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*1. Correspondence (June 22-24, 2021) M*

#13a.10

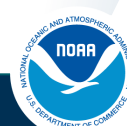
# 2021 HMS Fisheries Economic Situation Report

HMS Advisory Panel Meeting

May 27, 2021

# Outline

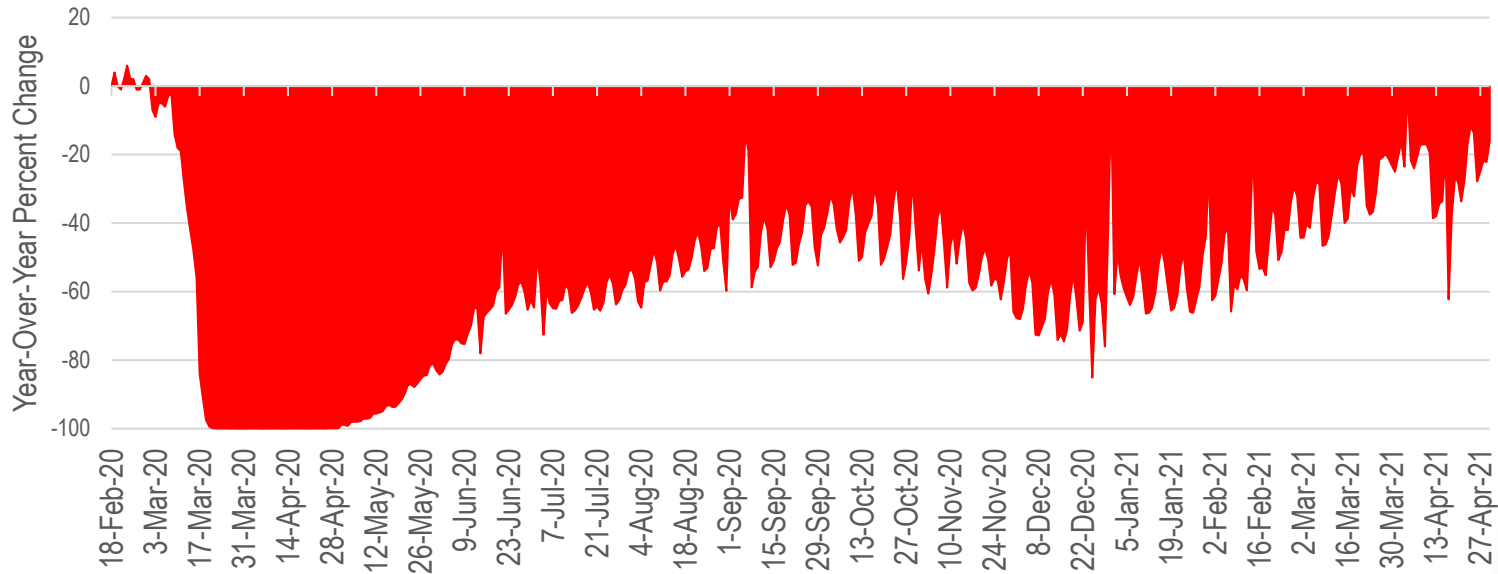
- Macroeconomic Indicators Update
- Atlantic HMS Landings Revenue
- Price Trends
- Commercial Vessel Activity
- For-Hire Sector
- Tournaments



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# Restaurant Sales

% Change in Seated Diners on the OpenTable Network (2019 versus 2020 & 2021)



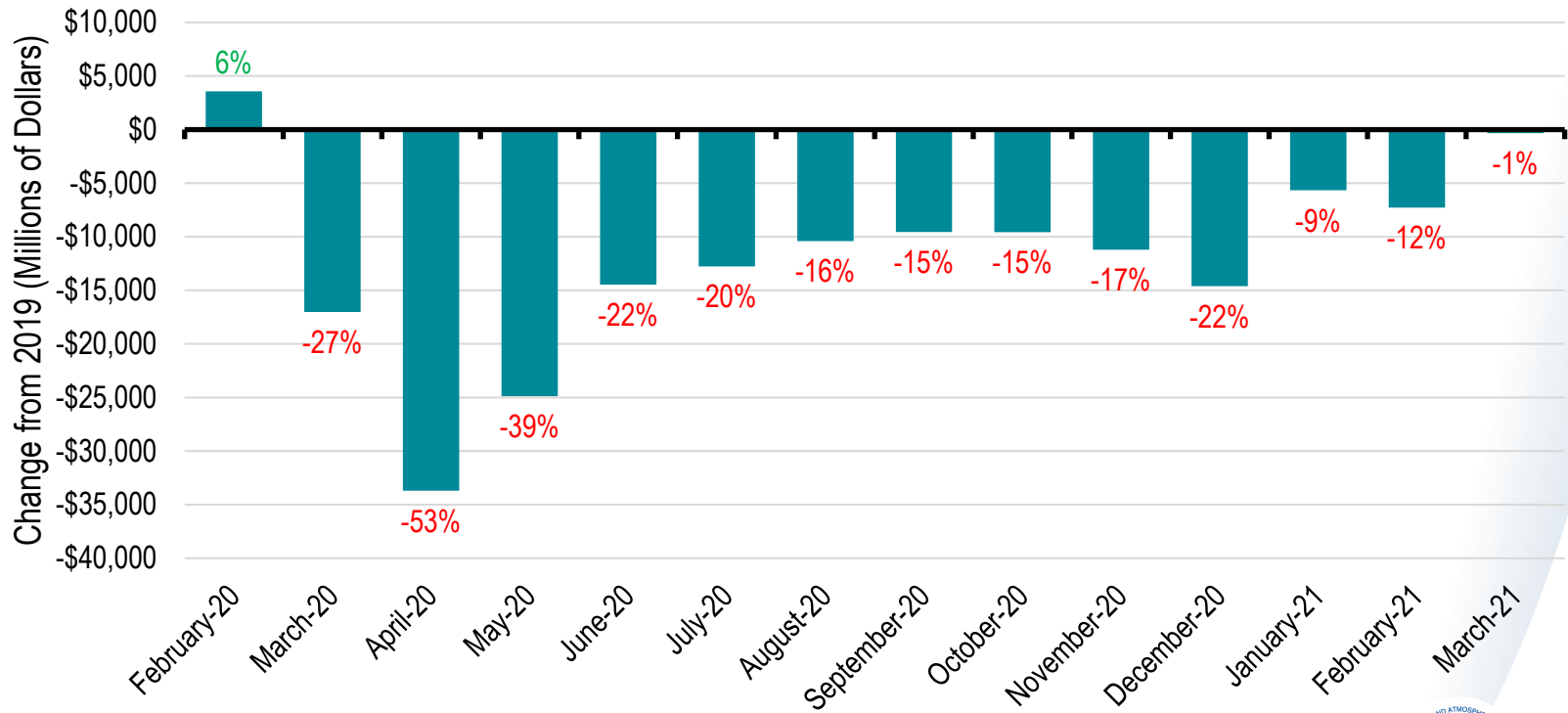
- **68%** of all consumer expenditures for fishery products were made at food service establishments



