Scallop Report

NEFMC Meeting
Freeport, Maine
June 25, 2025

New England
Fishery Management Council

Plan for today

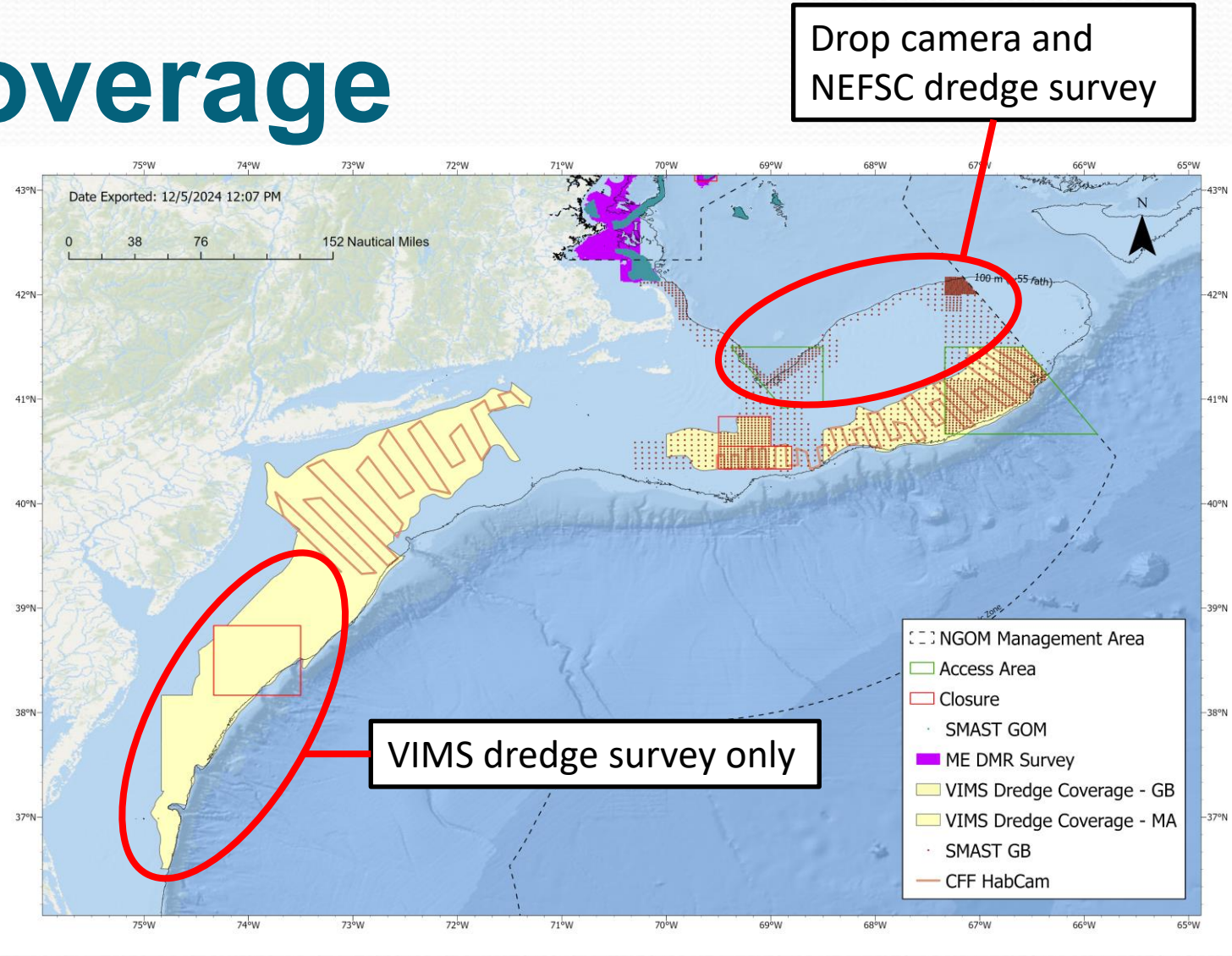
- Update on 2025 Scallop Surveys
- Update on discussion to revise administration of the Scallop Research Set-Aside program
- Update on FY2025 fishery performance
- Update on progress toward 2025 scallop work priorities

Council Action:

- Initiate Framework Adjustment 40.
  - Setting scallop fishery specifications for FY2026 and FY2027 (default)

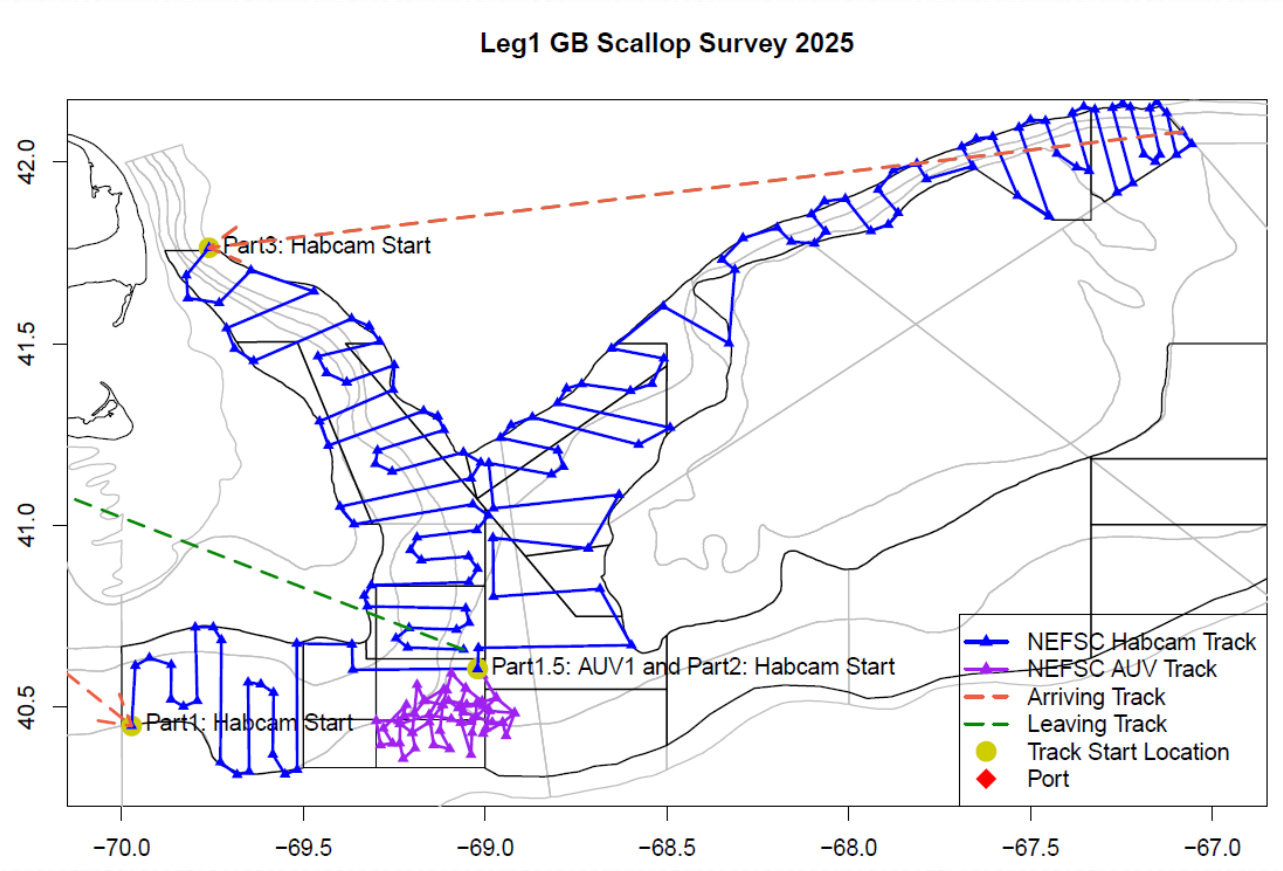
2025 Survey Coverage

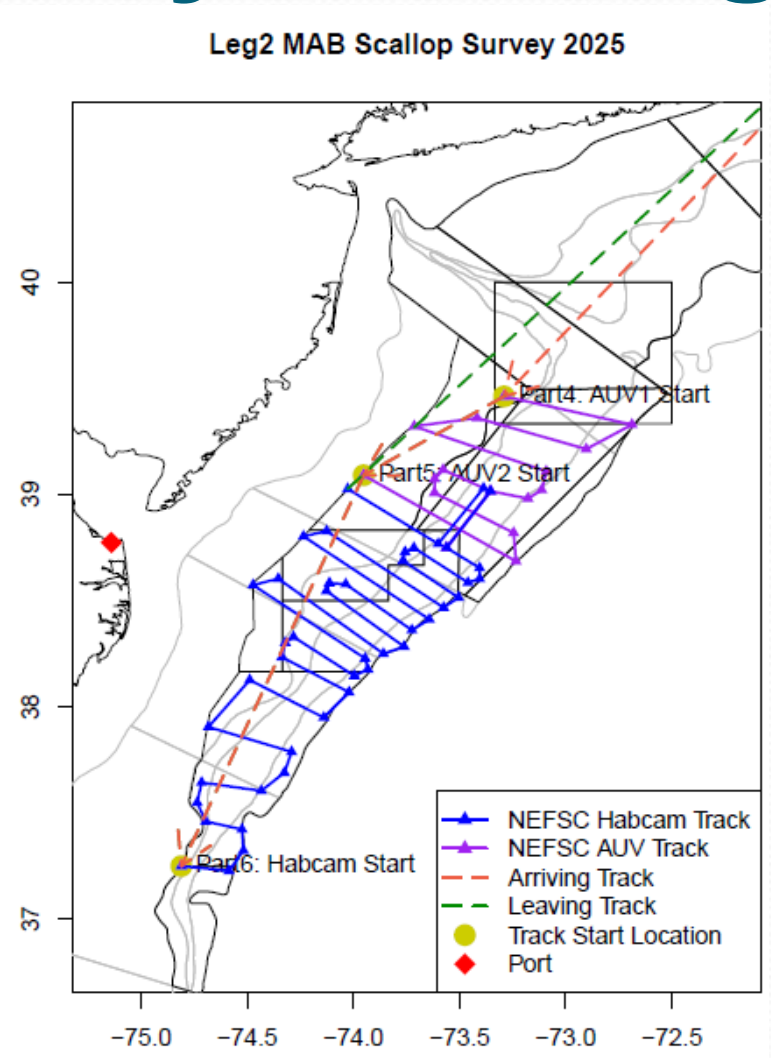
- 2025 surveys are underway!
- RSA Survey Coverage
  - VIMS dredge coverage in NLS region, Area II, Southern Flank, and Mid-Atlantic
  - SMAST drop camera survey of GB, including high resolution in NLS-North and NLS-South, Area II, and Northern Edge
  - CFF HabCam coverage of northern Mid-Atlantic, NLS-South, Southern Flank, Area II
  - ME DMR dredge coverage of Stellwagen
  - Bank, NGOM exploratory areas, MSI



Note: Drop Camera stations and HabCam tracks are approximate

Intended HabCam survey coverage





Scallop Research Set-Aside

- May 7 & 8, Scallop Research Share Days
  - 12 presentations, 66 total attendees
  - Presenters covered wide array of topics, including gear modifications, industry-collected data, scallop enhancement, scallop feeding ecology, offshore wind impacts, scallop age structure, seed scallop habitat preferences, survey design, and the economic and wellbeing of the IFQ component.
- 2025 Scallop RSA awards were received by award recipients on May 22
  - 2025 RSA surveys are currently on the water and proceeding on schedule
- 2026 Notice of Funding Opportunity (NOFO) is currently delayed

Scallop RSA administration

Rationale for change

- April Council request to develop alternative administrative management ideas for the Scallop RSA program given potential uncertainties
  - Desire to avoid worst case scenario where no NOFO is issued, no grant competition occurs, and no surveys are funded
  - Other issues around administrative delays stemming from grants process that negatively impact RSA recipient organizations, timing of surveys, and specifications setting process

