

OREGON COMMERCIAL DUNGENESS CRAB FISHERY

1999-00 FISHING SEASON REVIEW

and

ISSUES UPDATE

Presented to

OREGON DUNGENESS CRAB COMMISSION

at

**Newport, Oregon
September 1, 2000**

By

**Rod Kaiser
John Schaefer
Oregon Department of Fish and Wildlife
Marine Resources Program
Newport, Oregon**

OREGON COMMERCIAL DUNGENESS CRAB FISHERY

SEASON UPDATE AND ISSUES REVIEW

Oregon 1999-00 Fishery (all data is preliminary)

Summary

The 1999-00 season began December 1, 1999 and ended August 14, 2000 with a preliminary landed catch of 15,617,000 pounds (fifth highest since 1947-48 season). The ex-vessel value set a record at \$31,300,000, nearly double the 1998-99 season value. Oregon's commercial Dungeness crab fishery is the single most valuable marine commercial fishery this past season.

Landings

The 1999-00 season landings of 15,617,000 exceeds the previous season catch (9,114,000) by 71% and the most recent 10 year average (10,224,000) by 53% (Table 1). Landings for December and January were 8,814,000 and 3,525,000 million pounds; 56% and 79% of total season landings, respectively. The summer fishery, June 1-August 14, landed 441,000 pounds (minimum estimate), more than double 1999 summer landings of 203,000 pounds and represented about 3% of the total season catch (Table 2). Current regulations place a 7% ceiling (in pounds) on the summer fishery based on total landings for the previous December through May period. For 2000, summer landings represented about 42% of the ceiling of 1,062,000 pounds.

Effort

Vessels: Total season vessel effort is estimated at 325 vessels, a 6% increase over the 1998-99 season (306), and well below the previous 10 year average of 365 vessels (table 1 and 2). This effort level; however, was within the range of 300-350 vessels active since implementation of Oregon's crab limited entry system implemented on December 1, 1995. The summer fishery effort was 152 vessels, 13% above 1999, and the highest on record, since 1985 (Table 2). Fourty seven percent of the season fleet fished during the summer fishery, a record level of participants.

Pots Fished: Commercial crab pots "declared" for fishing at the start of the 1999-00 season are estimated at 134,000 pots, 15% above the 1998-99 season estimate of 116,000 and 18% above the most recent 10 year average (Table 1). This estimate is a minimum value as additional gear can enter the fishery later in the season or during the summer months. Most importantly, the current season gear level represents a dramatic increase over recent years and is the second highest number of pots declared since record keeping began with the 1947-48 season. The previous pot record was recorded for the 1989-90 season (before limited entry) level and estimated at 151,000 pots.

With another excellent season catch and value expected by many fishermen for 2000-01, and the expectation (fear) of an Oregon pot limitation system is coming in the near future, significant

amounts of new pots are being built. It is entirely possible (likely) that the Oregon Dungeness crab fishery could set a new record for gear fished next season. If the gear increases only an additional 13%, we exceed the previous record level. A similar 15% increase (observed between the last two seasons) would push the number of active pots fished to about 160,000.

Major Issues in Fishery

Background of Issues

Several issues are presently being discussed and debated by the Oregon crab industry and ODFW relating to the Oregon commercial Dungeness crab fishery, the upcoming 2000-01 season, and beyond. Oregon's crab fishery has historically occupied a position as a "local" state managed fishery. Current events, from both inside and outside the fishery, are changing the nature and structure of Oregon's (and other west coast) crab fisheries.