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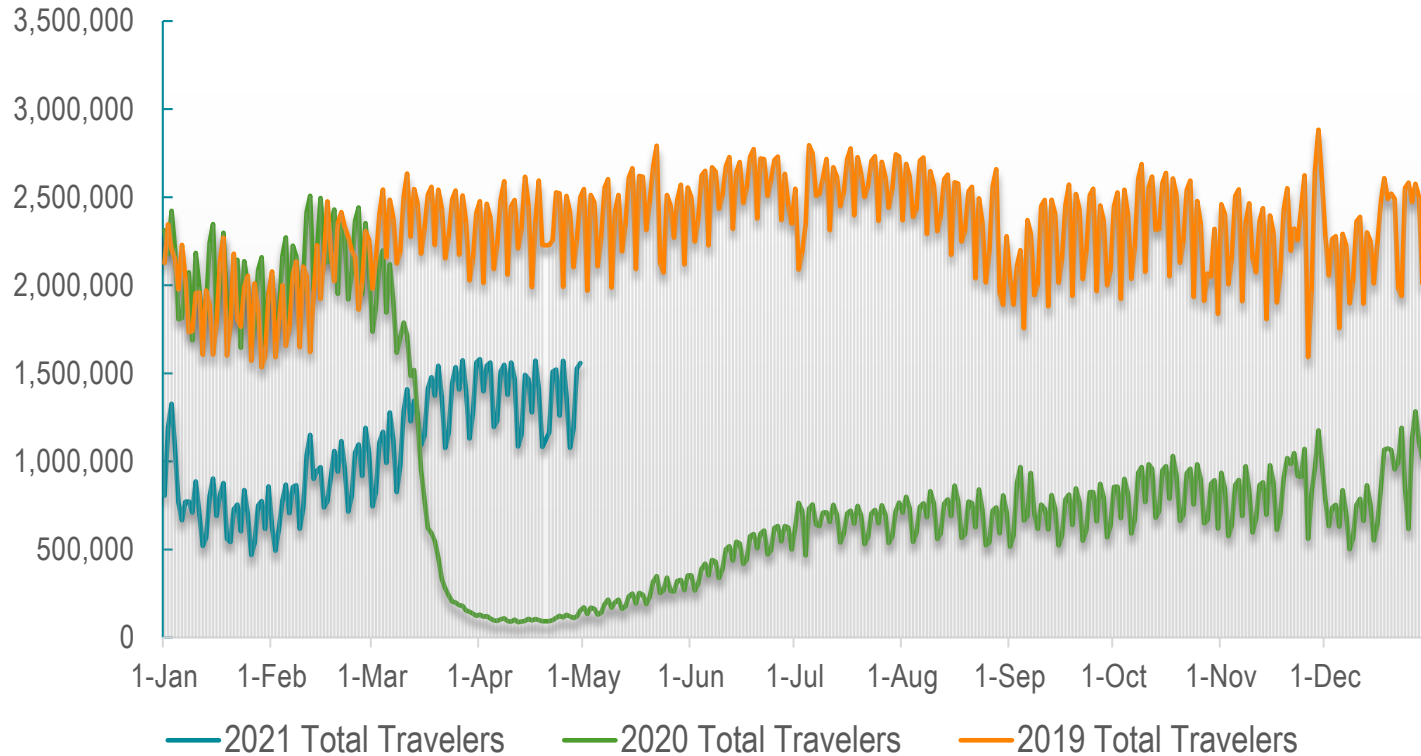
# U.S. Restaurant and Bar Sales