Scallop RSA administration

Discussion since April Council meeting

- Council staff have met with GARFO staff on April 25 & June 12 to consider options
- **Grant → Exempted Fishing Permit (EFP)**
  - RA has authority to issue EFP for compensation fishing. Potential legal obstacles and other considerations with moving away from issuing a 'grant'.
  - Potential to award something other than 'scallop pounds', such as days-at-sea or increased possession limits
  - Not a short-term solution

Scallop RSA administration

Discussion since April Council meeting

- Council staff have met with GARFO staff on April 25 & June 12 to consider options
- **Multi-year RSA competition**
  - Relatively easy to implement and would not require a regulatory change
  - Reduces burden on Council staff, GARFO staff, and RSA recipients during off year
  - RSA priorities and awards are already multi-year, could align NOFO to follow RSA priority-setting process
  - Could allow for set-aside to be reduced in Year 2 as required funding would be known

FY2025: NGOM

- Northern Gulf of Maine open from April 1 – April 11, and again from April 21 - April 27 after FW39 Final Rule published.
  - 200 vessels participated, 178 trips per day on average, 643k pounds landed (95.4% of set-aside)
  - ~1/3 of harvest from IFQ permitted vessels

VTR State	VTR Port	LGC B (MEATS)	LGC B ($)	LGC A (MEATS)	LGC A ($)
MA	GLOUCESTER	336,316	11,578,630	85,003	2,949,411
MA	PROVINCETOWN WHARF	1,600	50,100	65,205	1,963,845
MA	SCITUATE (SCITUATE CENTER)	0	0	15,892	466,191
MA	NEW BEDFORD	4,928	178,166	12,055	423,762
MA	SANDWICH (SANDWICH CENTER)	0	0	5,916	224,041
MA	BOSTON	34,302	1,246,451	6,712	218,569
MA	PLYMOUTH	0	0	4,250	101,243
MA	ROCKPORT	8,909	303,998	0	0
MA	CHATHAM (CHATHAM CENTER)	0	0	600	0
ME	PORTLAND	1,197	29,894	0	0
OTHER	OTHER (Ports w/ < 3 vessels)	6,077	120,515	14,528	426,236

Stellwagen Bank

FY2025: Fishery Performance

Reminder: FT LA 24 DAS and 2 x 12k lb access area trips
- **1 in Area I, 1 in Area II**

For data reported through 2025-06-15
Quota Period: *2025*
Quota period dates: *April 1, 2025 to March 31, 2026*

Limited Access sub-ACL

	OPEN	CA I	CA II	NYB	MONTHLY TOTAL	CUMULATIVE TOTAL	% OF SUB-ACL (35,031,453 lb)	% OF APL (17,041,733 lb)	Observer Set Aside
April	1,014,956	0	118,113	141,786	1,133,069	1,133,069	3.23%	6.65%	19,790
May	2,459,618	5,760	277,831	236,394	2,743,209	3,876,278	11.07%	22.75%	46,357
June	282,710	0	0	15,010	282,710	4,158,988	11.87%	24.4%	6,112
TOTAL	3,757,284	5,760	395,944	393,190	4,158,988				72,259

Limited Access General Category sub-ACL

	OPEN	CA I	CA II	NGOM	MONTHLY TOTAL (ACL)	CUMULATIVE TOTAL (ACL)	% OF SUB-ACL (1,854,088 lb)	CUMULATIVE TOTAL (APL)	% APL (901,691 lb)	Observer Set Aside
April	35,520	199		231,671	35,719	35,719	1.93%	267,390	29.65%	3,900
May	124,292	25,667		600	149,959	185,678	10.01%	417,949	46.35%	1,100
June	14,368	21,954	4,137	0	40,459	226,137	12.2%	458,408	50.84%	400
TOTAL	174,180	47,820	4,137	232,271	226,137					5,400

Limited Access DAS used

April: 902 DAS (12%)

May: 1,865 DAS (24%)

June: 608 DAS (8%)

6% of DAS remaining*

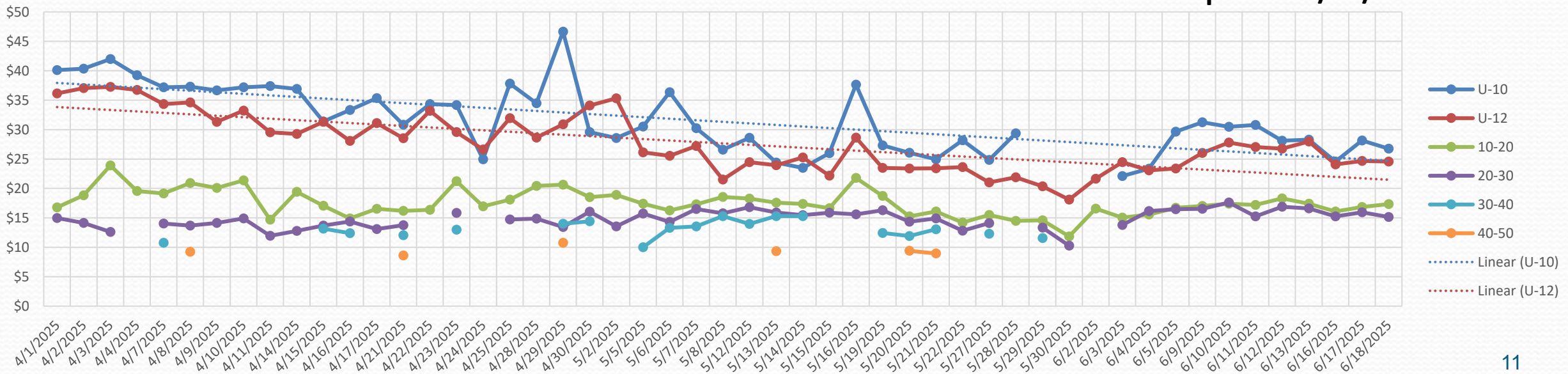
*Not including observer compensation or carryover DAS

Area I. Capt. Brady Lybarger

FY2025: Fishery Performance

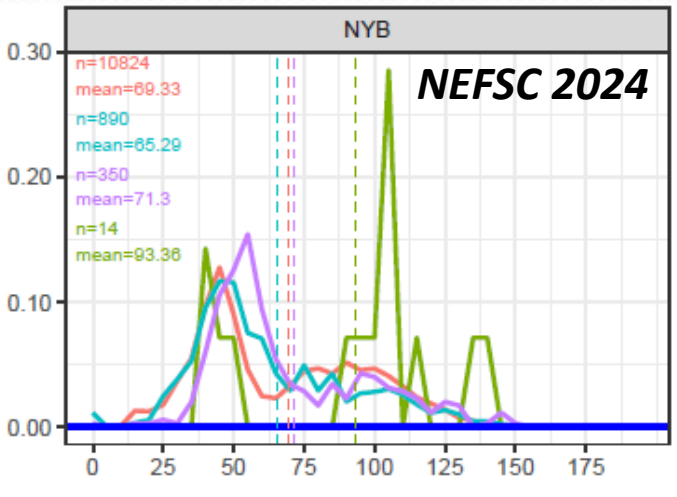
	Landings (lb)						
Row Labels	Area I	Area II	Channel	Georges Bank	Gulf of Maine	Mid-Atlantic	New York Bight
U-10	1,372	58,984	55,004	15,405	150,403	18,569	16,799
U-12	24,447	88,465	414,946	37,704	206,587	91,240	12,952
10-20	157,673	285,670	2,186,744	240,473	33,164	209,268	98,464
20-30	17,370	40,999	239,520	289,215	1,716	51,816	46,145
30-40	469	2,411	3,632	49,373			
40-50	211		361	6,090			
Grand Total	201,542	476,529	2,900,207	638,260	391,870	370,893	174,360

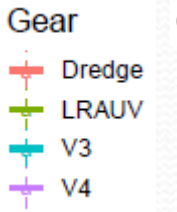
Updated 6/18/25

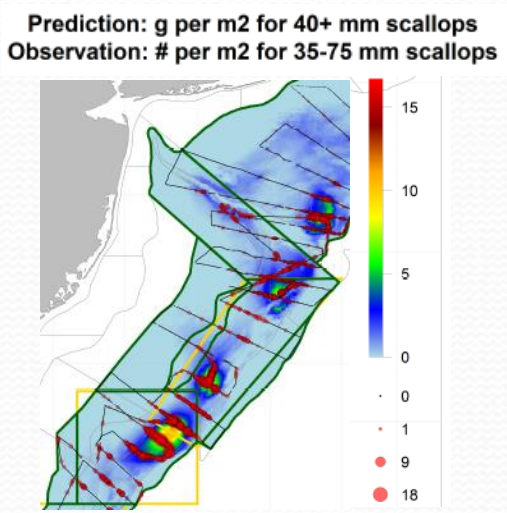


New York Bight

- 2024 carryover trips in the northeast NYB encountered concentrations of juveniles – area reverted to open bottom on May 31.
- Reported improved meat quality and yield relative to 2024.
- Industry has expressed an interest in pursuing an emergency closure of the area to protect seed.







Source: Drew Minkiewicz, SSF

NLS-West

- Catch rates of 4,000-5,000 lb per day of mostly U-10, 10-20s, in roughly 10 nm^2
- 134 vessels total vessels were active in area
- Was this signal picked up on by surveys?

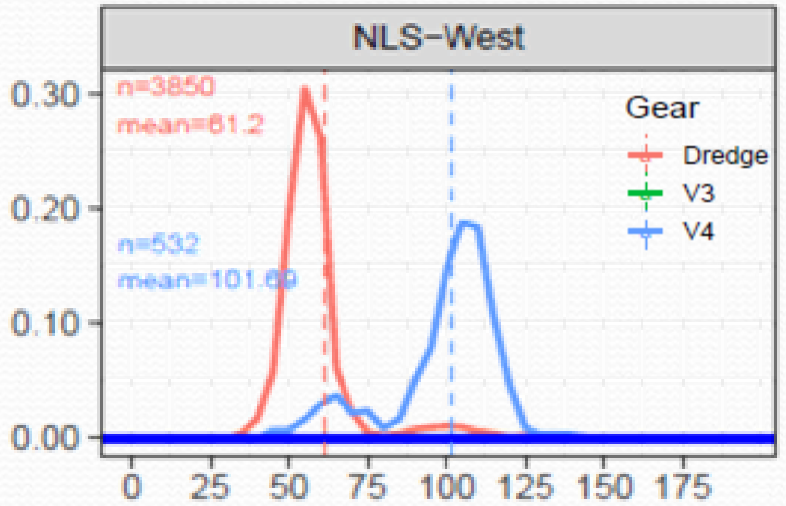
2024 Survey	Abundance	Biomass	Biomass SE	Mean Wt
Habcam	140 million	3,011 mt	11 mt	21.5 g
Drop camera	159 million	3,799 mt	4,028 mt	23.9 g
Dredge	110 million	878 mt	45 mt	**8.0 g**
Mean	136 million	2,563 mt	1,343 mt	21.5 g

NLS-West. Capt. Brady Lybarger

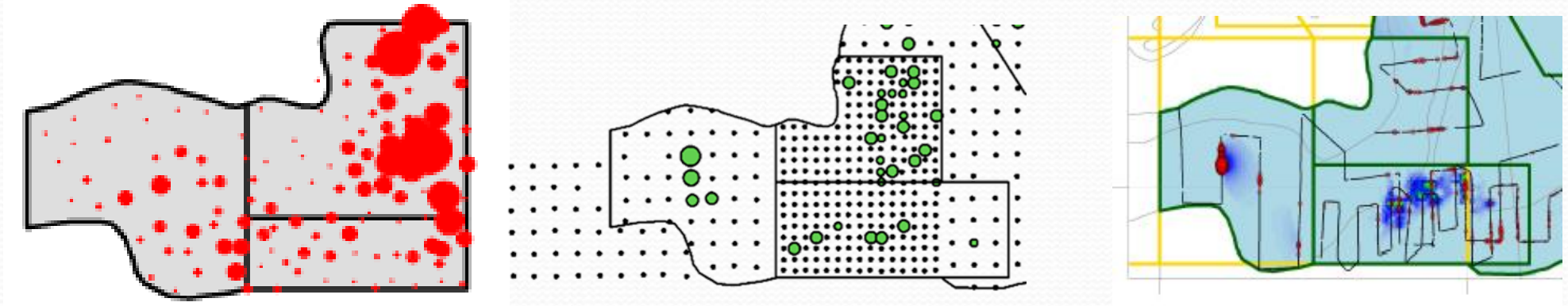
NLS-West

- Dredge survey average meat weight much lower than optical surveys
- Dredge survey length-frequencies scaled to match mean survey biomass estimate for each area in the SAMS model, leading to an underestimated projection of 2025 exploitable biomass in the NLS-W.

