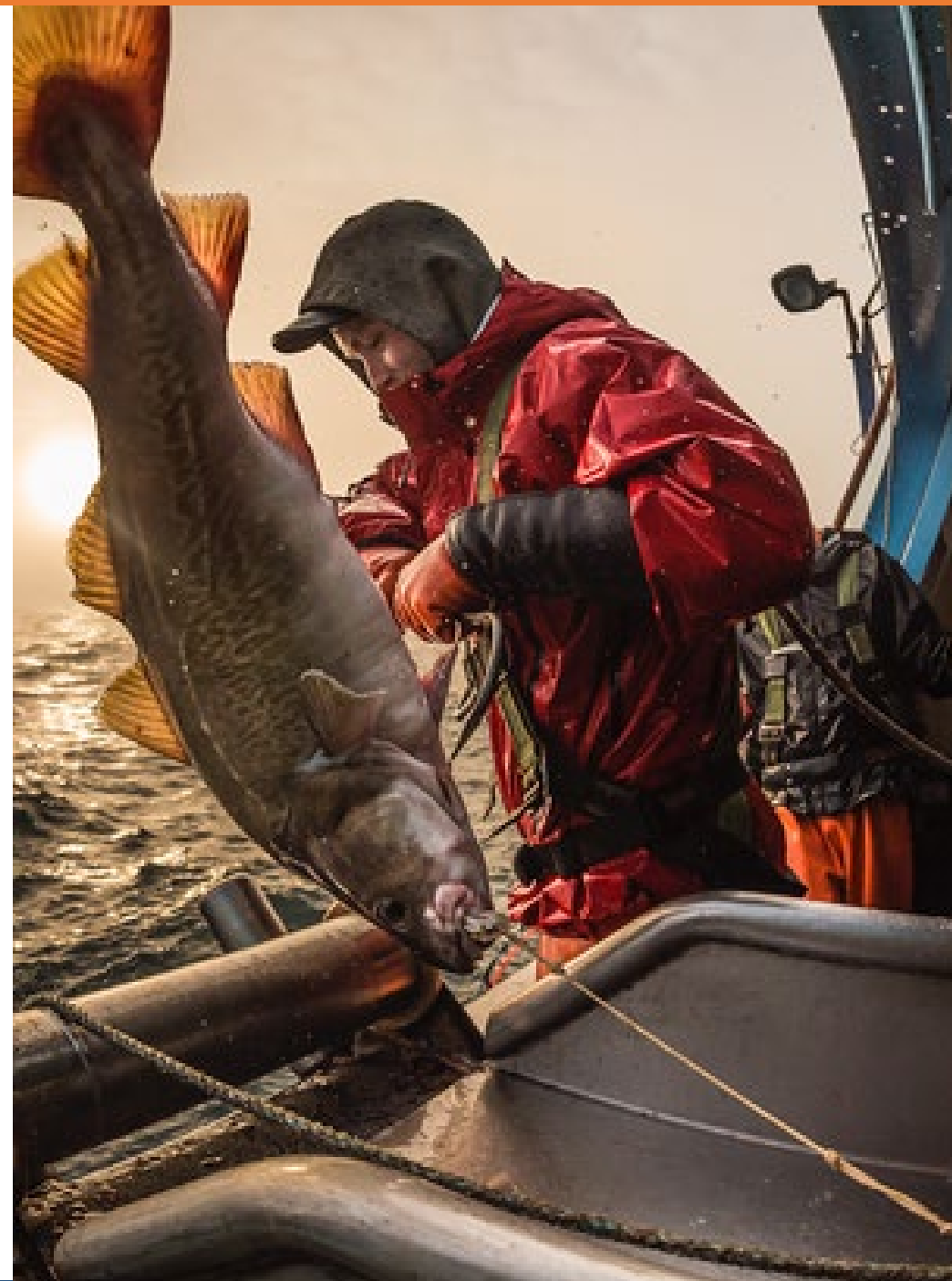
- Research and consulting since 1972
- Offices in Anchorage and Juneau with staff in Washington and Vermont
- Economic analysis, community/economic/business development, and more
- Conducted 100+ economic impact studies for many sectors
  - 20+ years of support for Alaska Seafood Marketing Institute (ASMI)
    - Market analyses, economic impacts, feasibility studies, industry insights, facilitation
- Also work in Pacific Northwest, including:
  - Economics: *Economic Impact of Alaska on Puget Sound*
  - Fisheries: *Modernization of the North Pacific Fishing Fleet Economic Analysis*
  - Maritime: *Economic Impact of the Ballard Locks, Port of Anacortes Marina Impacts, Ports of Clarkson and Lewiston River Boat Impacts and Market Analysis, Port of Kalama Comprehensive Scheme*
  - Visitor Industry: *Port of Seattle Cruise Passenger Surveys*
  - Mining, oil and gas, security, and other industries...