## Change in Sales at Food Service & Drinking Places



# Travel

## TSA Checkpoint Travel Numbers for 2021, 2020, and 2019

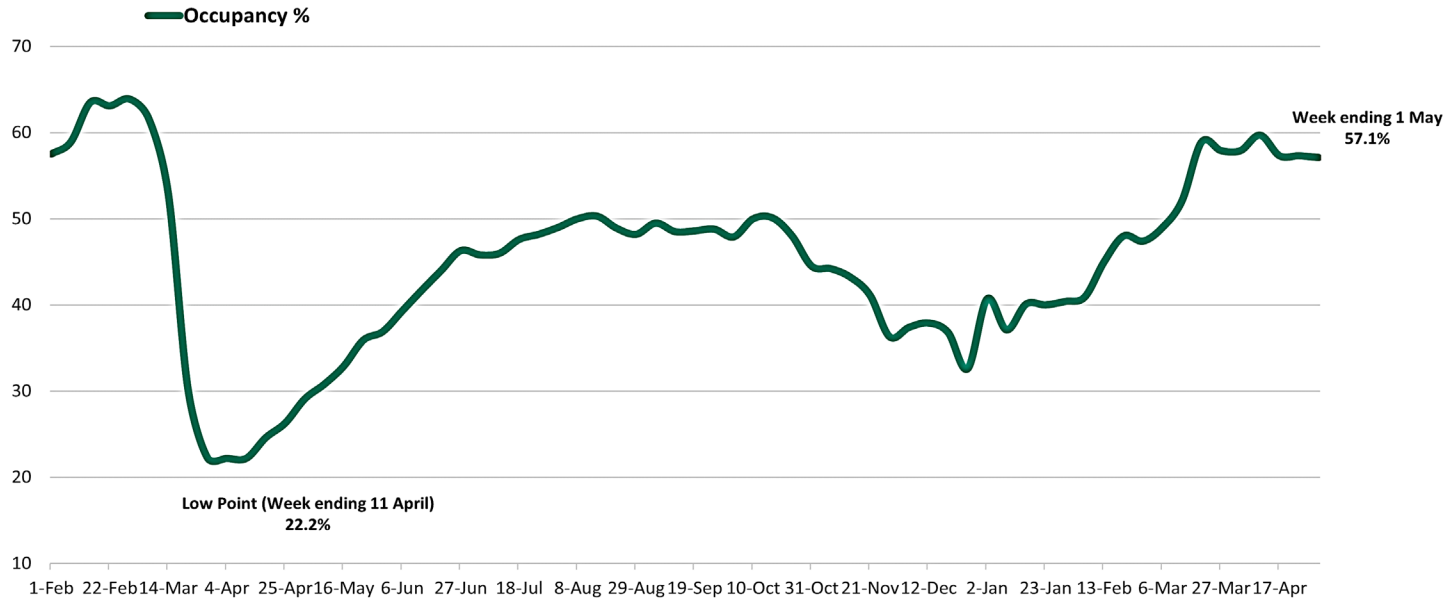


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# Tourism

## U.S. Hotel Occupancy

Weeks ending with specified dates

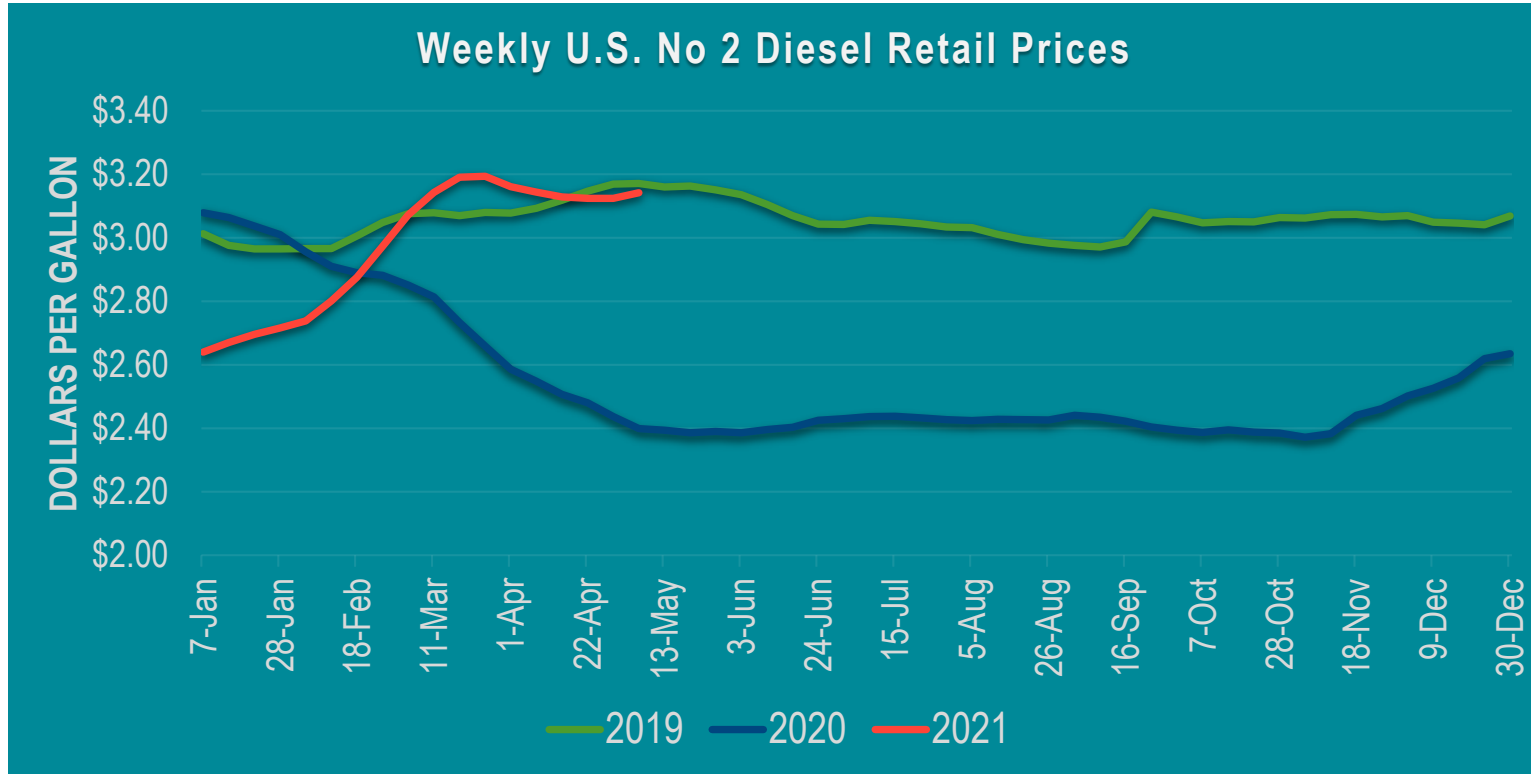


Source: STR. 2021 © CoStar Realty Information, Inc.