NEFSC 2024



>75mm densities, Dredge (left), Drop camera (center), HabCam (right)



NLS-West

- Scallop PDT will discuss a protocol for treatment of similar areas with large differences in dredge/optical surveys length frequencies for 2026 projections.

Could these additional landings lead to the fishery exceeding catch limits?

Limited Access Catch Target (ACT) = **30.4 million pounds**

Limited Access Projected Landings (APL) = **17.0 million pounds**

Buffer between ACT and APL = **13.4 million pounds**

NLS-West/Channel landings = **~3.8 million pounds**

Scallop outlook by quarter in 2025

Key: Scallop led project | NMFS led project, with Staff and/or PDT involvement | Possible follow-up and/or implementation

Calendar Year	Jan – Mar	Apr - Jun	July - Sept	Oct - Dec
Framework 39	Preliminary and Final Submission			
FY 26/27 Specifications		2025 Field Season	Framework 40: 2026/2027 (default) Specifications	
Annual Scallop RSA Work	Award Decisions	Announce Awards; Share Day; Awards made	NOFO; NOFO Closes	Proposal Reviews; Award Decisions
2025 Research Track Assessment	Working Group Participation	Incorporate new stock reference points		
LAGC IFQ Program Review	WG meetings, conduct analyses	Report assembly and writing	Review draft, final report approved at NEFMC	
Strategic Plan	SWOT analysis; Visioning sessions	Review input, iterate with AP/CTE/Council, draft Strategic Plan		Approval at NEFMC

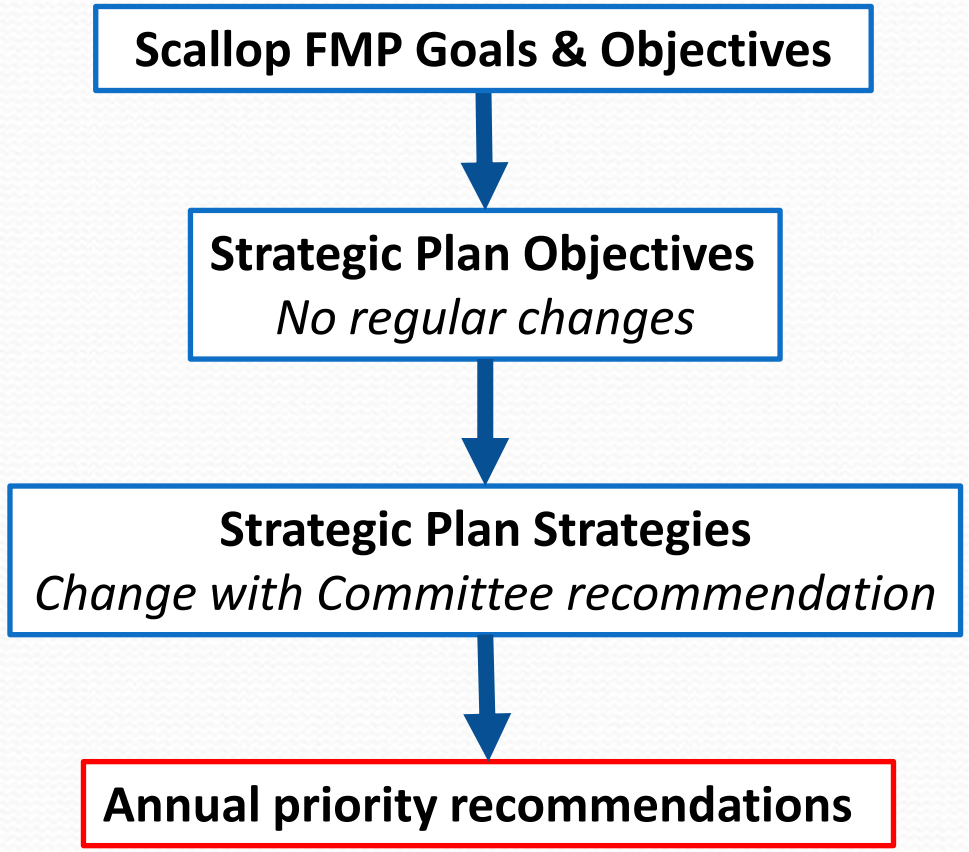
1. **Strategic Plan Roadmap (Doc 2a)**
2. **Goals and objectives of the Scallop FMP & subsequent actions (Doc 2b)**

Strategic Plan

- Will not be holding additional public outreach meetings – although may solicit public comment on draft plan.
- PDT to work on draft plan through Summer 2025, with regular updates to AP and Committee.
- Final approval of Strategic Plan in December 2025

Strategic Plan Process	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Council Meetings											
Visioning sessions and initial public input											
Council to consider all input and guide development of draft Strategic Plan											
Develop draft Strategic Plan											
Council approves final Strategic Plan											

Strategic Plan Roadmap



- Objectives should stay consistent overtime, but could be modified if needed
- Strategies could be modified more regularly (annually or biennially)
- Annual priority recommendations would not be limited to those listed within the Strategic Plan

Strategic Plan Objectives

Strategy 1.1

Strategy 1.1 - Increase the capacity for and use of real-time data collection and monitoring in management, including industry-collected data, VTRs, auction data, LPUE, and other data sources.	
Possible management measures	None expected
Management action required	None expected
Type of NEPA analysis expected (CE/SIR/EA/EIS)	None expected
Possible analyses	Support independent efforts to create a uniform, efficient reporting platform for industry-collected data
	Continue support for current industry-based data collection, including the Pilot Research Fleet and ScalApp projects
	Develop QA/QC standards for industry-collected data for use in management decision-making
	Create a decision-support tool to communicate data more effectively
Data or research needs	
Work led by	Scallop PDT and RSA
Expected duration of work	
Potential challenges	Potential data sharing challenges that could require data-use agreements
Other notes	

Strategy 1.2

Strategy 1.2 - Develop a Management Strategy Evaluation model based on an understanding of scallop population dynamics, biological and oceanographic conditions, and fishery behaviors to inform Best Management Practices, including addressing ocean use conflict (e.g., offshore wind farms) changing resource distribution (e.g., related to climate change), and allocation scenarios (e.g., consolidated fishing fleets).	
Possible management measures	None expected
Management action required	None expected
Type of NEPA analysis expected (CE/SIR/EA/EIS)	None expected
Possible analyses	Define scope of the MSE model
	Review existing MSE models used in other regions
Data or research needs	Social science data (conceptual modeling) to understand fishery behavior, scallop species distribution model, oceanographic model.
Work led by	Outside contractor and reviewed by Scallop PDT and SSC, conceptual modeling would involve industry engagement.
Expected duration of work	
Potential challenges	
Other notes	

Strategy 1.3

Strategy 1.3 - Separate management of the Mid-Atlantic and Georges Bank resources, with individual OFL/ABCs and DAS separately allocated.	
Possible management measures	Allocate Limited Access DAS in the Mid-Atlantic separately from Georges Bank, allowing trading of DAS.
	Revise Scallop ABC control rule to allow for separate OFL and ABC for Georges Bank and Mid-Atlantic for setting annual specifications.
Management action required	Framework or Amendment
Type of NEPA analysis expected (CE/SIR/EA/EIS)	EA or EIS
Possible analyses	Evaluate ability to set catch based on Mid-Atlantic and Georges Bank references points separately within current regulations
	Develop method to track DAS separately between the Mid-Atlantic and Georges Bank
Data or research needs	
Work led by	Scallop PDT and reviewed by SSC
Expected duration of work	
Potential challenges	
Other notes	

Strategy 1.4

Strategy 1.4 - Streamline the annual specifications setting process to increase capacity for addressing other fishery management challenges.	
Possible management measures	Unknown
Management action required	Unknown
Type of NEPA analysis expected (CE/SIR/EA/EIS)	Unknown
Possible analyses	Evaluate available tools within the Scallop FMP, including setting 2-year specifications in place of a default, and using a Supplemental Information Report (SIR) for annual specifications actions
Data or research needs	
Work led by	Scallop PDT, Council staff
Expected duration of work	
Potential challenges	
Other notes	Likely overlap with Management Flexibility Action

Strategy 1.5

Strategy 1.5 - Develop tools within the Scallop FMP to allow for in-season management	
Possible management measures	Allow for closures of access areas based on a pre-defined trigger, such as LPUE.
Management action required	Framework or Amendment
Type of NEPA analysis expected (CE/SIR/EA/EIS)	EA
Possible analyses	Review in-season management tools used in other FMPs, such as Atlantic Herring
	Evaluate measures that would improve management outcomes by being implemented quickly in-season, such as closures of access areas or opening of rotational closures
	Evaluate monitoring tools that can be used in-season or other data sources that could provide additional data to support in-season management decisions
Data or research needs	
Work led by	Scallop PDT
Expected duration of work	
Potential challenges	
Other notes	

Strategy 1.6

Strategy 1.6 - Revise the Limited Access DAS carryover provision to reduce uncertainty in open-bottom harvest.	
Possible management measures	Reduce carryover provision from 10 DAS to 5 DAS.
	Set carryover DAS to a proportion of the annual DAS allocation.
Management action required	Framework
Type of NEPA analysis expected (CE/SIR/EA/EIS)	EA
Possible analyses	Evaluate DAS carried over in recent years and the resulting amount of catch relative to annual projections of open-bottom landings.
Data or research needs	Time series of total DAS used, carried over, and forfeited
Work led by	Scallop PDT
Expected duration of work	Could be completed within annual Framework action
Potential challenges	
Other notes	

Strategy 1.7

Strategy 1.7 – Disperse fishing effort in high-density areas to reduce incidental mortality and vessel crowding.	
Possible management measures	Implement a trip limit on directed scallop trips fishing on a DAS
Management action required	Framework
Type of NEPA analysis expected (CE/SIR/EA/EIS)	EA
Possible analyses	Evaluate the effect of an open-bottom trip limit on fishing practices, such as high-grading
	Develop an appropriate open-bottom trip limit
Data or research needs	
Work led by	Scallop PDT
Expected duration of work	
Potential challenges	
Other notes	

Input on the Strategic Plan

- How would this product be most useful for recommending work priorities?
  - Objectives, strategies, possible management measures – do these sufficiently address all 3-5 year needs of the Scallop FMP based on visioning input and public comment?
  - Input on sequencing and batching of strategies and management measures, whether to prioritize objectives, or any noteworthy challenges or other considerations?
  - Other types of information that would be helpful to consider?

Next steps

- Further development of Strategic Plan Roadmap document
- Document all previous Council work and discussion relevant to each Strategy, to be included as a supplemental document
- Develop template for evaluating management progress towards each objective
- Consider ways to solicit public comment on draft Strategic Plan before final approval
- Final approval in **December 2025**

LAGC IFQ Program Review

Has the LAGC IFQ program…

- Resulted in benefits to the Nation, including the evaluation of biological, economic and social criteria in such decision making?
- Preserved the ability for vessels to participate in the general category fishery at different levels and/or prevented excessive shares?
- Controlled capacity, controlled mortality, and promoted fishery conservation and management?
- Promoted fishing safety, compliance, and enforcement?

Timeline

Date	Task
February 2024	Project Planning and Internal Work.
March 2024	Request to NMFS for project support, resources
April 2024	Form working group, review scope and work plan
May 2024	First meeting of the working group
June 2024	Update to Council
July 2024	Begin assembling data for analysis (2023 fishing year)
December 2024	Continue work on analyses
April 2025	Council update, continue work on analyses
June 2025	**Council Reviews preliminary analyses**
September 2025	Council Approves Final Report (Need a vote!)

