

ADF&G SALMON FORECASTS SHOW RECOVERY, BUT ARE BELOW RECENT HIGHS

The Alaska Department of Fisheries and Game (ADF&G) recently released its harvest projections for the state's 2009 salmon fisheries. The agency predicts a statewide, all-species harvest of 175 million fish, an increase of 34% from the 2008 harvest of 146 million fish. This includes an increase of 29 million pinks, due more to that species' two-year spawning cycle than to the run's strength (see below). The boost in pink harvests masks a reduction of one million fish in sockeye harvests.

NOTE: ADF&G has yet to release its 2009 for the Southeast chinook fishery (240,000 fish caught in 2008). Once updated, the chinook forecast will likely show an improvement over the 2008 harvest.

ALASKA COMMERCIAL SALMON HARVEST BY SPECIES, 2005-2009						
all figures in '000s of fish						
Species	Harvest				Projection	Change
	2005	2006	2007	2008	2009	2008-2009
Chinook	699	645	571	344	250	(94)
Sockeye	43,387	41,649	47,468	39,121	38,167	(954)
Coho	4,821	4,428	3,642	4,419	4,678	259
Pink	161,237	72,808	144,087	84,091	113,198	29,107
Chum	11,760	21,532	17,244	18,212	18,559	347
Total	221,904	141,062	213,012	146,187	174,852	28,665

Pinks

Pink salmon in Alaska follow a two-year spawning cycle. In general the odd-year runs are much greater than those in even years. Therefore we evaluate pink salmon harvests on a two-year basis:

ODD-YEAR HARVESTS OF ALASKAN PINK SALMON, 1999-2009								
all figures in '000s of fish								
Species	Harvests						Projection	% Difference
	1999	2001	2003	2005	2007	5-year avg	2009	2009 vs. avg
Pink salmon	145,990	127,620	124,251	161,237	144,087	140,637	113,198	(19.5%)

Although it is much higher than the 2008 harvest, the 2009 projection of 113 million fish is 20% lower than the average of the last five odd-year harvests.

Sockeye

Sockeye are by far Alaska's most economically important salmon species. For example in 2007, the state's sockeye fisheries produced only 23% of its total salmon harvest, but generated 54% of ex-vessel value. Bristol Bay produces the bulk of the salmon harvest.

For 2008, ADF&G had predicted a fourth consecutive year of state sockeye harvests exceeding 40 million fish. But due to a slight decrease in run size and a late breakup of the winter ice, the Bristol Bay fishery harvested 15% fewer fish than expected. The resulting statewide harvest of 39 million fish was still high in historical terms.

ALASKAN SOCKEYE SALMON HARVESTS BY AREA, 2004-2009								
all figures in '000s of fish								
Area	Harvests						Projection	% Difference
	2004	2005	2006	2007	2008	5-year avg	2009	2009 vs. avg
Bristol Bay	26,265	24,525	28,493	29,463	27,756	27,300	23,990	(12.1%)
Other	18,574	18,862	13,156	17,609	11,365	12,681	14,177	11.8%
Total Alaska	30,912	44,839	43,387	41,649	39,121	39,982	38,167	(4.5%)

ADF&G predicts that after four years of strong harvests, the Bristol Bay harvest will contract by 12% in 2009 to approximately 24 million fish. A projected 12% increase in the state's other sockeye fisheries

will somewhat compensate for the lower Bristol Bay harvest, although the sum will still be a 5% drop in statewide sockeye harvests.

As this relates to prices, Bristol Bay fish are generally among the least expensive of the state's sockeye. Therefore a net estimated drop of 5% in sockeye supplies is unlikely to place much supply-side pressure on sockeye prices. On the demand side, the current global recession will likely weaken prices for all salmon species.

Harvests by area

By area and species, here are the full 2009 projections:

ALASKA SALMON COMMERCIAL HARVEST PROJECTIONS 2009							
all figures in '000s of fish							
Region	Area	Species					
		Chinook	Sockeye	Coho	Pink	Chum	Total
Southeast		n/a	1,465	2,523	42,230	10,000	56,218
Central	Prince William Sound	53	1,860	710	37,877	3,426	43,926
	Upper Cook Inlet	20	3,000	210	70	80	3,380
	Lower Cook Inlet	1	300	14	998	45	1,358
	Bristol Bay	83	23,990	79	1	1,535	25,688
	Total Central	157	29,150	1,013	38,946	5,086	74,352
Westward	Kodiak	20	1,668	418	22,200	623	24,929
	Chignik	2	632	91	1,598	117	2,440
	South Alaska Pen.	6	2,212	185	8,073	840	11,316
	North Alaska Pen.	7	2,800	70	50	150	3,077
	Total Westward	35	7,312	764	31,921	1,730	41,762
AYK		58	240	378	101	1,743	2,520
Total Alaska		250	38,167	4,678	113,198	18,559	174,852

AYK: Arctic, Yukon, Kuskokwim region

The projections for the major species-area fisheries suggest:

- Southeast pinks – a strong recovery from only 16 million fish caught in 2008.
- Southeast chums – a fourth consecutive year of above average harvests.
- Bristol Bay sockeyes – a drop from 28 million fish in 2008 to 24 million in 2009.
- Kodiak pinks – after a poor harvest in 2008, a strong harvest of 22 million fish in 2009.

Sources: ADF&G

Implications for frozen seafood buyers:

- Despite the projected increase in pink salmon harvests, the 5% drop in sockeye salmon harvests will have the greatest effect on the salmon market.
- The global recession will put downward pressure on salmon prices after several years of steady inflation.

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