There is considerable nervousness in the industry over several issues left unresolved from last season and those resulting from "outside" pressure through large and dramatic changes in West Coast and Alaska fisheries and potential effort shifts. Numerous conversations with industry participants in recent months have expressed several concerns. A brief, but not complete list include:

1. Initiation of an Oregon crab pot limitation system (WA pot limit system started in 1999-00).
2. Concern with the expectation of record pot levels this coming season. Will Oregon set a pot limitation for 2000-01 season?
3. Development of a "control or participation date" for the fishery for any future pot limitation consideration.
4. Increase preseason crab quality sampling in Cape Falcon to OR/CA border area and a start date based on minimum quality criteria.
5. Consideration of "sub area" crab management south of Cape Falcon.
6. Need to review current Oregon crab limited entry system
7. Fear of rapid change in fleet structure and participation due to West Coast Groundfish Disaster and emerging Strategic Plan, major reductions in opportunity in Alaska crab and finfish fisheries, Magnuson-Stevens language related to West Coast Dungeness crab fishery, and increasing "derby fishery" approach to Oregon crab seasons.
8. Need to consider establishment of a crab industry advisory group, representing ports, fleet segments, and processors to discuss issues with ODFW, ODCC and industry on crab issues over the longer term.
9. Initiate PSMFC Tri-state crab process to discuss current issues and existing agreement.
10. Ocean recreational crab fishery, catch, and gear concerns off Oregon.
11. Hire of OFFW shellfish (crab) position at Charleston.

POT LIMITS

Background

Both Washington and Oregon have actively evaluated and considered pot limits in their commercial Dungeness crab fisheries in recent years. Multiple factors have driven this discussion including: Indian treaty sharing (Washington), overcapitalization of pots in each state's fishery, economic destabilization, excessive harvesting pressure on resource, "derby fishery" and short season, safety factors in intense winter fishery, West Coast groundfish disaster declaration and strategic planning to reduce fishery and capacity, effort transfer from Alaska tanner/king crab and groundfish fisheries and West Coast groundfish fisheries, And finally, the industry's increasing fear of an "industrialized fishery" comprised of mostly larger capacity vessels taking most of the product in a short season.

Washington: Washington has taken the lead among West Coast states and developed a pot limitation and "Dungeness Crab Even Flow Harvest Plan" following an extensive public hearing process (began in February 1999). For the 1999-00 season, an initial "place holder" pot limit of 500 pots was implemented by emergency rule in the Washington ocean crab fishery (500 pot limit). On August 11, the Washington Fish and Wildlife Commission adopted a final two-tiered pot limitation plan (300/500 pots) using A base year catch history to qualify Washington (and Oregon and California) fishermen.

Oregon: Oregon consideration of pot limits took shape via Oregon crab industry and House legislative sponsorship of three House bills in the 1999 legislative session (HB 2645, 2646, and a modified HB 2646 following an extensive industry workshop in Salem in early March failed to reconcile different approaches in the two bills. Director Greer requested a Department of Justice opinion on whether the ODFW had authority to set crab pot limits for individual vessels and limit the total number of pots in the fishery (it did). The HB 2646 (as amended) moved forward as a compromise, seeking a more deliberative process, through the Oregon Fish and Wildlife Commission, to discuss pot limits rather than risk a pressured legislative negotiation process. The amended bill had as its main intent, to direct the ODFW to consider the necessity of developing a pot limit system in the Oregon crab fishery and specified a participation date in the fishery for any future consideration (December 1, 1998). The bill died in committee.

Current Oregon Pot Limit Discussion

The final implementation of a pot limitation system in Washington has escalated Oregon's discussion among Oregon fishermen to develop a corresponding Oregon program. The MRP staff discussed and updated the Commission at both their May and October 1999 meetings on this issue.

In October 1999, the Commission gave general direction to the staff to begin a process for developing pot limitation in the Oregon crab fishery and report back to them as appropriate. We are currently evaluating the elements of developing such a system and consulting with the Washington Department of Fisheries and Wildlife (WDFW) staff to exchange information.