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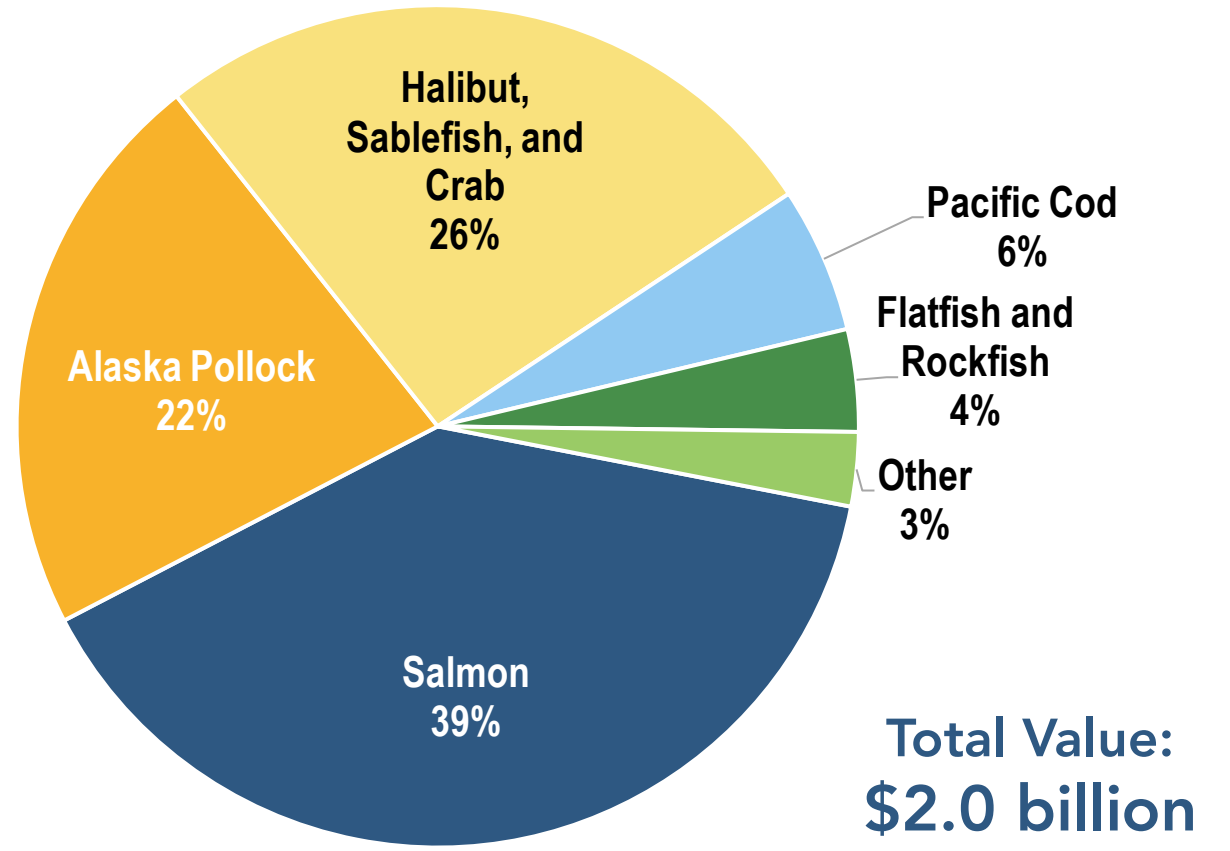
## Today's Presentation

- Overview of Alaska's seafood production
  - What we produce
  - The size of our fleet
  - Where are the Alaska jobs
- National and Global context of our industry
  - Market share
  - National workforce
- Economic Impact
  - U.S., Washington, and Alaska
  - Alaska taxation





## Alaska Ex-Vessel Value, 2021, by Species

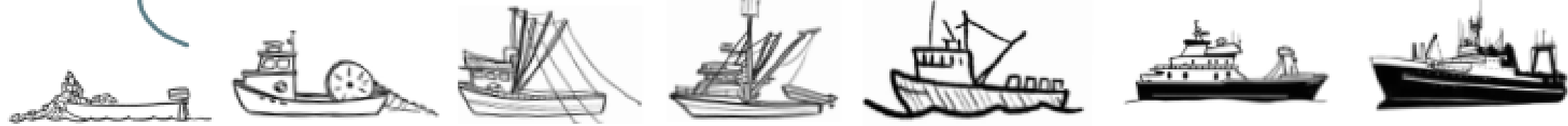


# Size of Alaska's Fishing Fleet

2019 Figures



If all the vessels used in the Alaska seafood industry were lined up bow to stern they would stretch on for nearly 63 miles!