LAGC IFQ Review: Analyses

1) Analyses Completed so far

- Fleet Characteristics
- Quotas
- Leasing
- Fishing effort
- Productivity
- Economic performance
- Crew income
- Quota distribution
- Species distribution
- Crew survey comparative analysis

2) Analyses in Progress

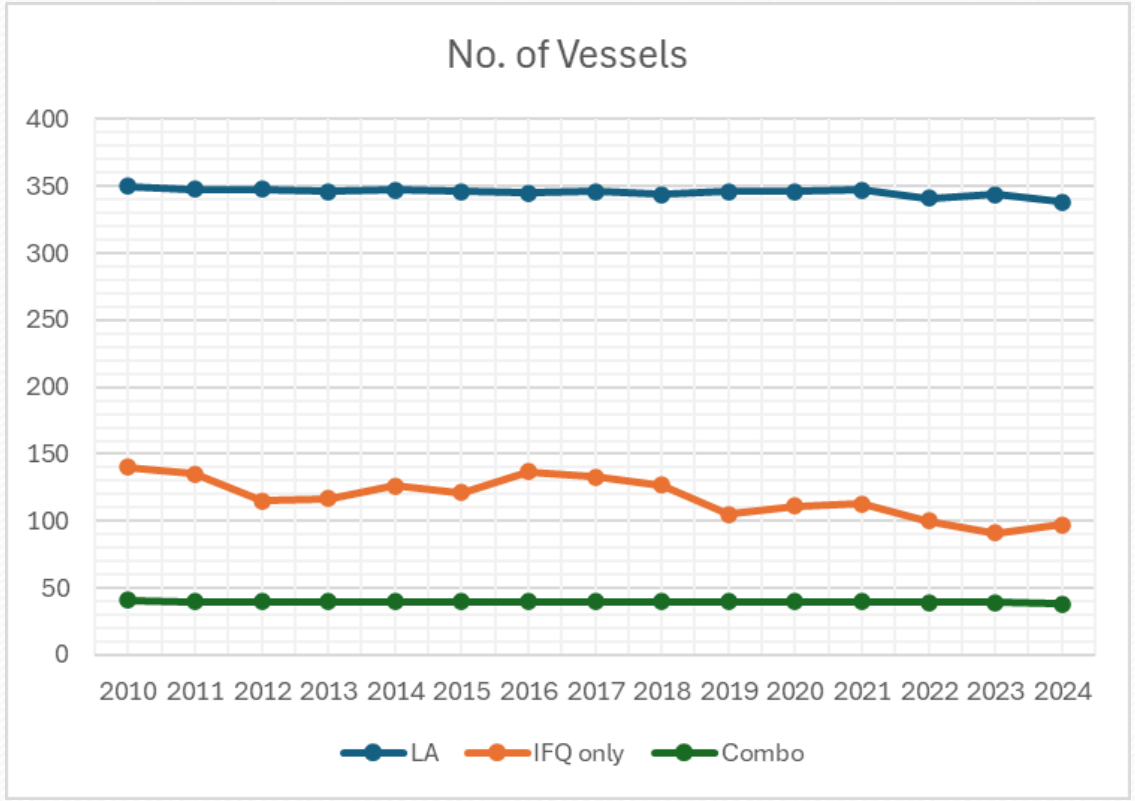
- Distributional Analyses:
  - Distribution of landings, quota, and revenues by affiliations
- Conservation and Management
  - Stock status
  - Allocation and landings
  - LPUE
  - Bycatch
- Safety, Compliance, and Enforcement
  - Compliance with IFQ allocations
  - Compliance based on VMS reports
  - Enforcement: monitored offloads
  - Enforcement: Violations
  - Safety: Average vessel age and fishing allocations

Trends

- Number of IFQ permits ↓
  - Fewer vessels in IFQ fleet -> likely due to one-way transfers to NGOM
- Quota, landings, and overall revenue ↓
  - Concentration of revenue -> fewer vessels in fleet = more $ at individual level
  - Northward shift in resource leading to decline in Mid-Atlantic IFQ landings/revenue
- Proportion of the fleet leasing ↑
  - Evidence of consolidation of IFQ among fewer permit-holders
- More vessels are relying 100% on scallops ↑
- Crews are younger and less involved in management, but are more satisfied with jobs than before

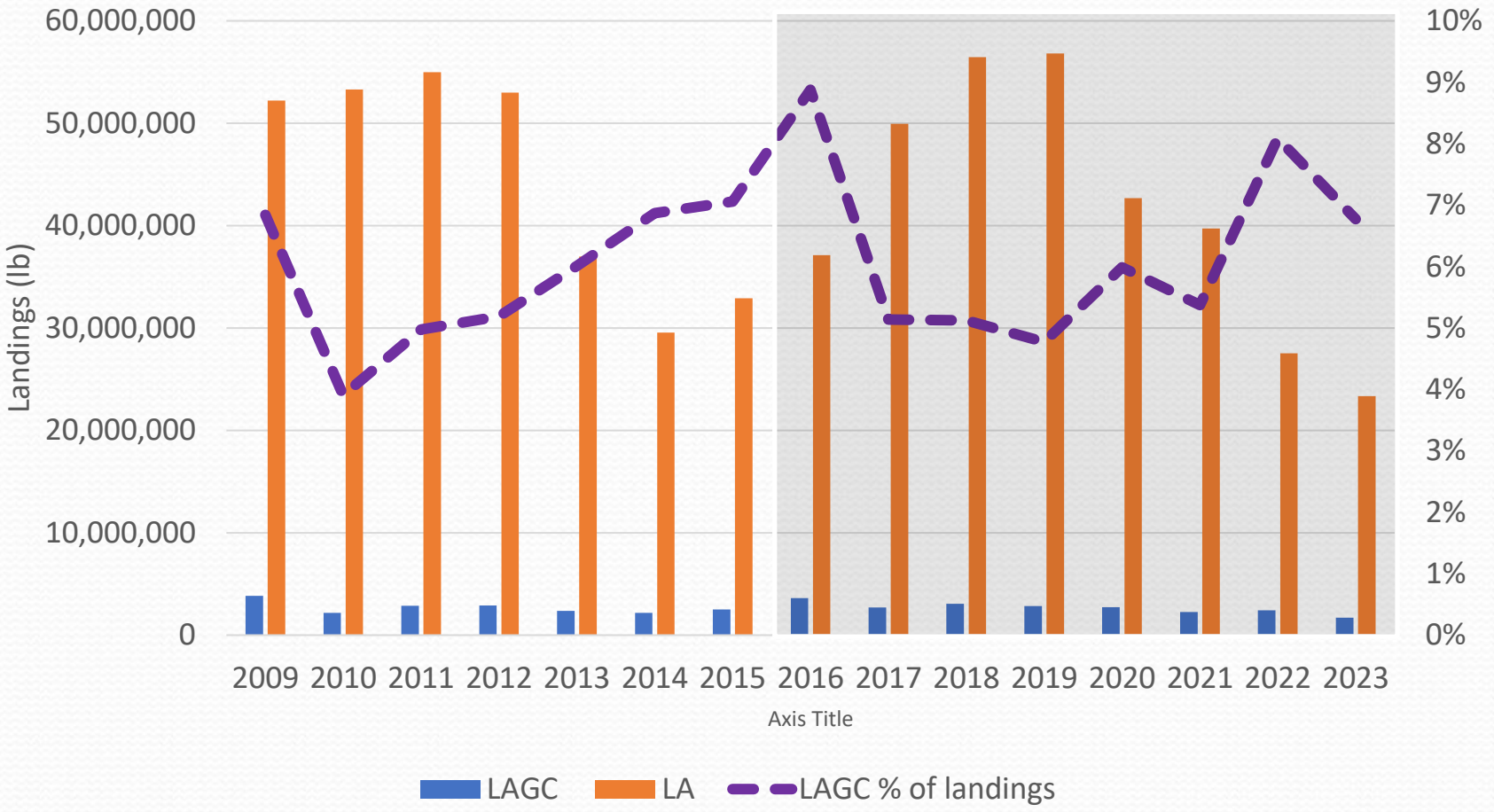
IFQ fleet capacity

- Decline in vessels with IFQ permits from 137 to 97
  - **# MRIs w/o IFQ**: 65 to 105
  - **# MRIs w/ IFQ**: 243 to 176
- **Fleet Capacity** down by 15.4%
  - Fleet capacity = # Boats* average gross tonnage * average length * average horsepower
  - Fewer but more efficient vessels in fleet
  - Effect of LAGC A (IFQ) to LAGC B (NGOM) transfers



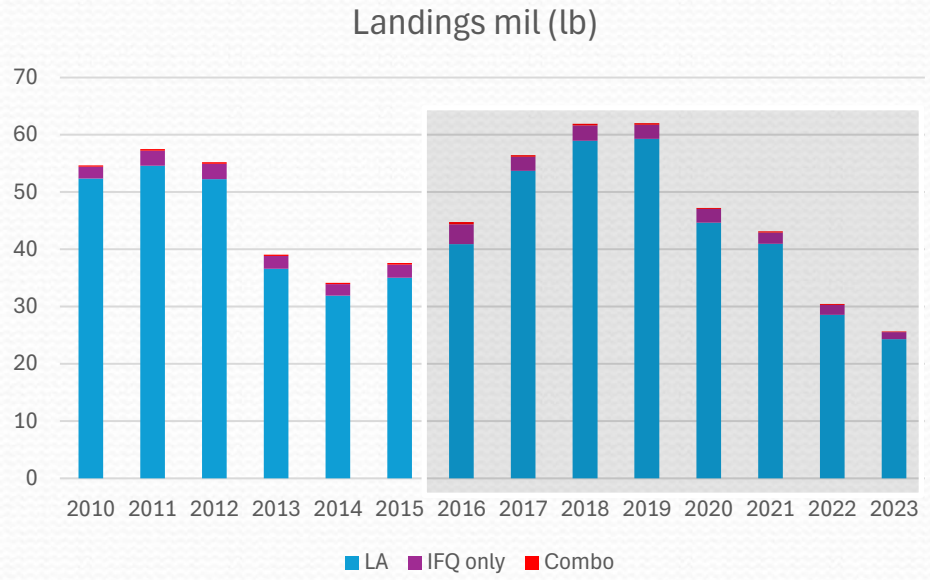
IFQ allocation and landings

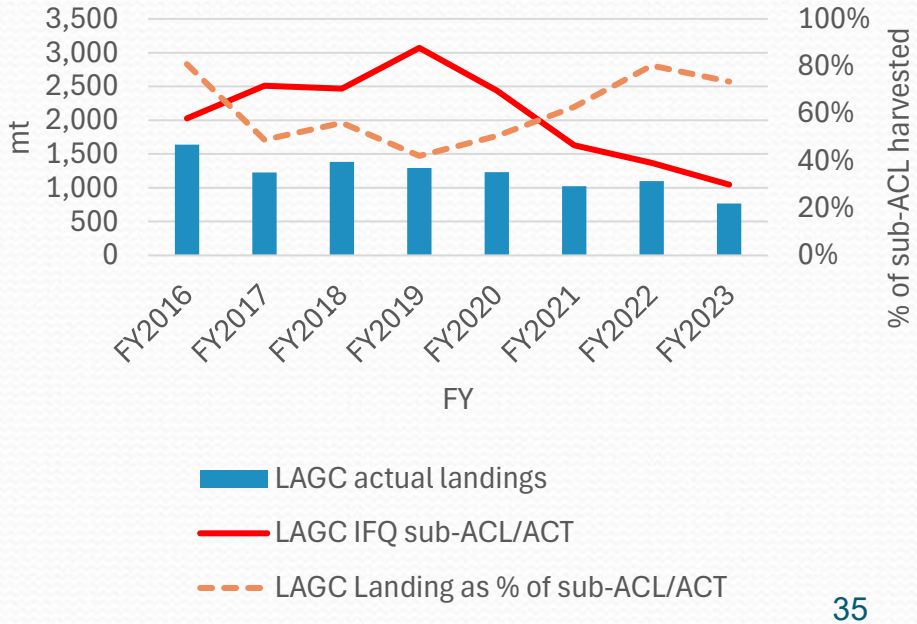
Fishing year	Quota (lb)
2010	2,326,700
2011	2,910,800
2012	3,095,450
2013	2,227,142
2014	2,202,859
2015	2,700,663
2016	4,067,529
2017	2,261,943
2018	2,806,485
2019	2,998,287
2020	2,466,973
2021	1,903,581
2022	1,570,904
2023	1,142,890