Considerations

- Staff has indicated to Commission (Oct. 1999) that a pot limit implementation would be (at least) a two year process with a start date no earlier than December 2001. Washington took about 19 months to complete their process; we have about 14 months, from now, until December 2001-but an easier process potentially. Staff will give status report to the Commission in October and seek guidance, direction to begin process. We hope to have a scoping session with industry advisors prior to the October meeting and have a public hearing at the Newport October meeting.
- We assume that California will not implement a pot limit program prior to Oregon developing such a plan.
- We would develop an Oregon's system recognizing the reality of the Washington pot limit system and need, in some respects, to "match up" with it, for consistency.
- We assume this planing process will take a *lot of staff time* and assorted time from several headquarters licensing and administrative personnel during a period of October 2000 through November 2001 period to meet December 2001 implementation date.
- Other considerations are:
 1. Develop a staff comprehensive technical "backgrounder" document
 2. Develop a time line and schedule for action
 3. Develop a close working partnership with fishermen, processors, ODCC-advisory group, OFWC.
 4. Conduct a series of public workshops to evaluate issues and discuss approaches, in addition to multiple advisory group meetings.
- A suggested schedule for this plan could be something like:
 1. September/October 2000-Discuss with ODCC and crab port advisory committee
-Complete mailing to all permit holders with discussion of issue, potential schedule, background data document
 2. Oct. 2000 - OFWC meeting Oct. 13 at Newport, public testimony, Commission direction and adoption of a process, control date discussion and scheduling
 3. Nov. 2000-Commission takes action to set a "control date" for fishery
 4. Oct. 2000-April 2001 - Public/industry discussion, development of option package
 5. May 2001 - Report to Commission with options for pot limit system-take action
 6. May-Nov. 2001 - Plan & Implement pot limit system in Oregon fishery
 7. December 2001 - Pot limit start date
- Any final pot limit system would require consideration of at least the following:
 1. Multi-tiered pot limit system
 2. Economic analysis prior to adoption-work for ODFW economist Chris Carter
 3. Establishment of "base period" fishery participation to set pot allocations
 4. Develop a pot/buoy tag system
 5. Set a maximum pot size (cubic volume) like Washington
 6. Include all other (California and Washington) permit holders that may qualify.
 7. Develop a one buoy brand number and buoy color scheme per vessel and be registered with Department

PRESEASON CRAB QUALITY TESTING

Background

- Preseason Dungeness crab quality testing has occurred off and on for many years in Oregon and other West Coast states. In the fall of 1996, Directors of the fishery agencies for California, Oregon, and Washington signed a cooperative management agreement (Memo of understanding) for the Pacific Coast Dungeness crab fishery as part of a Tri-State agreement. At-sea and crab testing protocols were set for Oregon/Washington north of Cascade Head, Oregon; later for northern California. Oregon, sampling south of Falcon, was not addressed.
- In 1999, the ODFW, with ODCC and industry assistance, the first ever, significant preseason quality testing south of Cape Falcon due to the great concern of the late summer molting observed. Various locations from Newport south to the OR/CA were tested using a combination of ODFW chartered (cooperating) crab vessels and other contributing industry vessels coordinated with ODCC assistance during the October-November period.
- Crab testing for areas north of Cape Falcon, off Oregon and Washington were found to be suitable to begin the 1999-00 season. Depending on south of Cape Falcon location; however, crab were observed to be of varying meat content and shell hardness during November sampling, although combined crab samples collectively met a minimum criteria, for the combined sampling, for two test parameters (>50% shell hardness and >25% meat "pick out"). Fishermen and processors pointed to other added factors that indicated crab may not be "market-ready," despite the crab meeting shell hardness and meat content criteria.
- The Oregon crab industry desires ODFW to consider substantial at sea sampling and test program for areas south of Cape Falcon prior to the 2000-01 season. They would like the Department to test crab for a "market ready" condition and not open the season before that happens-currently the Director has the option to delay the season. Although the crab industry has prospered for decades without preseason sampling, and generally supported a "hands off" policy on the preseason sampling issue, they now generally support this work given the importance and value associated with the fishery. They want the Department to develop a sizable sampling plan for the 2000-01 season.