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# Fuel Costs

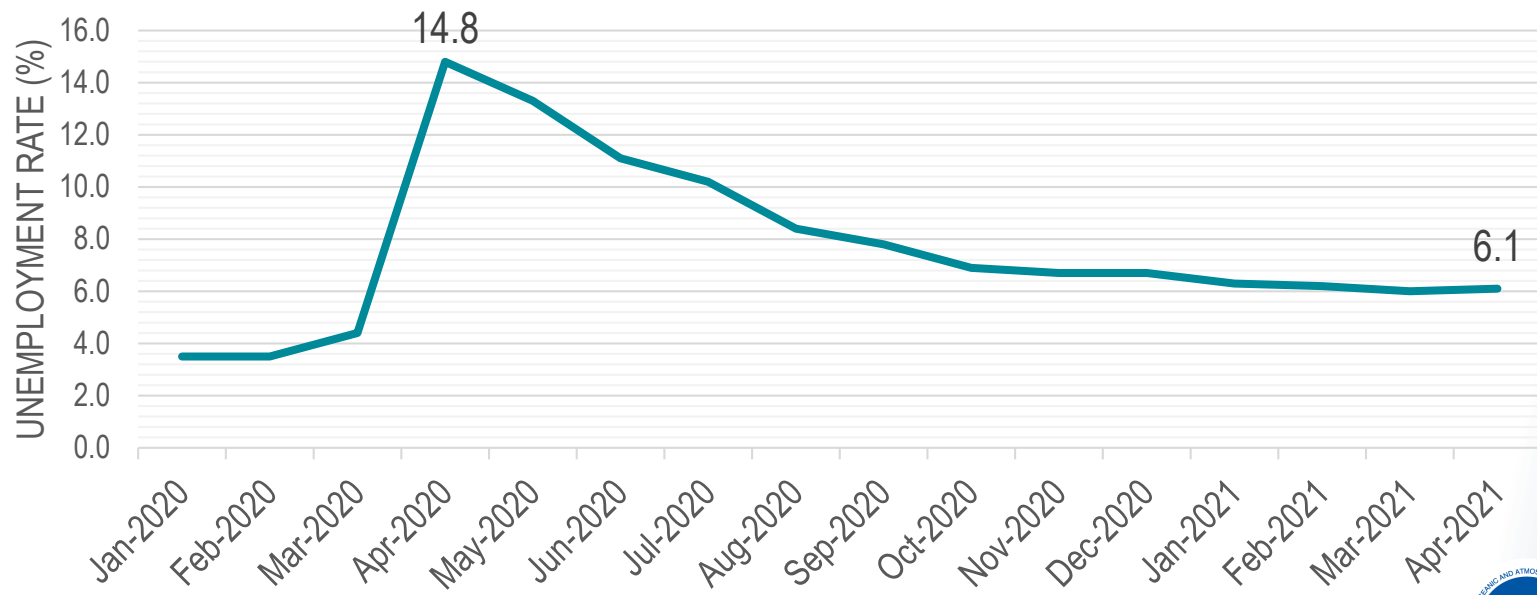


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# Employment Numbers

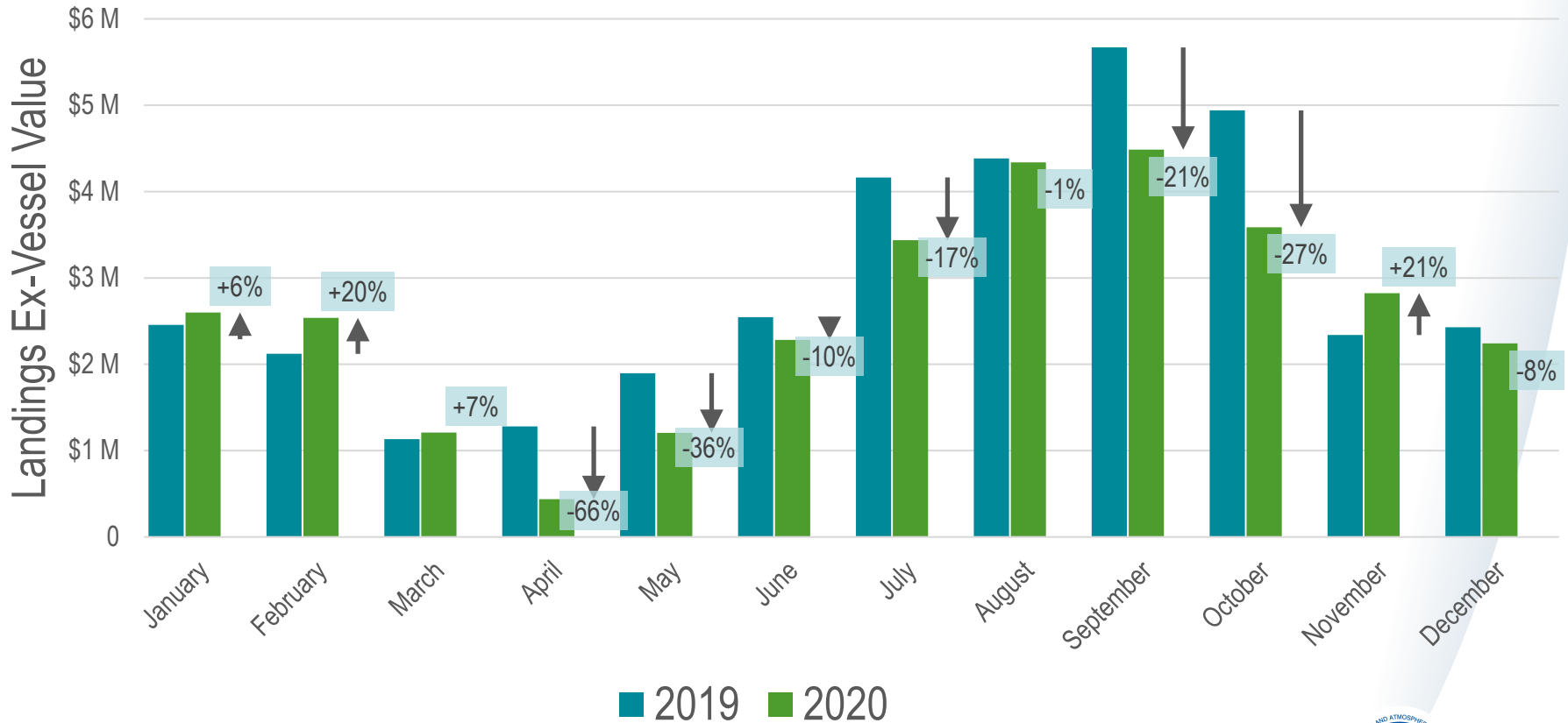
- Insured Unemployment Claims

- Number of people receiving unemployment peaked at 23.1 million as of May 9, 2020
- Claims have decreased to 3.7 million as of April 24, 2021