IFQ Landings

- Landings ↓ 1.3% compared to 2010-2015
- Mid Atlantic landings ↓
- New England landings =
- Productivity (LPUE)
  - **Average lbs/boat** and **per trip** ↑
    - Maximizing catch
  - **Average lbs/DAS** and **DF** ↓
    - Aggregate: Shows decline in total vessels
  - **Commute time** (% Total DAS) ↑





Revenue

- **Average Revenue** down 1.9%
- **Cost of operation** down (trip costs, capital, fixed costs)
- **Profit** up 24.5%
  - Evidence of concentration of revenue among fewer vessels
  - Fewer vessels = more $ at individual level

Fishing Year	Landings mil LBS	Revenue mil 2023$	Trip Cost mil 2023$	Opp Cost: Capital mil 2023$	Opp Cost: Labor mil 2023$	Fixed Cost mil 2023$	Profit mil 2023$
2010	2.078	25.544	4.444	7.385	2.177	10.693	0.845
2011	2.635	37.591	5.649	5.167	2.329	10.021	14.426
2012	2.693	37.015	5.168	3.404	2.205	8.368	17.871
2013	2.222	35.246	4.816	3.852	2.277	8.419	15.881
2014	2.008	34.755	4.634	3.499	2.196	9.074	15.351
2015	2.289	38.269	4.173	3.515	2.807	8.641	19.133
2016	3.440	53.637	5.927	3.871	4.544	9.516	29.779
2017	2.466	35.179	4.097	3.607	2.702	9.032	15.741
2018	2.680	31.918	4.070	3.246	2.513	8.465	13.623
2019	2.461	30.569	3.833	1.994	2.478	6.894	15.371
2020	2.364	35.016	3.678	1.790	2.890	7.102	19.556
2021	1.949	37.979	4.397	2.214	2.646	6.660	22.061
2022	1.731	29.942	4.420	2.039	2.018	5.617	15.847
2023	1.228	18.381	3.094	2.035	1.723	4.940	6.588
Avg 2010-2015	**2.321**	**34.736**	**4.814**	**4.470**	**2.332**	**9.203**	**13.918**
Avg 2016-2023	2.290	34.078	4.190	2.599	2.689	7.278	17.321
% Chang Relative to Base (Avg 2010-2015):							
% Change in Avg 2016-2023	-1.34%	-1.9%	-13.0%	-41.8%	15.3%	-20.9%	24.5%

Leasing

- IFQ Quota Distribution:
  - **2010:** 90% of fleet owned 64% of quota
  - **2023:** 90% of fleet owned 51% of quota
- % of quota leased:
  - **MRIs with IFQ:** quota leased out went from 59% to 75%
  - **MRIs w/o IFQ:** quota leased in went from 16% to 49%
- % of vessels with 0% of revenue from scallops:
  - **Pre IFQ:** 13%
  - **2010-2015:** 24%
  - **2016-2023:** 19%

Reliance on revenue from scallops among vessels holding an IFQ permit in at least one fishing year from 2010-2023; no LA permits

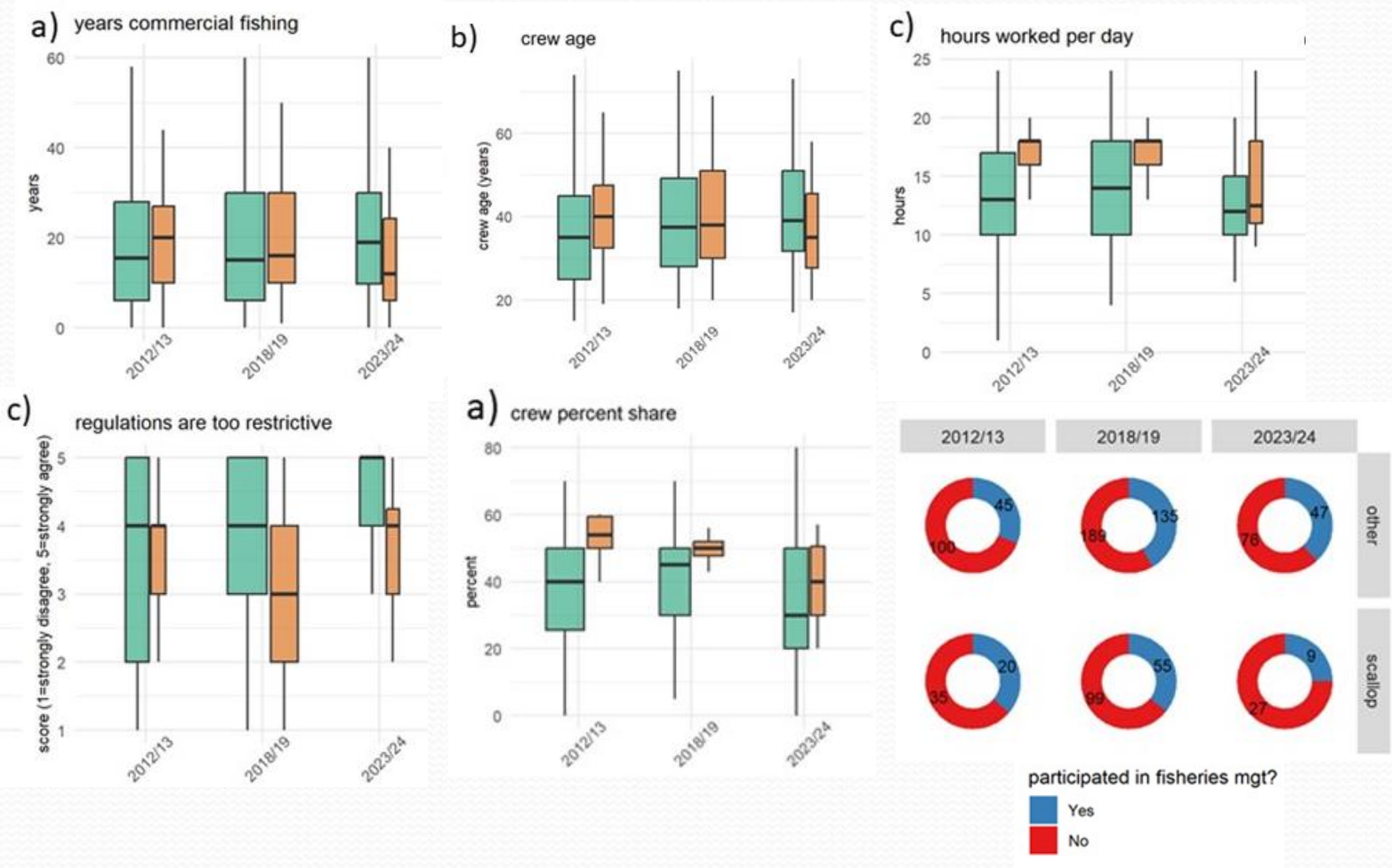
% Revenue from Scallops	2004-2009	2010-2015	2016-2023
0%	47 (13.1%)	74 (24.0%)	53 (19.0%)
0.1% - <25%	106 (29.4%)	69 (22.4%)	54 (19.4%)
25% - <50%	50 (13.9%)	30 (9.7%)	28 (10.0%)
50% - <75%	24 (6.7%)	24 (7.8%)	19 (6.8%)
75% - <100%	124 (34.4%)	101 (32.8%)	99 (35.5%)
100%	9 (2.5%)	10 (3.3%)	26 (9.3%)

**Note: if an IFQ-permitted scallop vessel had no revenue from any fishery during an entire time period, it is not included*

- % of vessels with 100% of revenue from scallops:
  - **Pre IFQ:** 2.5%
  - **2010-2015:** 3.3%
  - **2016-2023:** 9.3%

NEFSC Crew Survey Comparative Analysis

- Three survey waves: 2012/2013 (n = 359), 2018/2019 (n = 478), and 2023/2024 (n = 162)
- Vessel crew demographics
  - Crew age ↓
- Participation and practices
  - # of working hours ↓
- Views on management
  - Satisfaction with management ↓
  - Management participation ↓
- Job satisfaction
  - Employment ease ↑
  - Earnings satisfaction ↑
- Well-being over time
  - Crew share revenue ↓



Note: Crew survey does not ask about associated permit type - not just crew on IFQ vessels.

Scallop Framework 40

- Specifications for FY2026 and FY2027 (default)
- Updating stock reference points from Research Track Assessment
- Key milestones & meetings:
  - **Motion to initiate action (today!)**
  - Survey data in by mid-August
  - August 19, 2025 SSC meeting on stock reference points
  - October 8, 2025 SSC meeting on OFL and ABC
  - Final action at December Council meeting

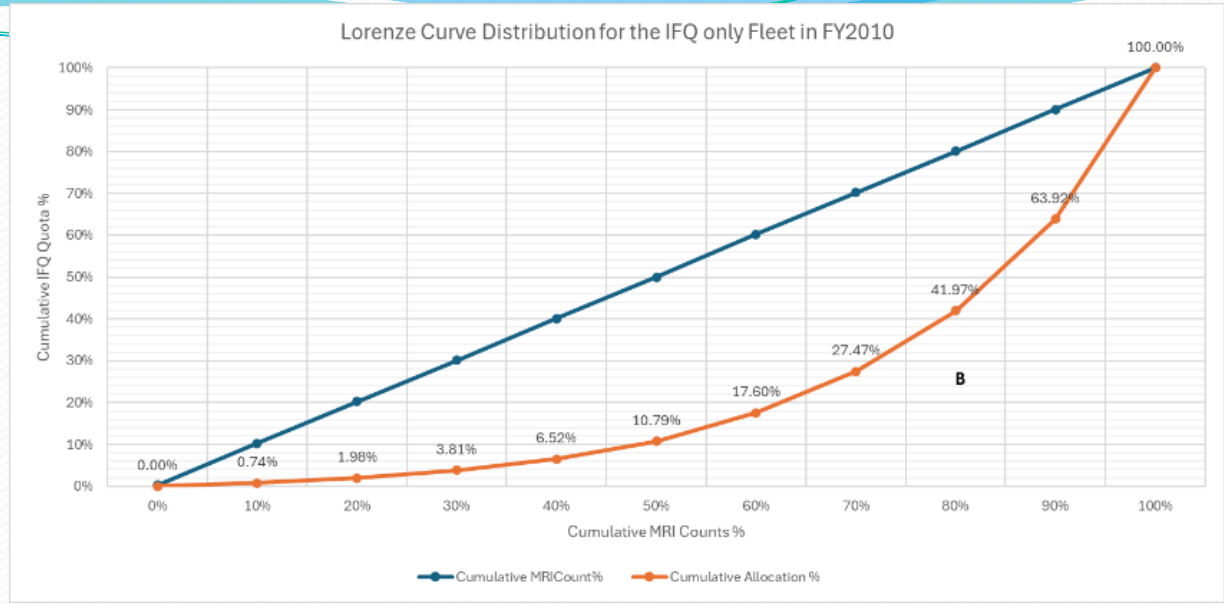
Questions?