Considerations and Options

Three courses of action and planning have been discussed for 2000-01 pre season testing.

Option 1. Status Quo-no ODFW testing program south of Cascade Head. Retain December 1 open date. ODFW Director has option to delay season as per regulations, and industry input.

Option 2. Develop extensive multiple area preseason testing program south of Cascade Head, develop subarea fishing zones from Cascade Head to OR/CA border, and delay season open date in one or more zones, if warranted. Season delay based on consultation of ODFW and industry with date(s) to be determined.

Option 3. Develop a more modest test program, set a specific delayed “default” season open date for entire area south of Cascade or Falcon to OR/CA border if indicated from sampling.

Table 1. Historical effort and catch in the Oregon commercial Dungeness crab fishery, 1947-48 through 1999-00 seasons.

Season	Number of Vessels	Number of Pots	Pounds Harvested	Thousands of Pounds per Boat
1947-48	67	8,000	10,044,000	150
1948-49	35	4,000	9,354,000	267
1949-50	29	4,000	6,252,000	216
1950-51	63	13,600	7,478,400	119
1951-52	83	15,700	5,407,675	65
1952-53	71	13,500	6,413,275	90
1953-54	83	16,200	10,131,125	122
1954-55	89	19,600	6,413,100	72
1955-56	92	18,900	8,910,600	97
1956-57	68	19,200	11,737,800	173
1957-58	75	21,300	10,103,000	135
1958-59	105	21,800	7,125,525	68
1959-60	103	20,600	8,296,125	81
1960-61	110	24,400	11,359,000	103
1961-62	103	38,400	5,813,000	56
1962-63	121	24,600	3,620,975	30
1963-64	95	23,000	3,586,335	38
1964-65	100	22,100	6,221,000	62
1965-66	81	25,000	10,187,000	126
1966-67	87	27,100	9,428,000	108
1967-68	90	28,600	10,215,000	114
1968-69	105	29,200	11,965,000	114
1969-70	143	33,500	13,849,000	97
1970-71	193	49,600	14,735,000	76
1971-72	205	54,900	6,780,000	33
1972-73	310	52,000	3,143,000	10
1973-74	300	50,000	3,462,000	12
1974-75	300	50,000	3,335,000	11
1975-76	220	55,000	9,099,000	41
1976-77	346	68,500	16,301,800	47
1977-78	452	91,400	10,378,600	23
1978-79	444	102,700	16,351,820	37
1979-80	519	98,600	18,242,530	35
1980-81	450	112,500	9,505,818	21
1981-82	458	127,600	8,716,537	19
1982-83	395	104,000	4,327,469	11
1983-84	324	84,000	4,680,013	14
1984-85	317	90,300	4,900,725	15
1985-86	339	91,600	7,142,302	21
1986-87	329	88,700	4,680,464	14
1987-88	327	85,200	8,654,480	26
1988-89	345	91,900	11,163,330	32
1989-90	452	151,400	9,256,730	20
1990-91	368	86,426	8,248,017	22
1991-92	374	94,826	7,547,596	20
1992-93	354	102,310	10,863,817	31
1993-94	386	111,887	10,343,000	27
1994-95	425	114,150	15,050,590	35
1995-96	346	124,483	17,696,936	51
1996-97	332	122,396	7,037,181	21
1997-98	311	113,238	7,086,053	23
1998-99	306	116,421	9,114,029	30
Historic Average	235	60,737	8,879,899	63
Most Recent 10 Yr Avg.	365	113,754	10,224,395	28
1999-00 as of 8/15/00	325	134,101	15,616,728	48

Table 2. Summer (June 1 - August 14) participation and landings in the Oregon commercial Dungeness crab summer fishery, 1984-85 through 1999-00