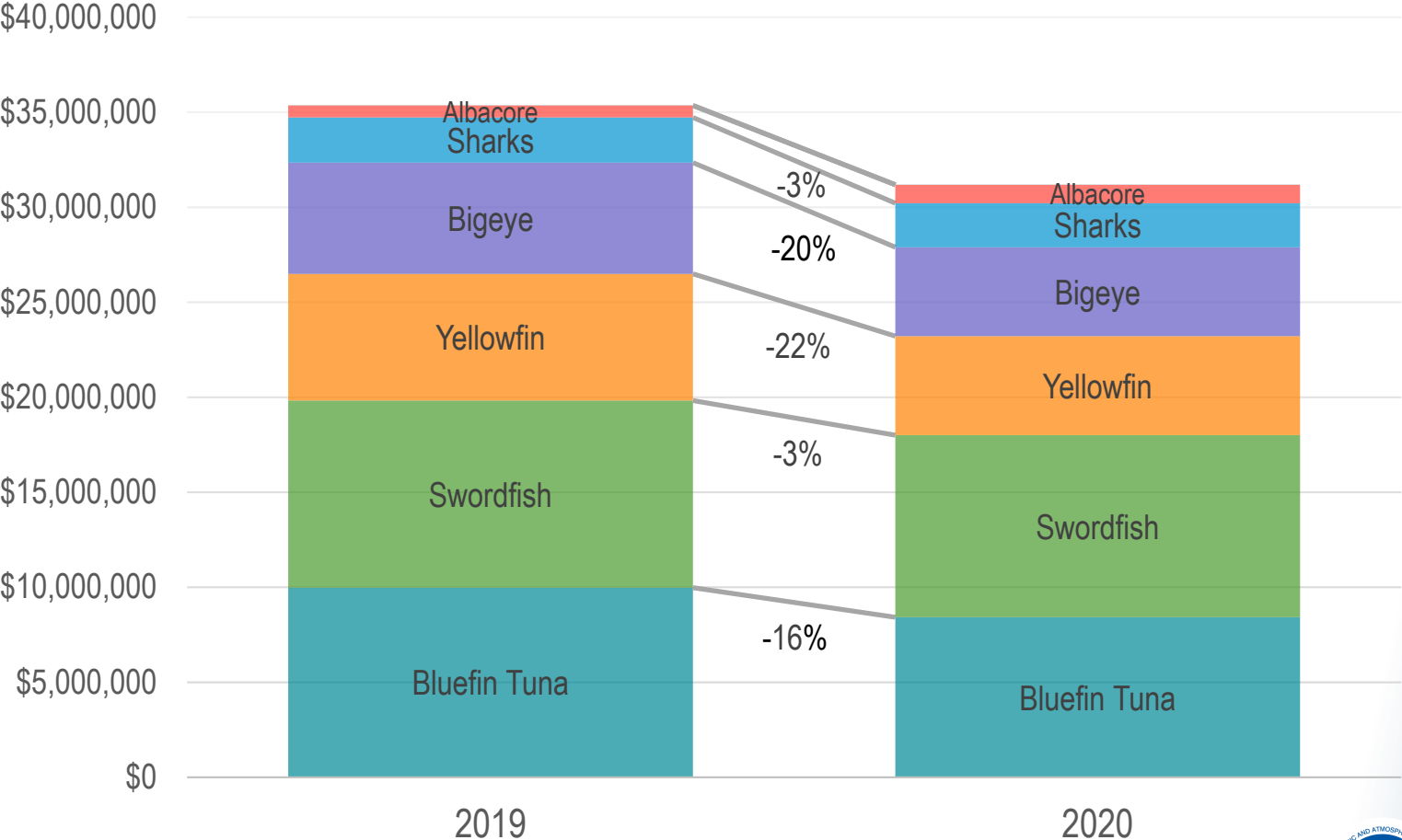




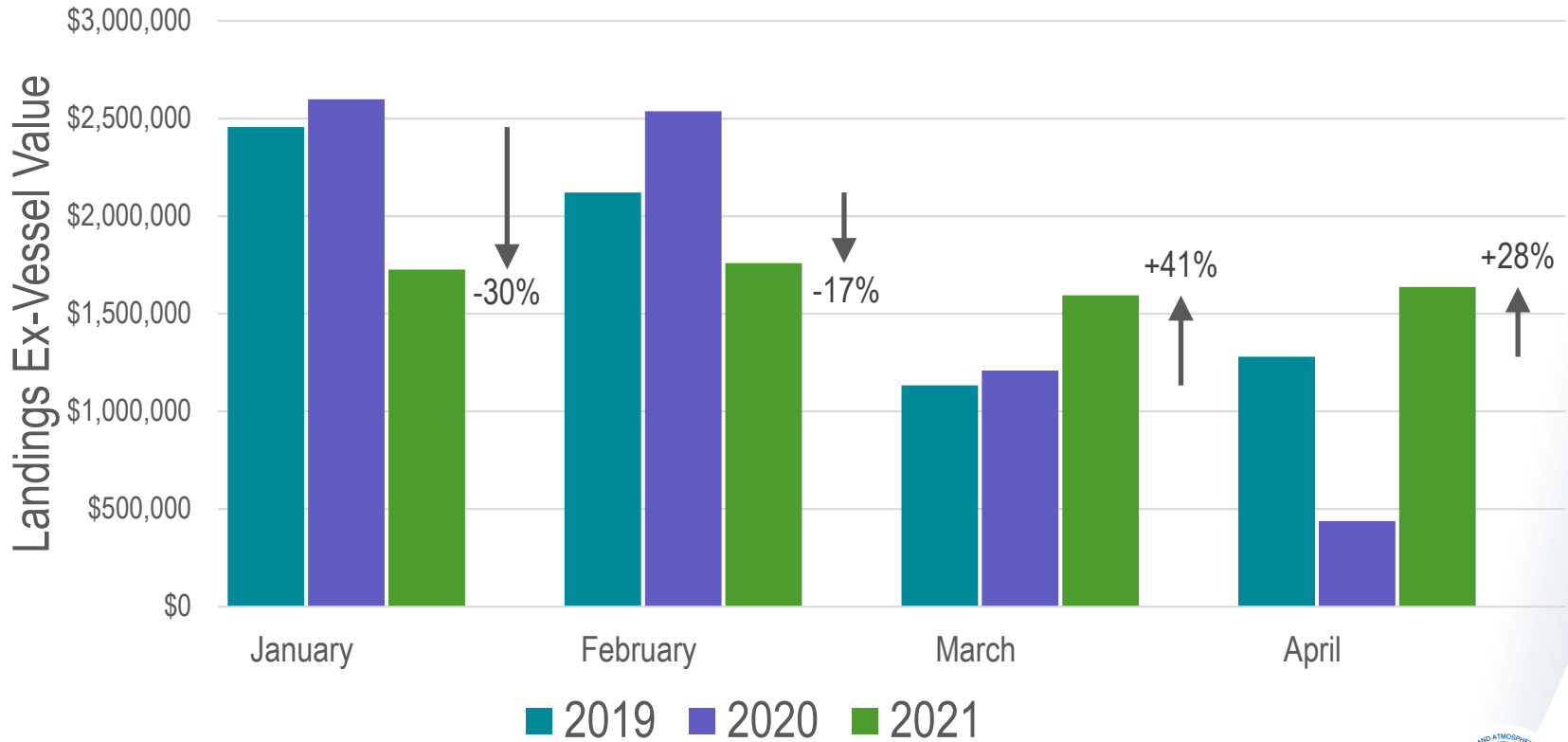
# Atlantic HMS Commercial Landings (Ex-Vessel Value)



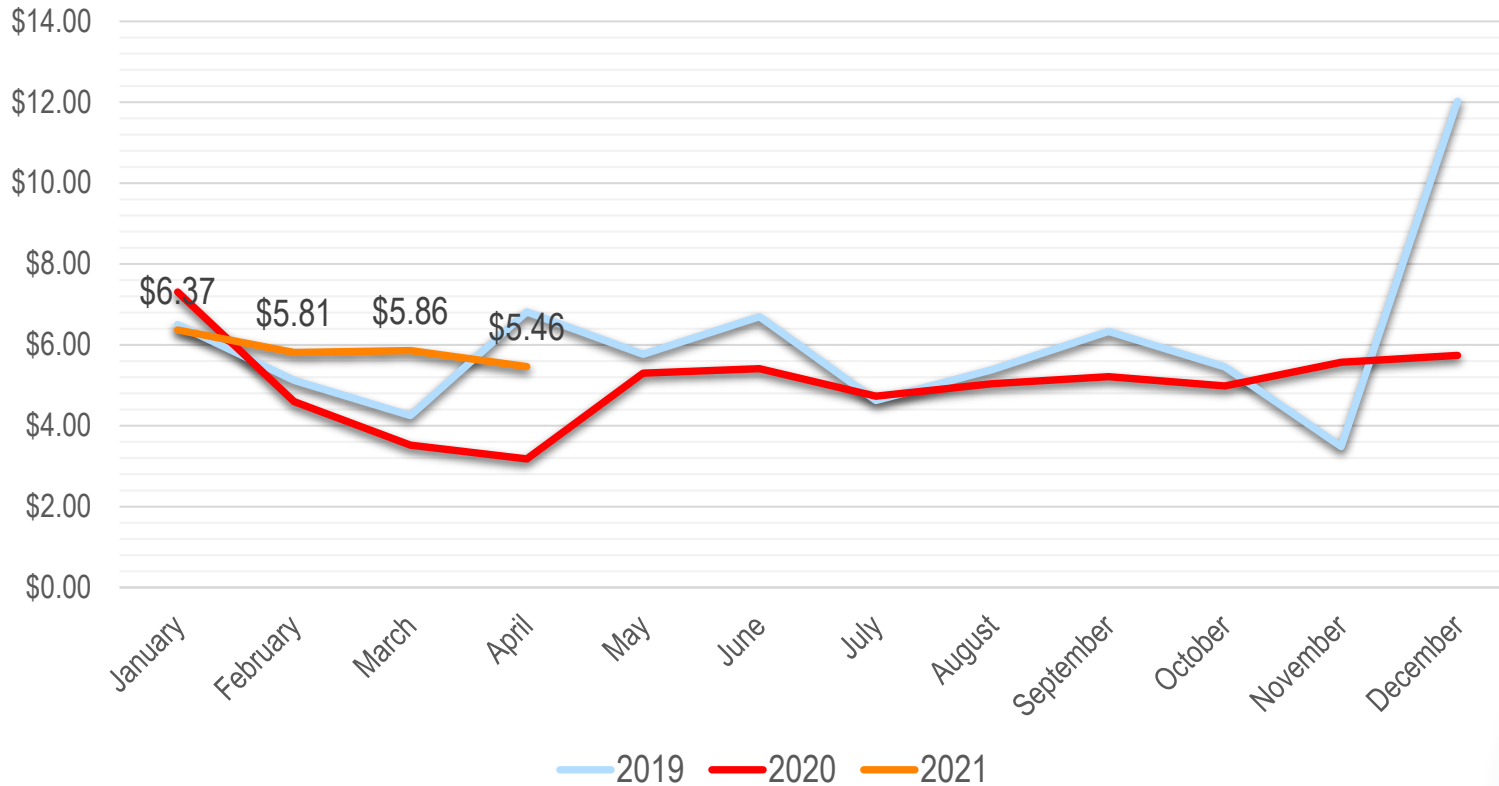
# Species Composition of Ex-Vessel Value (2019 v. 2020)