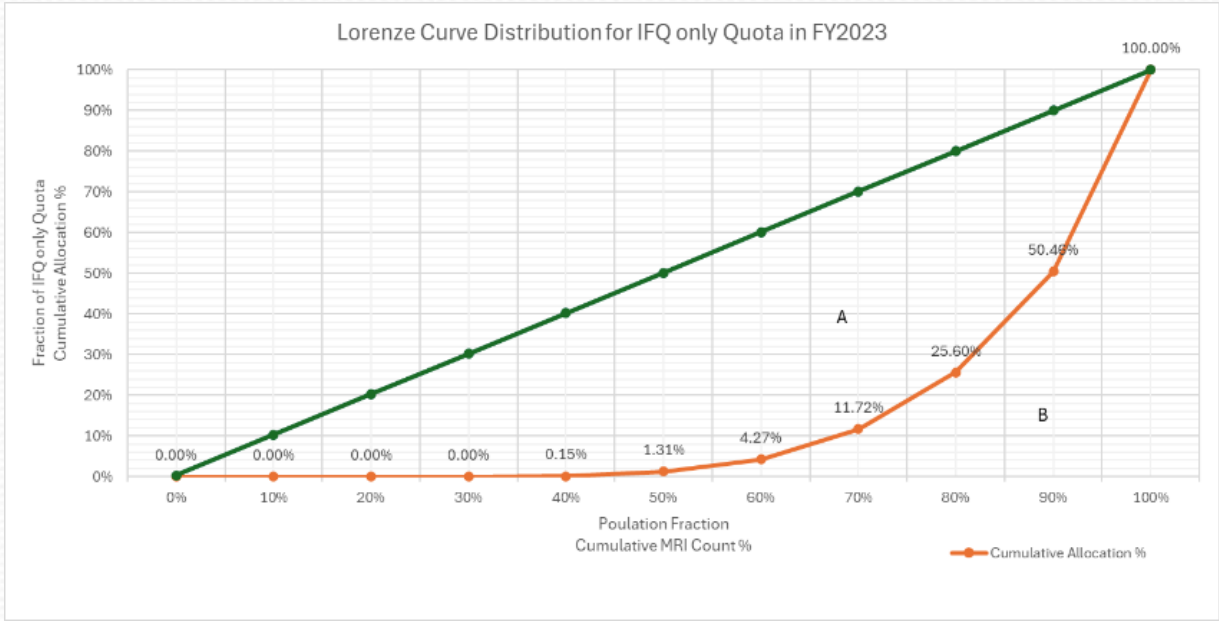
Extra Slides

New England
Fishery Management Council

IFQ Quota Distribution

- **2010:** 90% of fleet owned 63.92% of quota
- **2023:** 90% of fleet owned 50.46% of quota
  - Small holders transferred off and are lease only





Total Factor Productivity for the IFQ only Fleet

		Economic Values in mil 2023$									
FY	Output	Fuel	Supplies	Opp Cost: Capital	Opp Cost: Labor	Fixed Costs	Total Inputs	Total Factor Productivity	TFP Index (Base= Avg 2010-15)	Output Index	Input Index
2010	$25.54	$2.98	$1.47	$7.38	$2.18	$10.69	$24.70	1.03			
2011	$37.59	$3.78	$1.86	$5.17	$2.33	$10.02	$23.16	1.62			
2012	$37.01	$3.46	$1.71	$3.40	$2.20	$8.37	$19.14	1.93			
2013	$35.25	$3.23	$1.59	$3.85	$2.28	$8.42	$19.37	1.82			
2014	$34.75	$3.11	$1.53	$3.50	$2.20	$9.07	$19.41	1.79			
2015	$38.27	$2.80	$1.38	$3.51	$2.81	$8.64	$19.14	2.00	1.00	1.00	1.00
2016	$53.64	$3.97	$1.96	$3.87	$4.54	$9.52	$23.86	2.25	1.32	1.54	1.15
2017	$35.18	$2.74	$1.35	$3.61	$2.70	$9.03	$19.43	1.81	1.06	1.01	0.93
2018	$31.92	$2.73	$1.34	$3.25	$2.51	$8.47	$18.30	1.74	1.03	0.92	0.88
2019	$30.57	$2.57	$1.26	$1.99	$2.48	$6.89	$15.19	2.01	1.18	0.88	0.73
2020	$35.02	$2.46	$1.21	$1.79	$2.89	$7.10	$15.45	2.26	1.33	1.01	0.74
2021	$37.98	$2.95	$1.45	$2.21	$2.65	$6.66	$15.92	2.39	1.40	1.09	0.76
2022	$29.94	$2.96	$1.46	$2.04	$2.02	$5.62	$14.10	2.12	1.25	0.86	0.68
2023	$18.38	$2.07	$1.02	$2.04	$1.72	$4.94	$11.79	1.56	0.92	0.53	0.57
Avg 2010-15	$34.74	$3.23	$1.59	$4.47	$2.33	$9.20	$20.82	1.70	1.00		
Avg 2016-23	$34.08	$2.81	$1.38	$2.60	$2.69	$7.28	$16.76	2.02	1.19		

Revenue per Effort (in 2023$) for LA and IFQ only Fleet

	LA Fleet				IFQ only Fleet			
FY	Revenue/Boat	Revenue/Trip	Revenue/DAS	Revenue/DF	Revenue/ Boat	Revenue/ Trip	Revenue/ DAS	Revenue/ DF
2010	$1,689,641	$185,675	$22,503	$42,195	$182,458	$4,443	$6,231	$19,162
2011	$2,120,296	$246,365	$31,876	$73,506	$278,449	$6,177	$8,824	$29,044
2012	$1,958,436	$232,606	$29,123	$54,315	$321,866	$7,084	$9,547	$27,059
2013	$1,596,960	$239,095	$31,542	$52,519	$301,244	$7,529	$9,185	$22,163
2014	$1,519,244	$258,294	$33,537	$53,273	$275,830	$7,835	$8,647	$18,519
2015	$1,627,396	$219,953	$30,524	$59,700	$316,270	$7,792	$8,217	$20,302
2016	$1,810,650	$215,182	$27,189	$46,459	$391,513	$7,936	$7,737	$21,289
2017	$1,877,216	$202,216	$28,282	$57,021	$264,504	$7,483	$7,823	$23,345
2018	$1,936,226	$177,333	$26,948	$65,530	$251,320	$6,449	$7,293	$24,338
2019	$1,916,314	$171,996	$25,379	$70,614	$291,137	$6,531	$7,529	$22,850
2020	$1,579,721	$158,844	$22,191	$46,621	$315,457	$7,587	$7,816	$22,536
2021	$2,044,352	$225,203	$28,262	$60,676	$336,098	$10,000	$9,208	$22,582
2022	$1,213,584	$205,580	$26,450	$55,374	$299,417	$9,123	$8,833	$22,663
2023	$892,659	$170,030	$23,747	$47,544	$201,985	$7,305	$6,219	$15,221

Economic Performance of the IFQ only Fleet

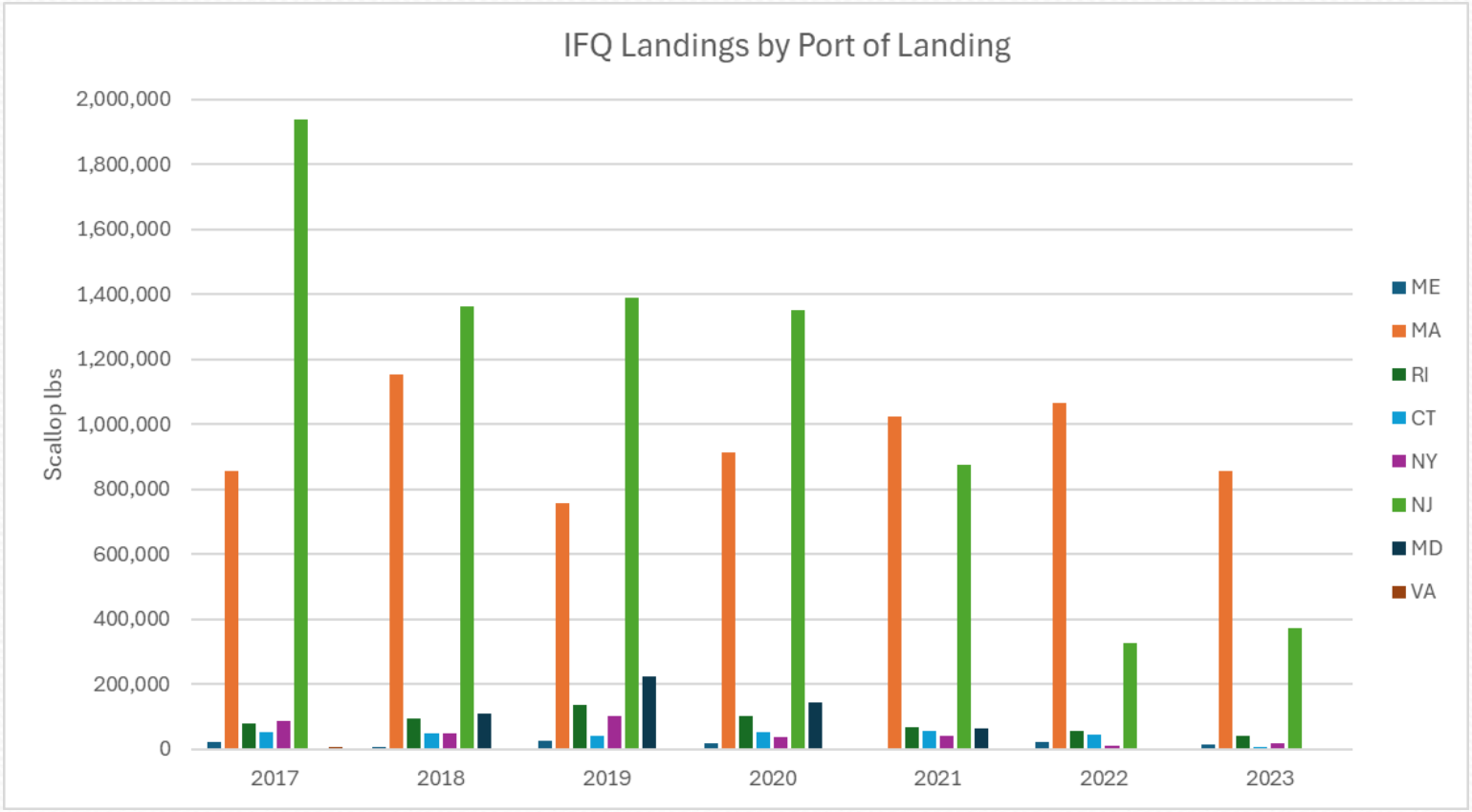
Fishing Year	Landings mil LBS	Revenue mil 2023$	Trip Cost mil 2023$	Opp Cost: Capital mil 2023$	Opp Cost: Labor mil 2023$	Net Revenue mil 2023$	Producer Surplus mil 2023$	Fixed Cost mil 2023$	Profit mil 2023$
2010	2.078	25.544	4.444	7.385	2.177	21.101	11.538	10.693	0.845
2011	2.635	37.591	5.649	5.167	2.329	31.942	24.447	10.021	14.426
2012	2.693	37.015	5.168	3.404	2.205	31.846	26.238	8.368	17.871
2013	2.222	35.246	4.816	3.852	2.277	30.430	24.300	8.419	15.881
2014	2.008	34.755	4.634	3.499	2.196	30.120	24.426	9.074	15.351
2015	2.289	38.269	4.173	3.515	2.807	34.096	27.774	8.641	19.133
2016	3.440	53.637	5.927	3.871	4.544	47.710	39.295	9.516	29.779
2017	2.466	35.179	4.097	3.607	2.702	31.082	24.774	9.032	15.741
2018	2.680	31.918	4.070	3.246	2.513	27.847	22.088	8.465	13.623
2019	2.461	30.569	3.833	1.994	2.478	26.737	22.265	6.894	15.371
2020	2.364	35.016	3.678	1.790	2.890	31.338	26.657	7.102	19.556
2021	1.949	37.979	4.397	2.214	2.646	33.582	28.722	6.660	22.061
2022	1.731	29.942	4.420	2.039	2.018	25.522	21.464	5.617	15.847
2023	1.228	18.381	3.094	2.035	1.723	15.286	11.528	4.940	6.588
Avg 2010-2015	**2.321**	**34.736**	**4.814**	**4.470**	**2.332**	**29.922**	**23.120**	**9.203**	**13.918**
Avg 2016-2023	2.290	34.078	4.190	2.599	2.689	29.888	24.599	7.278	17.321
Avg 2016-2019	2.761	37.826	4.482	3.179	3.059	33.344	27.106	8.477	18.629
Avg 2020-2023	1.818	30.329	3.897	2.020	2.319	26.432	22.093	6.080	16.013
% Chang Relative to Base (Avg 2010-2015):									
% Change in Avg 2016-2023	-1.34%	-1.9%	-13.0%	-41.8%	15.3%	-0.1%	6.4%	-20.9%	24.5%
% Change Avg 2016-2019	18.98%	8.9%	-6.9%	-28.9%	31.2%	11.4%	17.2%	-7.9%	33.8%
% Change Avg 2020-2023	-21.66%	-12.7%	-19.0%	-54.8%	-0.5%	-11.7%	-4.4%	-33.9%	15.1%