Season	Season Total Number of Vessels	Number of Summer Vessels (6/1-8/14)	Percent of Fleet in Summer Fishery	Number of Vessels Landing in June	Number of Vessels Landing in July	Number of Vessels Landing in August	Average Number of Summer Deliveries per Vessel
84-85	318	113	36%	102	74	50	7
85-86	339	81	24%	71	52	30	8
86-87	330	85	26%	70	60	52	9
87-88	330	92	28%	72	47	45	7
88-89	345	90	26%	69	58	45	9
89-90	454	135	30%	102	87	78	10
90-91	367	135	37%	108	102	94	11
91-92	374	138	37%	103	114	93	11
92-93	354	122	34%	84	103	91	13
93-94	386	142	37%	127	107	96	12
94-95	424	173	41%	127	131	101	10
95-96	346	147	42%	120	116	100	10
96-97	331	113	34%	88	80	71	9
97-98	314	112	36%	84	74	66	14
98-99	306	135	44%	121	86	61	7
99-00	325	152	47%	126	127	38	8

Season	Pounds Landed in Summer Fishery (6/1-8/14)	Percent of Pounds Landed in the Summer Fishery	Number of Summer Deliveries	June Landings in Pounds	July Landings in Pounds	August Landings in Pounds
84-85	162,293	3%	736	66,930	49,072	46,291
85-86	224,076	3%	646	108,697	72,523	42,856
86-87	319,025	7%	786	89,247	147,485	82,293
87-88	351,707	4%	643	143,986	137,713	70,008
88-89	528,175	5%	832	187,504	239,226	101,445
89-90	542,162	6%	1,389	177,542	221,934	142,686
90-91	555,781	7%	1,435	184,387	234,626	136,768
91-92	809,322	11%	1,540	206,182	346,772	256,368
92-93	960,839	9%	1,559	224,876	379,469	356,494
93-94	885,060	9%	1,685	202,537	372,064	310,459
94-95	681,977	5%	1,652	185,773	283,825	212,379
95-96	604,756	3%	1,505	258,553	210,026	136,177
96-97	364,571	5%	1,044	68,422	154,641	141,508
97-98	449,661	6%	1,538	48,744	220,574	184,502
98-99	202,936	2%	1,002	122,033	49,788	31,115
99-00	441,118	3%	1,145	221,278	194,644	25,196