# Atlantic HMS Ex-Vessel Value — 2021 Update

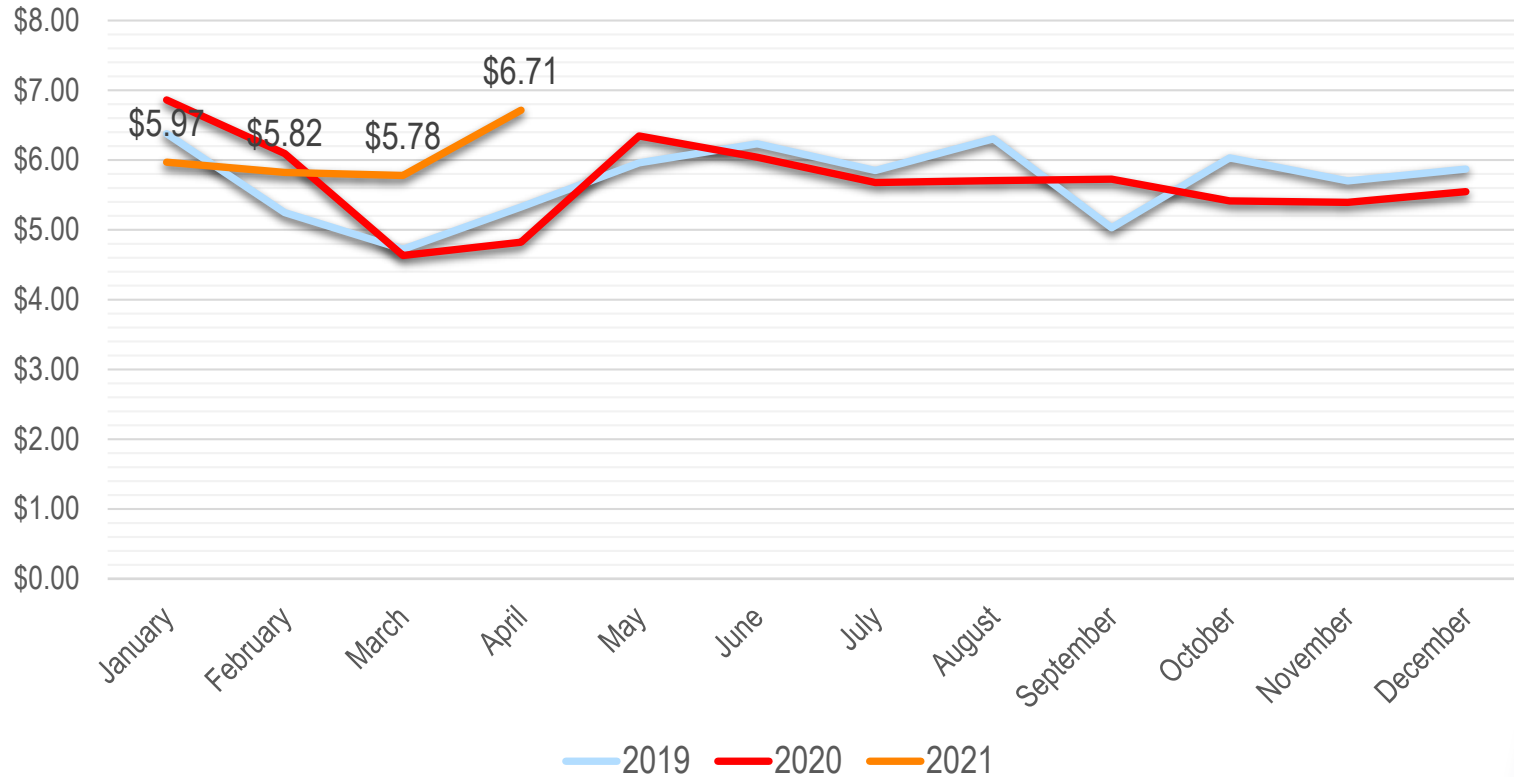


# Bluefin Tuna Average Ex-Vessel Price



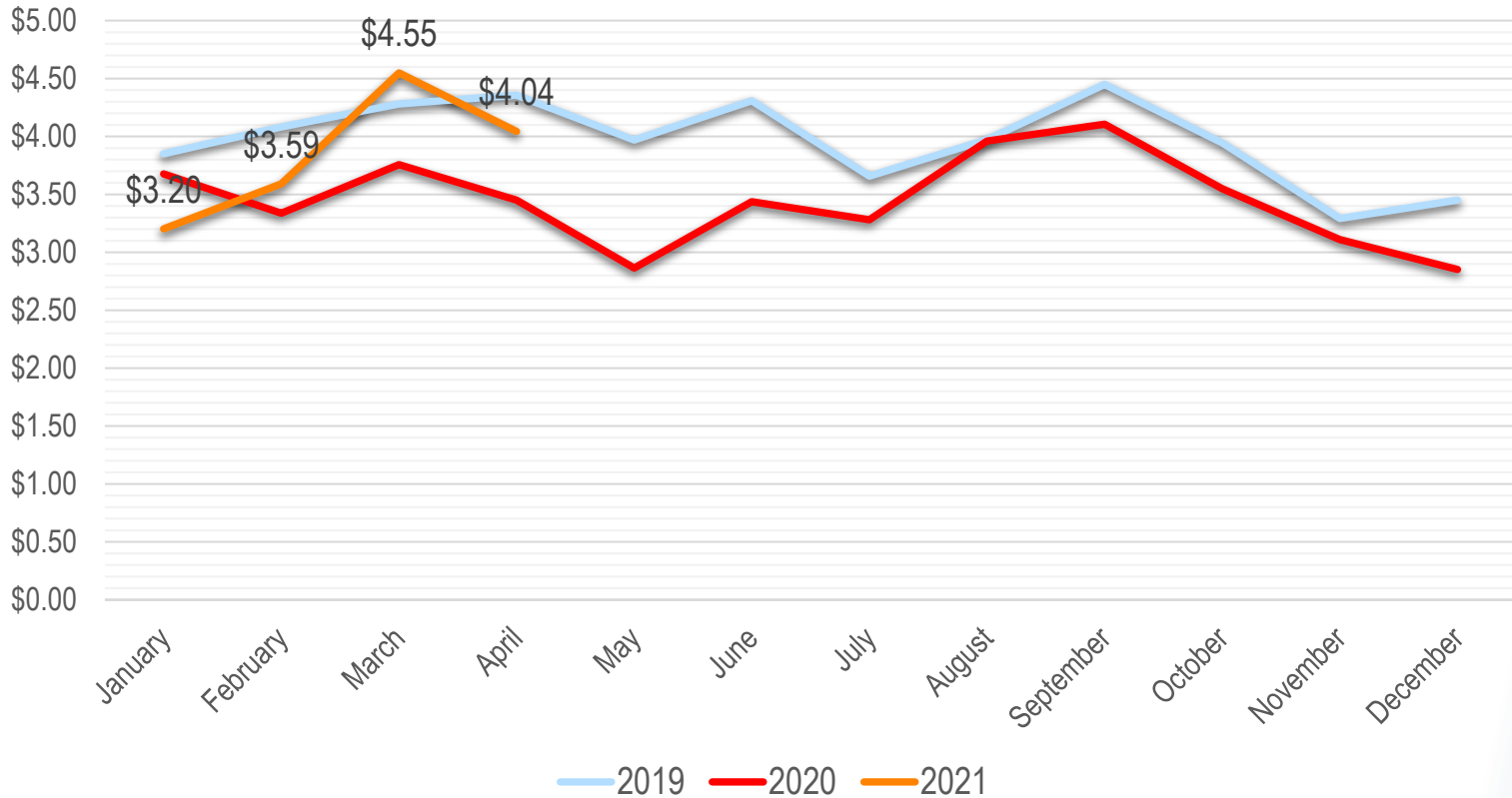