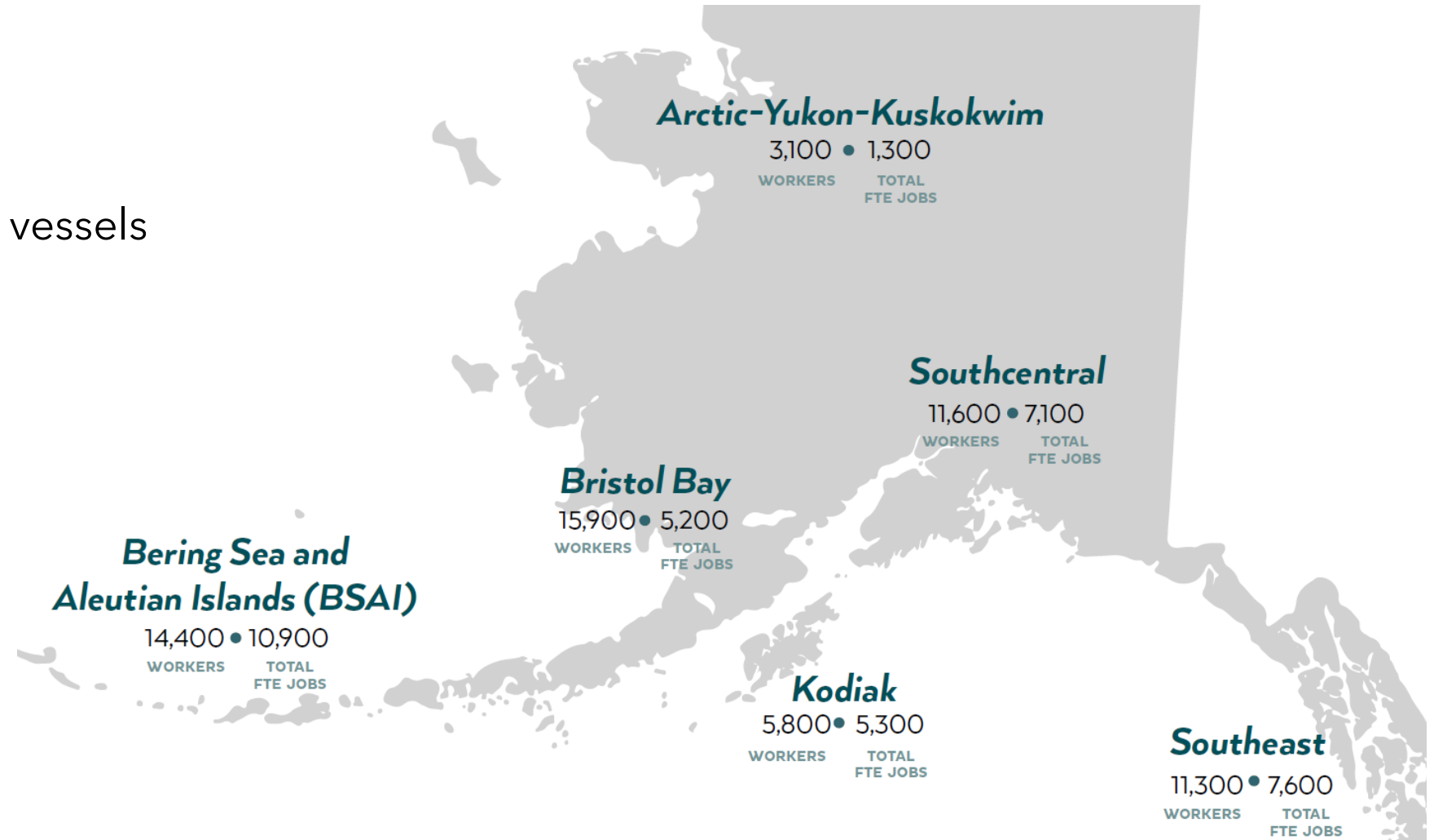


Length (feet)	<23'	23' - 32'	33' - 49'	50' - 58'	59' - 99'	100' - 199'	200'+
Count	2,067	3,229	2,188	722	388	285	38

Note: Skiffs and small craft may be understated in the data above.