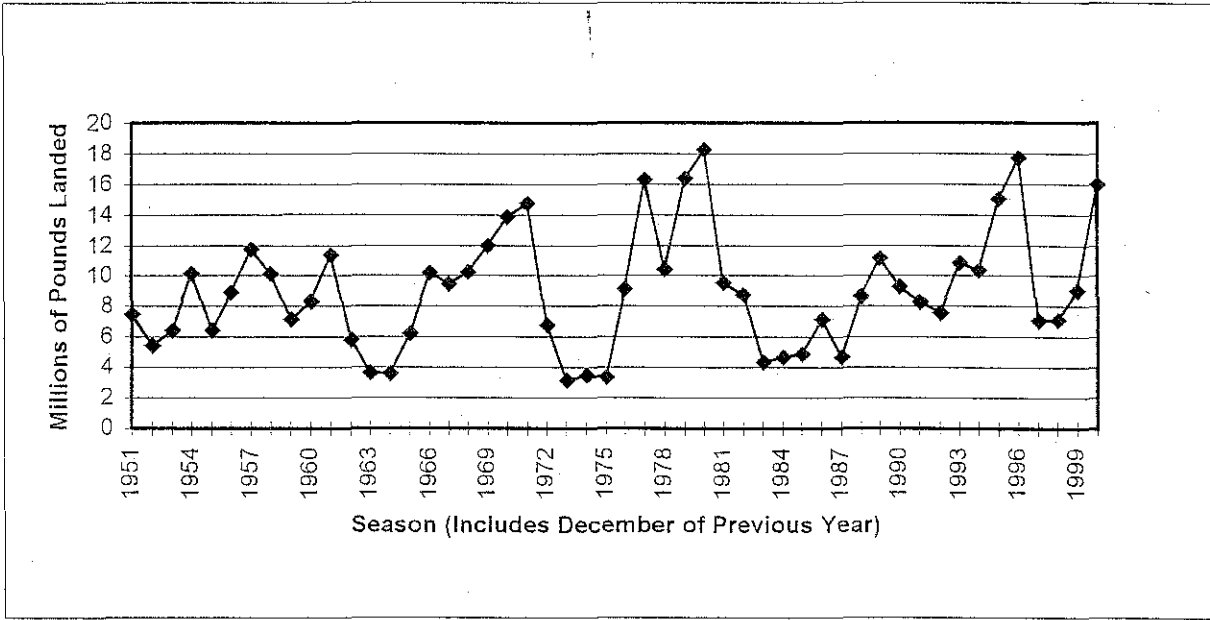


Figure 1. Total seasonal landings in the Oregon commercial Dungeness crab fishery, 1951-2000

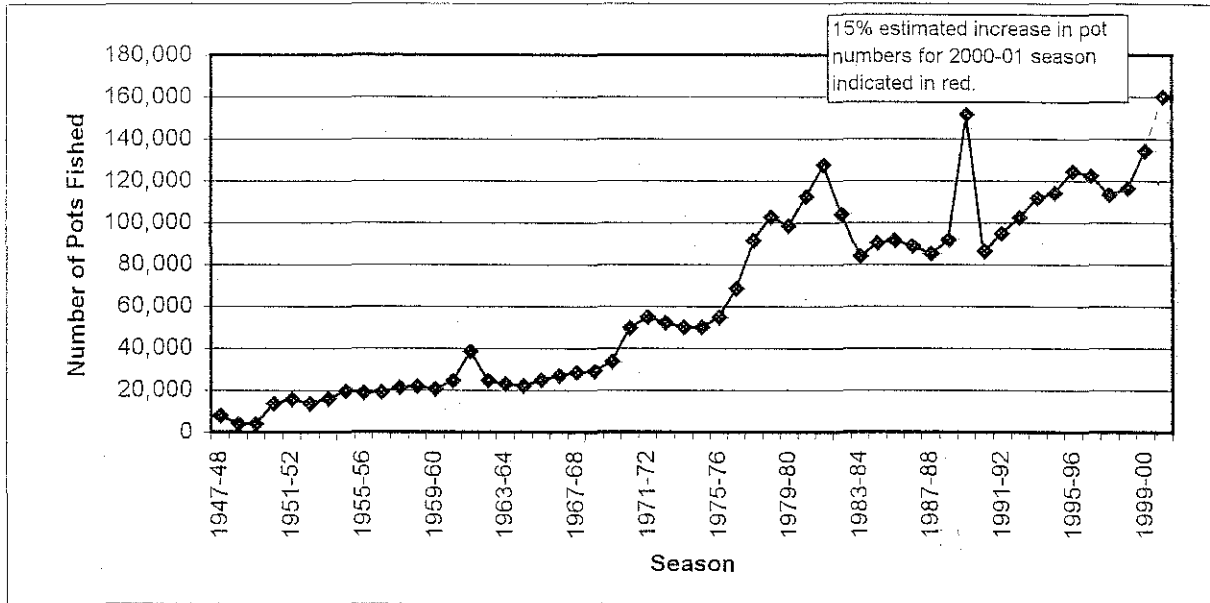


Figure 2. Commercial crab pots "declared" to be fished by fisherman from vessel hold inspections at the start of each season in Oregon commercial Dungeness crab fishery, 1948-2000. Dotted line represents a "reasonable" expectation for increase for 2000-01 fishery.