MRI Counts with and without IFQ, and leasing percentages in the IFQ Only Allocation

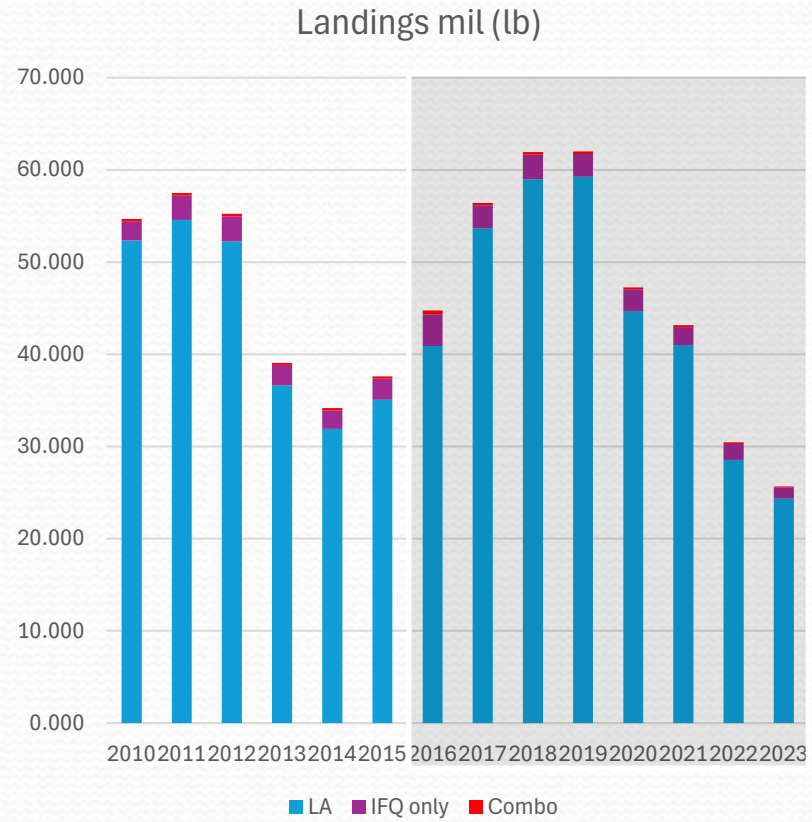
FY	Total MRI Counts	Scallop Landed	MRI With Zero IFQ					MRI With >0 IFQ				
			MRI Counts (w/o IFQ)	Lease in lbs	Lease out lbs	Lease out % (out of Lease in)	Lease In % out of base total	MRI Counts (w/ IFQ)	Base total lbs	Lease out lbs	Lease out % out of base total	Lease out % (In Group or to IFQ Quota Holders)
2010	**332**	2,145,686	**6**	-	-		0%	**326**	2,334,720	(1,153,140)	-49.4%	49.4%
2011	**332**	2,753,974	**14**	-	-		0%	**318**	2,918,800	(1,353,196)	-46.4%	46.4%
2012	**319**	2,839,193	**6**	50,730	(3,000)	-6%	2%	**313**	3,103,900	(1,381,649)	-44.5%	42.9%
2013	**317**	2,269,159	**32**	160,768	(22,730)	-14%	7%	**285**	2,243,530	(1,156,335)	-51.5%	44.4%
2014	**317**	2,096,962	**47**	184,357	(29,371)	-16%	8%	**270**	2,212,740	(1,276,592)	-57.7%	49.4%
2015	**309**	2,386,824	**49**	355,464	(29,600)	-8%	13%	**260**	2,708,050	(1,661,670)	-61.4%	48.2%
2016	**308**	3,496,599	**65**	669,184	(63,088)	-9%	16%	**243**	4,077,850	(2,415,319)	-59.2%	42.8%
2017	**308**	2,580,512	**89**	598,458	(110,007)	-18%	26%	**219**	2,268,150	(1,509,468)	-66.6%	40.2%
2018	**306**	2,803,845	**87**	728,799	(45,980)	-6%	26%	**219**	2,813,790	(1,861,957)	-66.2%	40.3%
2019	**303**	2,571,269	**94**	883,919	(66,070)	-7%	29%	**209**	3,006,090	(1,906,957)	-63.4%	34.0%
2020	**303**	2,464,945	**107**	726,979	(86,224)	-12%	29%	**196**	2,473,470	(1,652,470)	-66.8%	37.4%
2021	**296**	2,026,435	**107**	707,743	(128,205)	-18%	37%	**189**	1,908,820	(1,380,884)	-72.3%	35.3%
2022	**289**	1,544,146	**102**	618,988	(94,214)	-15%	39%	**187**	1,575,390	(1,135,561)	-72.1%	32.8%
2023	**281**	1,164,730	**105**	567,028	(47,147)	-8%	49%	**176**	1,146,220	(862,514)	-75.2%	25.8%

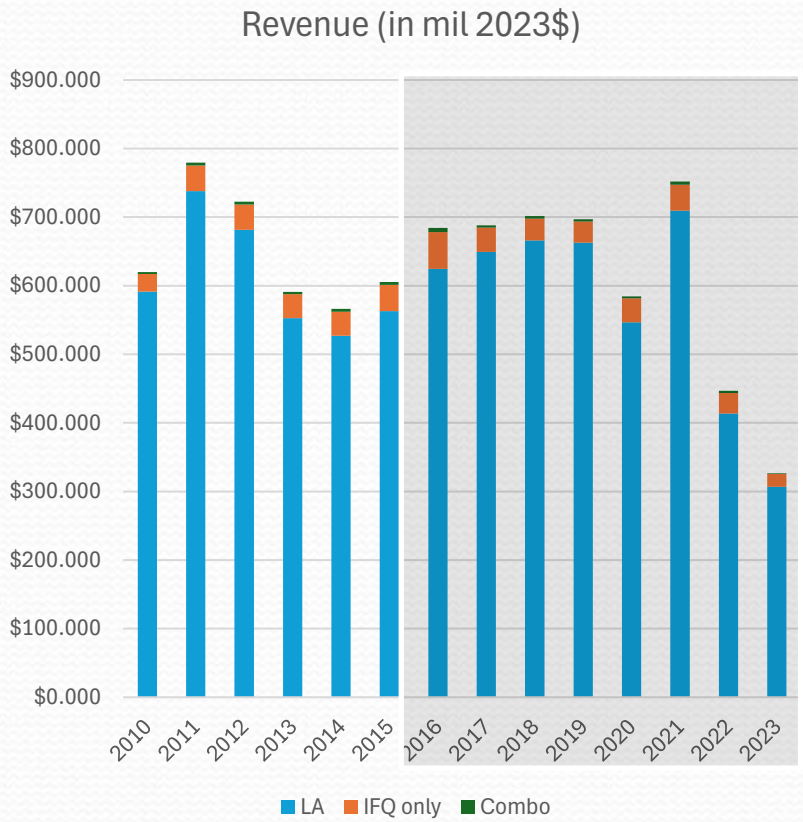
IFQ landings by port of landing

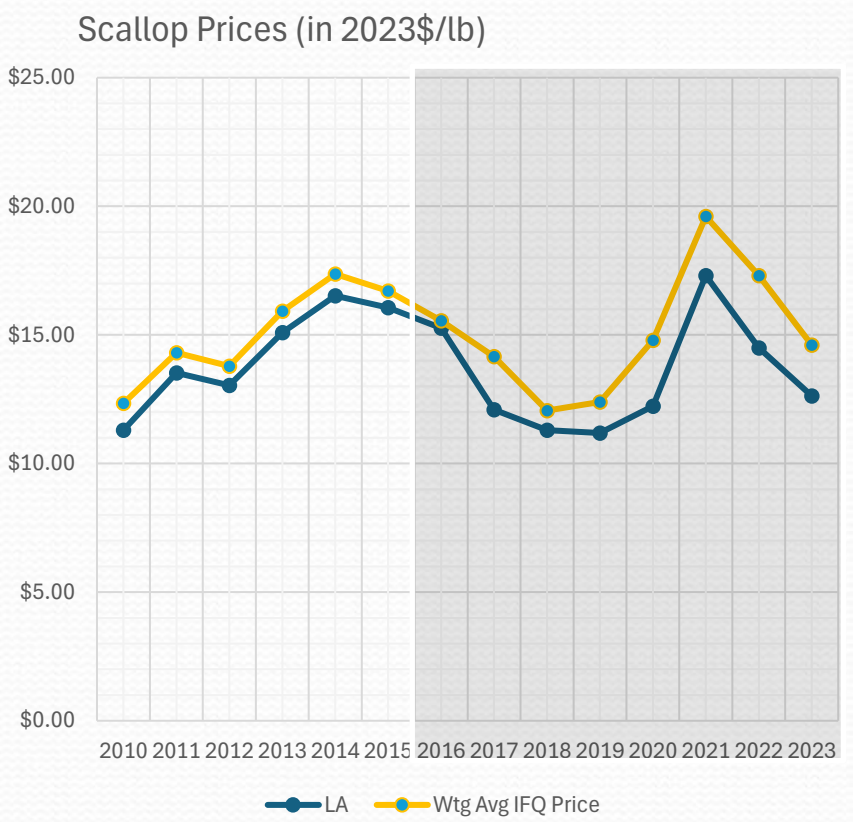
- Mid-Atlantic catch ↓
- New England catch ↑
- Northern shift of resource?



Landings, Revenues and Prices for LA and IFQ Fleets







Fishing Productivities (LPUEs) for the IFQ only Fleet

							Productivity Indices (Base= Avg 2010-2015)			
FY	LBS/Boat	LBS/DAS	LBS/DF	LBS/TRIP	TDF/TDAS	Commute Time (% TDAS)	LBS/Boat	LBS/DAS	LBS/DF	LBS/TRIP
2010	14,844	507	1,559	361	33%	67%				
2011	19,520	619	2,036	433	30%	70%				
2012	23,420	695	1,969	515	35%	65%				
2013	18,989	579	1,397	475	41%	59%				
2014	15,933	499	1,070	453	47%	53%				
2015	18,919	492	1,214	466	40%	60%	**1.00**	**1.00**	**1.00**	**1.00**
2016	25,106	496	1,365	509	36%	64%	1.35	0.88	0.89	1.13
2017	18,539	548	1,636	524	34%	66%	1.00	0.97	1.06	1.16
2018	21,103	612	2,044	542	30%	70%	1.13	1.08	1.33	1.20
2019	23,434	606	1,839	526	33%	67%	1.26	1.07	1.19	1.17
2020	21,298	528	1,521	512	35%	65%	1.14	0.93	0.99	1.14
2021	17,245	472	1,159	513	41%	59%	0.93	0.84	0.75	1.14
2022	17,313	511	1,310	528	39%	61%	0.93	0.90	0.85	1.17
2023	13,498	416	1,017	488	41%	59%	0.73	0.74	0.66	1.08
Avg 2010-2015	**18,604**	**565**	**1,541**	**451**						

Producer Surplus Scenario Compared to Pre-IFQ Period (2007-2009)