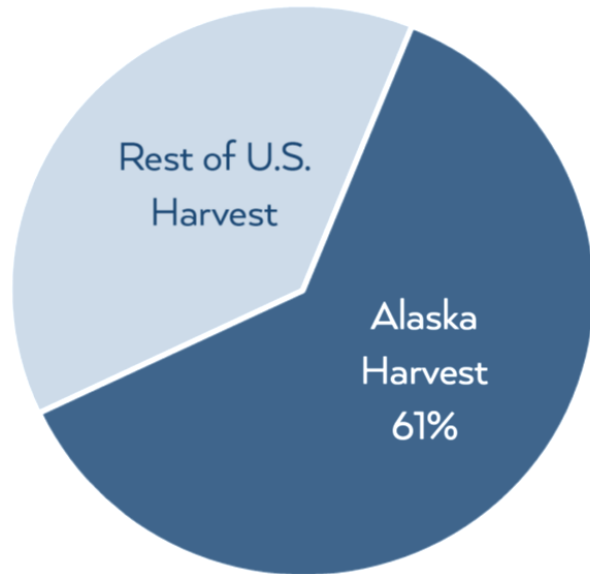
# Alaska Seafood Industry Regional Job Impacts

- 36,100 workers
- 21,400 FTE jobs
- 1,337 resident-owned vessels

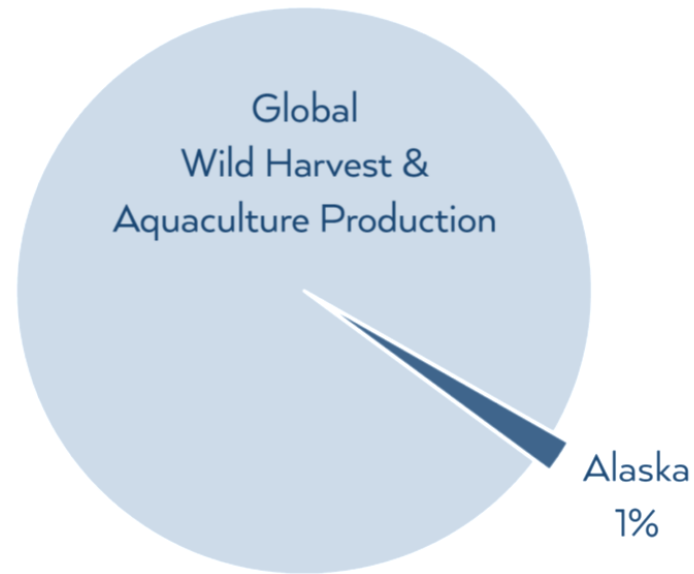


# Alaska Seafood in U.S. and Global Context

## U.S. market



## Global market



Alaska contributes to the global supply:

- 41% of Alaska pollock
- 30-40% of wild salmon
- 66% of sablefish
- 61% of Pacific halibut
- 21% of flatfish
- 10% of cod

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## National Impacts

- **>100,000** FTE U.S. Jobs
- **\$6B** in annual labor income
- **\$15 B** in economic output (fishing processing, distribution, retail)
- Home to **9** out of **top 20** U.S. fishing ports **by value**
- Home to **8** out of **top 20** U.S. fishing ports **by volume**