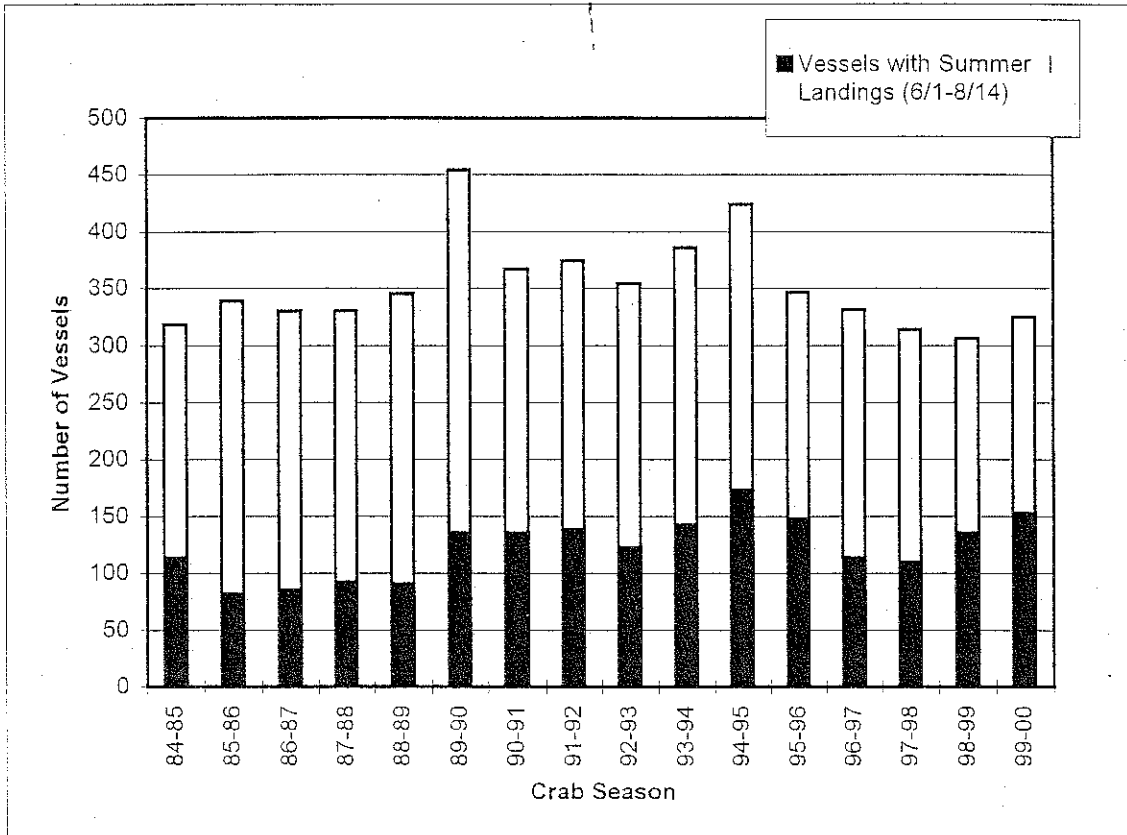


Figure 3. Numbers of commercial vessels landing Dungeness crab in Oregon, 1984-85 through 1998-99 seasons

Table 3.

Preliminary totals for 1999-2000 Oregon Crab Season			
as of 8/15/2000			
Month	Pounds	Value	Average Price
Dec-99	8,813,381	\$15,306,184	\$1.737
Jan-00	3,525,027	\$7,659,313	\$2.173
Feb-00	1,325,077	\$3,131,019	\$2.363
Mar-00	667,922	\$1,677,119	\$2.511
Apr-00	483,954	\$1,352,657	\$2.795
May-00	360,249	\$1,084,032	\$3.009
Jun-00	221,278	\$594,066	\$2.685
Jul-00	194,644	\$452,553	\$2.325
Aug-00	23,996	\$47,391	\$1.975
Season Total to date	15,615,528	\$31,304,334	\$2.005
a/ July and August estimates are probably incomplete, including only fish tickets on the system as of 8/15/2000.			