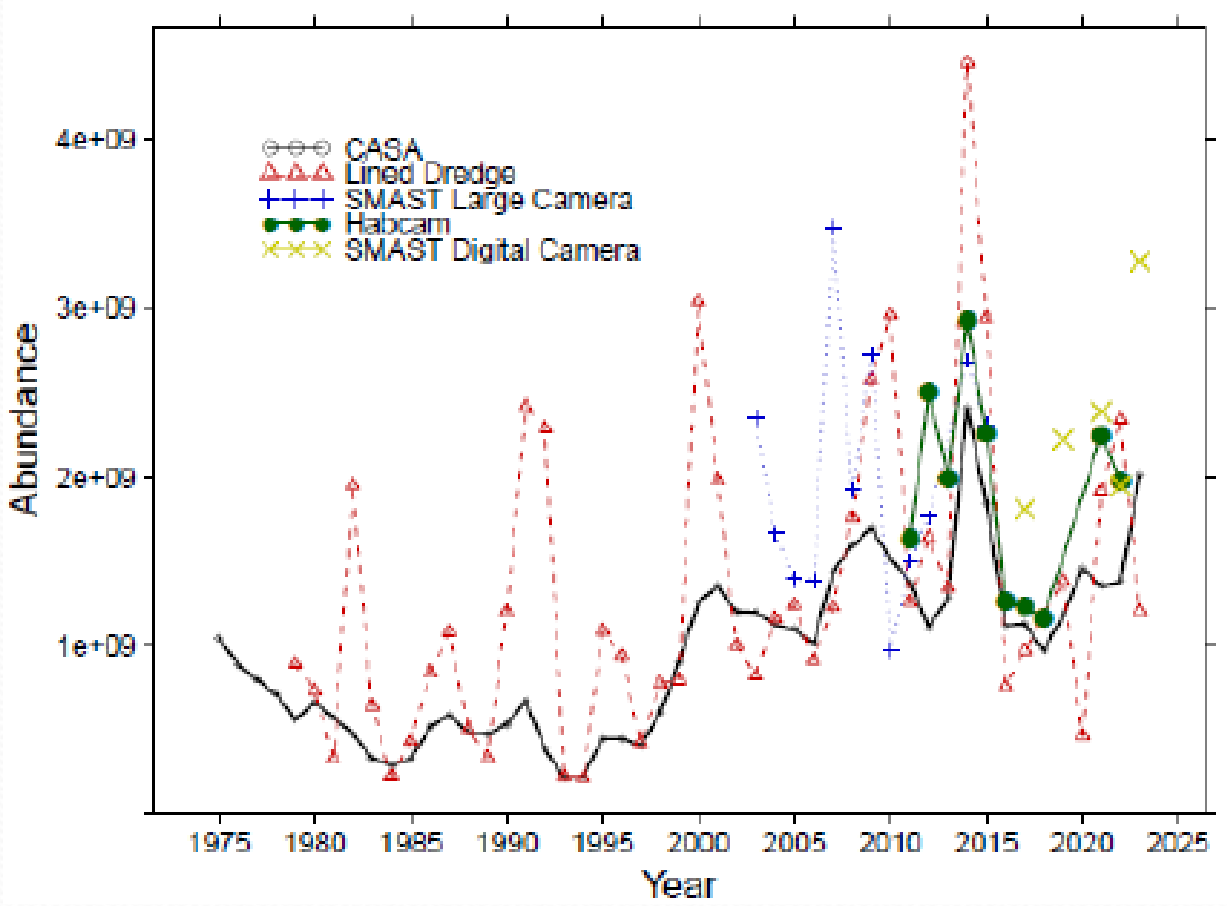
FY	# active vessels	Scallop Revenue (actual values)	Total trip costs	Total Opp. costs of crew	Total Opp. costs of capital	Producer surplus	% Change in producer surplus compared to Scenario B
Scenario A: Number of active vessels = Actual numbers							
2010	140	25.544	4.444	2.177	7.385	11.538	465%
2011	135	37.591	5.649	2.329	5.167	24.447	41%
2012	115	37.015	5.168	2.205	3.404	26.238	30%
2013	117	35.246	4.816	2.277	3.852	24.300	38%
2014	126	34.755	4.634	2.196	3.499	24.426	28%
2015	121	38.269	4.173	2.807	3.515	27.774	26%
2016	137	53.637	5.927	4.544	3.871	39.295	15%
2017	133	35.179	4.097	2.702	3.607	24.774	26%
2018	127	31.918	4.070	2.513	3.246	22.088	29%
2019	105	30.569	3.833	2.478	1.994	22.265	22%
2020	111	35.016	3.678	2.890	1.790	26.657	14%
2021	113	37.979	4.397	2.646	2.214	28.722	16%
2022	100	29.942	4.420	2.018	2.039	21.464	26%
2023	91	18.381	3.094	1.723	2.035	11.528	80%
Scenario B: Assumes the number of active vessels equaled average for 2007-2009							
2010	320	25.544	4.444	2.177	16.880	2.04	
2011	320	37.591	5.649	2.329	12.247	17.37	
2012	320	37.015	5.168	2.205	9.471	20.17	
2013	320	35.246	4.816	2.277	10.537	17.62	
2014	320	34.755	4.634	2.196	8.886	19.04	
2015	320	38.269	4.173	2.807	9.295	21.99	
2016	320	53.637	5.927	4.544	9.041	34.13	
2017	320	35.179	4.097	2.702	8.678	19.70	
2018	320	31.918	4.070	2.513	8.179	17.16	
2019	320	30.569	3.833	2.478	6.076	18.18	
2020	320	35.016	3.678	2.890	5.160	23.29	
2021	320	37.979	4.397	2.646	6.270	24.67	
2022	320	29.942	4.420	2.018	6.526	16.98	
2023	320	18.381	3.094	1.723	7.157	6.41	

Profit Scenario Compared to Pre-IFQ Period (2007-2009)

FY	# active vessels	Scallop Revenue (actual values)	Total Opp. costs of capital	Total Fixed Costs	Producer Surplus	Total Profits
Scenario A: Number of active vessels = Actual numbers						
2010	140	25.544	7.385	10.693	11.538	0.845
2011	135	37.591	5.167	10.021	24.447	14.426
2012	115	37.015	3.404	8.368	26.238	17.871
2013	117	35.246	3.852	8.419	24.300	15.881
2014	126	34.755	3.499	9.074	24.426	15.351
2015	121	38.269	3.515	8.641	27.774	19.133
2016	137	53.637	3.871	9.516	39.295	29.779
2017	133	35.179	3.607	9.032	24.774	15.741
2018	127	31.918	3.246	8.465	22.088	13.623
2019	105	30.569	1.994	6.894	22.265	15.371
2020	111	35.016	1.790	7.102	26.657	19.556
2021	113	37.979	2.214	6.660	28.722	22.061
2022	100	29.942	2.039	5.617	21.464	15.847
2023	91	18.381	2.035	4.940	11.528	6.588
Scenario B: Assumes the number of active vessels equaled average for 2007-2009						
2010	320	25.544	16.880	24.442	2.043	(22.40)
2011	320	37.591	12.247	23.754	17.367	(6.39)
2012	320	37.015	9.471	23.284	20.171	(3.11)
2013	320	35.246	10.537	23.026	17.615	(5.41)
2014	320	34.755	8.886	23.046	19.039	(4.01)
2015	320	38.269	9.295	22.852	21.994	(0.86)
2016	320	53.637	9.041	22.228	34.125	11.90
2017	320	35.179	8.678	21.732	19.702	(2.03)
2018	320	31.918	8.179	21.330	17.155	(4.17)
2019	320	30.569	6.076	21.010	18.183	(2.83)
2020	320	35.016	5.160	20.474	23.288	2.81
2021	320	37.979	6.270	18.862	24.666	5.80
2022	320	29.942	6.526	17.974	16.977	(1.00)
2023	320	18.381	7.157	17.371	6.406	(10.96)

CASA model

- Increased natural mortality in all regions to reflect changing environmental conditions.
- Assessment working group expects this to address systematic bias in projection model
- Mid-Atlantic natural mortality
  - **M=0.25 → M=0.40**
- Georges Bank natural mortality
  - **M=0.20 → M=0.27**



Reference points and stock status

The stock is not overfished and overfishing is not occurring

BUT

F_{2023} = 0.47 in GB relative to F_{MSY}=0.36

Table 1. Select biological reference points for Atlantic Sea Scallop derived from the SAMS model developed for the 2025 Atlantic Sea Scallop Research Track Assessment

Region	MSY (mt of meats)	F_{MSY}	B_{MSY} (mt of meats)	$B_{threshold}$ (mt of meats)	B_{2023} (mt of meats)	F_{2023}
Mid-Atlantic	7,941	1.56	15,909		20,556	0.06
Georges Bank	22,706	0.36	83,414		49,400	0.47
Combined	28,402	0.49	93,282	46,641	69,956	0.33

Overfishing was occurring on Georges Bank in 2023

Reference points and stock status

	Definition in Scallop FMP	SAW 50 (2010)	SARC 59 (2014)	SARC 65 (2018)	2020 Management Track	2024 Research Track
OFL	F_{MSY}	$F_{MSY\ MA}$=0.47	$F_{MSY\ MA}$=0.74	$F_{MSY\ MA}$=0.73	$F_{MSY\ MA}$=0.72	$F_{MSY\ MA}$=1.56
		$F_{MSY\ GB}$=0.21	$F_{MSY\ GB}$=0.30	$F_{MSY\ GB}$=0.57	$F_{MSY\ GB}$=0.46	$F_{MSY\ GB}$=0.36
		F_{MSY}=0.38	F_{MSY}=0.48	F_{MSY}=0.64	F_{MSY}=0.61	F_{MSY}=0.49
ABC=ACL	25% probability of exceeding the OFL	F=0.32	F=0.38	F=0.51	F=0.45	?
B_{MSY}	B_{TARGET}	125,358 mt	96,480 mt	116,766 mt	102,657 mt	93,282 mt
½ B_{MSY}	$B_{THRESHOLD}$	62,679 mt	48,240 mt	58,383 mt	51,329 mt	46,641 mt
MSY		24,975 mt	23,798 mt	46,531 mt	32,079 mt	28,402 mt
Overfished?	$B < B_{THRESHOLD}$	No	No	No	No	No
Overfishing?	$F < F_{THRESHOLD}=F_{MSY}$	No	No	No	No	No*

*Overfishing occurring on Georges Bank in 2023 based on GB-specific F_{MSY}

Panel Recommendations

- Verify the role of increased natural mortality in reconciling the discrepancy between projections and survey observations
- Combined reference point for the entire region risks not identifying overfishing on Georges Bank – recommend developing regional assessment models
- Development of habitat suitability models/joint species distribution models
- Use of geometric mean instead of arithmetic mean for calculating survey indices
- Strong recommendation to evaluate alternative models and modeling structures – need to explore new approaches
- Need to address reliability and consistency of optical image annotation for estimation of survey abundance and biomass
- Need to address spatial autocorrelation in the optical surveys / contagious distribution of scallops themselves
- Continued expansion of scallop aging to fill historical gaps – work towards age-based assessment

What can the Council achieve through a Framework?

- Total allowable catch and DAS changes;
- Offloading window reinstatement;
- Effort monitoring;
- Data reporting;
- **Trip limits;**
- **Gear restrictions;**
- **Permitting restrictions;**
- **Crew limits;**
- Modifications to the overfishing definition;
- VMS Demarcation Line for DAS monitoring;
- DAS allocations by gear type;
- **Temporary leasing of scallop DAS requiring full public hearings;**
- Scallop size restrictions, except a minimum size or weight of individual scallop meats in the catch;
- **Aquaculture enhancement measures and closures;**
- Closed areas to increase the size of scallops caught;
- **Modifications to the opening dates of closed areas;**
- **Size and configuration of rotational management areas;**
- **Controlled access seasons to minimize bycatch and maximize yield;**
- Area-specific trip allocations;
- TAC specifications and seasons following re-opening;
- Limits on number of area closures;
- Set-asides for funding research;
- Priorities for scallop-related research that is funded by research TAC set-aside;
- Sea sampling frequency;
- Area-specific gear limits and specifications;
- Modifications to provisions associated with observer set-asides; observer coverage; observer deployment; observer service provider; and/or the observer certification regulations;
- Specifications for IFQs for limited access general category vessels;
- Revisions to the cost recovery program for IFQs;
- Development of general category fishing industry sectors and fishing cooperatives;
- **Adjustments to the Northern Gulf of Maine scallop fishery measures;**
- VMS requirements;
- **Increases or decreases in the LAGC possession limit;**
- Adjustments to aspects of ACL management, including accountability measures;
- **Any other management measures currently included in the FMP.**