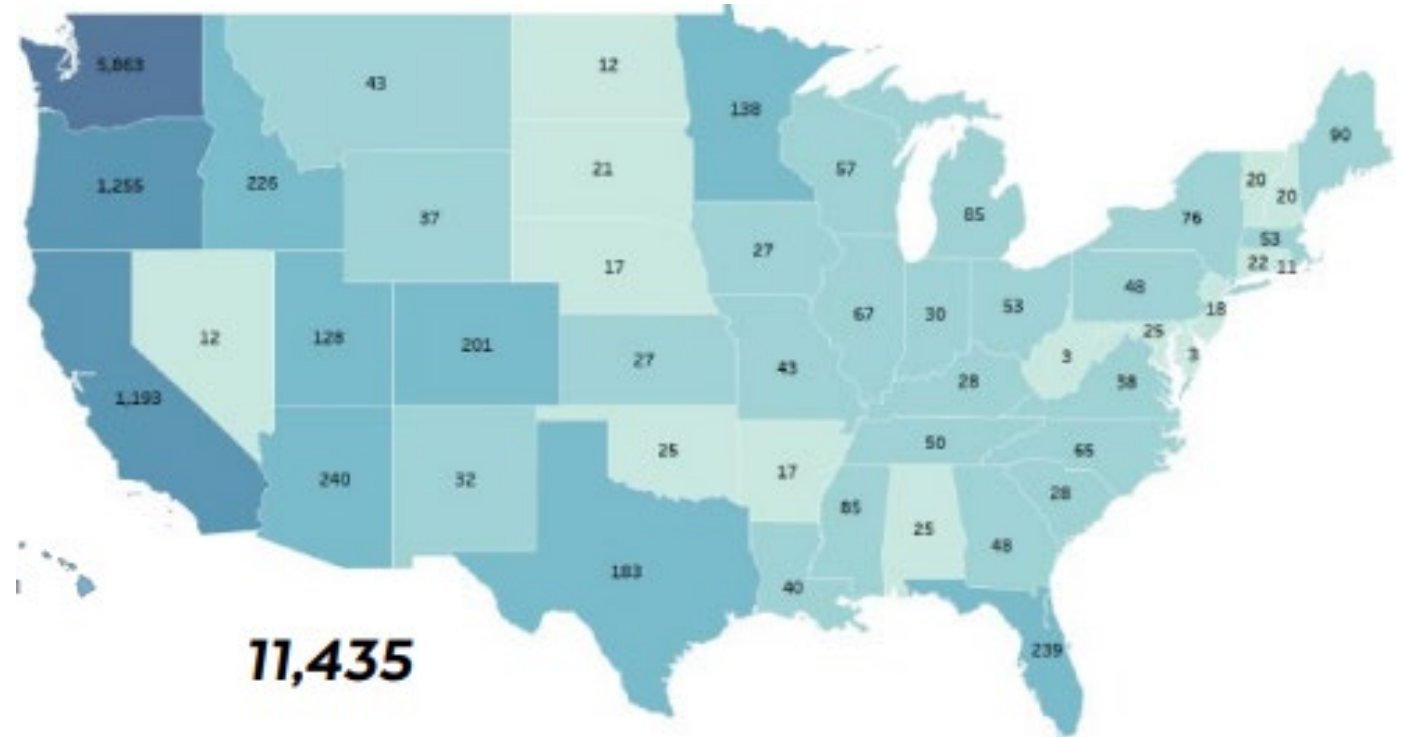
### Fun Fact

Alaska annually produces enough seafood to feed the world at least one serving of protein a year.



# Alaska's Commercial Fishing Workforce

- **63%** of skippers, permit owners, and crew were **Alaskans** (19,808 fisherman)
- In rural Alaska, the seafood industry is **among the largest source of jobs, income, and local taxes**
- **37% non-Alaska workers** (11,435) needed to address high volume and seasonal jobs





# Alaska Seafood & Washington State

- Vessel home porting, maintenance, supplies, shipping, processing, crew
- **893** WA vessels fished in Alaska
- **5,900** WA residents participated in Alaska fisheries
- Alaska ships **1 billion** pounds of finished seafood product to WA annually
- Total value of seafood shipped out of Ports of Seattle and Tacoma: **\$750 million**

# Economic Impacts in Alaska, 2021

- **62,000** jobs, **\$1.75 billion** earnings
- More than **8,900** vessels
- Over **160** shoreside and at-sea processing plants
- **\$2 billion** ex-vessel, **\$4.7 billion** wholesale
- Provides economic activity and tax revenue in rural Alaska from Ketchikan to Kotzebue



# Seafood Activity Impact on Tax Revenue

- **\$163 M** in taxes, fees, and self-assessments
- Fisheries Business Tax is the largest and paid by shore-based processors as a percentage of value
- Several **local governments** also **assess their own local fish taxes** on processors.



	2019, \$millions
<b>Taxes</b>	<b>\$81.6</b>
Fisheries Business Tax	\$45.4
Fisheries Resources Landing Tax	\$12.5
Marine Motor Fuel Tax	\$2.8
Corporate Income Tax	\$2.8
Local Raw Fish and Other Taxes	\$18.1
<b>Agency Fees &amp; Cost Recovery</b>	<b>\$60.7</b>
CFEC Permit and Vessel Fees	\$7.1
Crew License Sales	\$3.5
Test Fishery Receipts	\$3.4
Processing/Mariculture/Other Fees	\$6.7
Salmon Hatchery Cost Recovery <sup>4</sup>	\$27.0
Federal Cost Recovery Fees - Federal Share	\$8.0
Federal Cost Recovery Fees - State Share	\$1.6
Federal Observer Program	\$3.2
<b>Industry Self-Assessments</b>	<b>\$21.0</b>
Seafood Marketing (ASMI)	\$10.0
Salmon Enhancement	\$6.6
Seafood Development (RSDAs)	\$3.6
Dive Fishery Management	\$0.8
<b>Total</b>	<b>\$163.2</b>

Note: Data are for FY 2019. Totals may not sum due to rounding.

Sources: ADOR, CFEC, DCCED, ADF&G, NMFS, OMB, & McKinley Research Group.



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