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# Bigeye Tuna Average Ex-Vessel Price

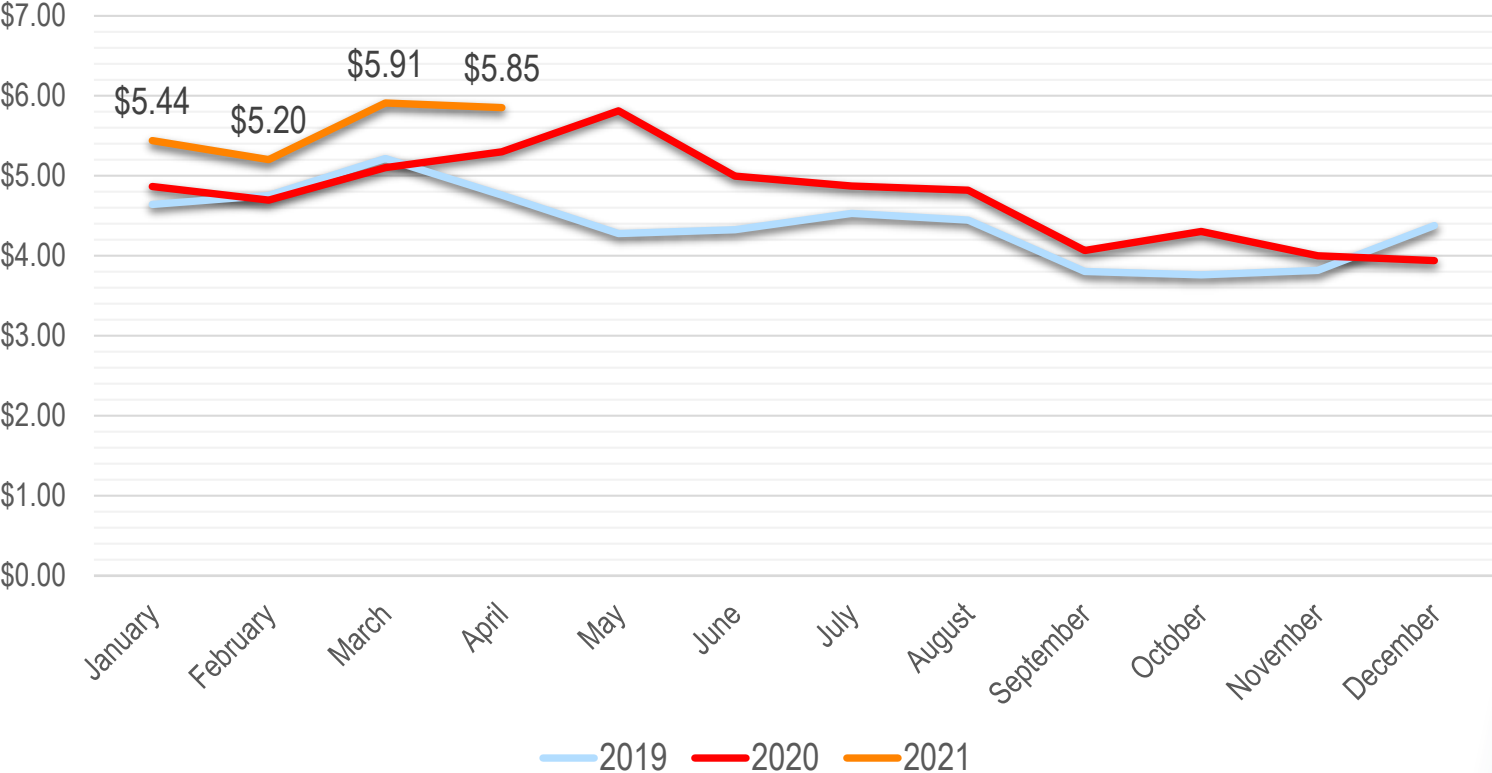


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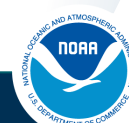
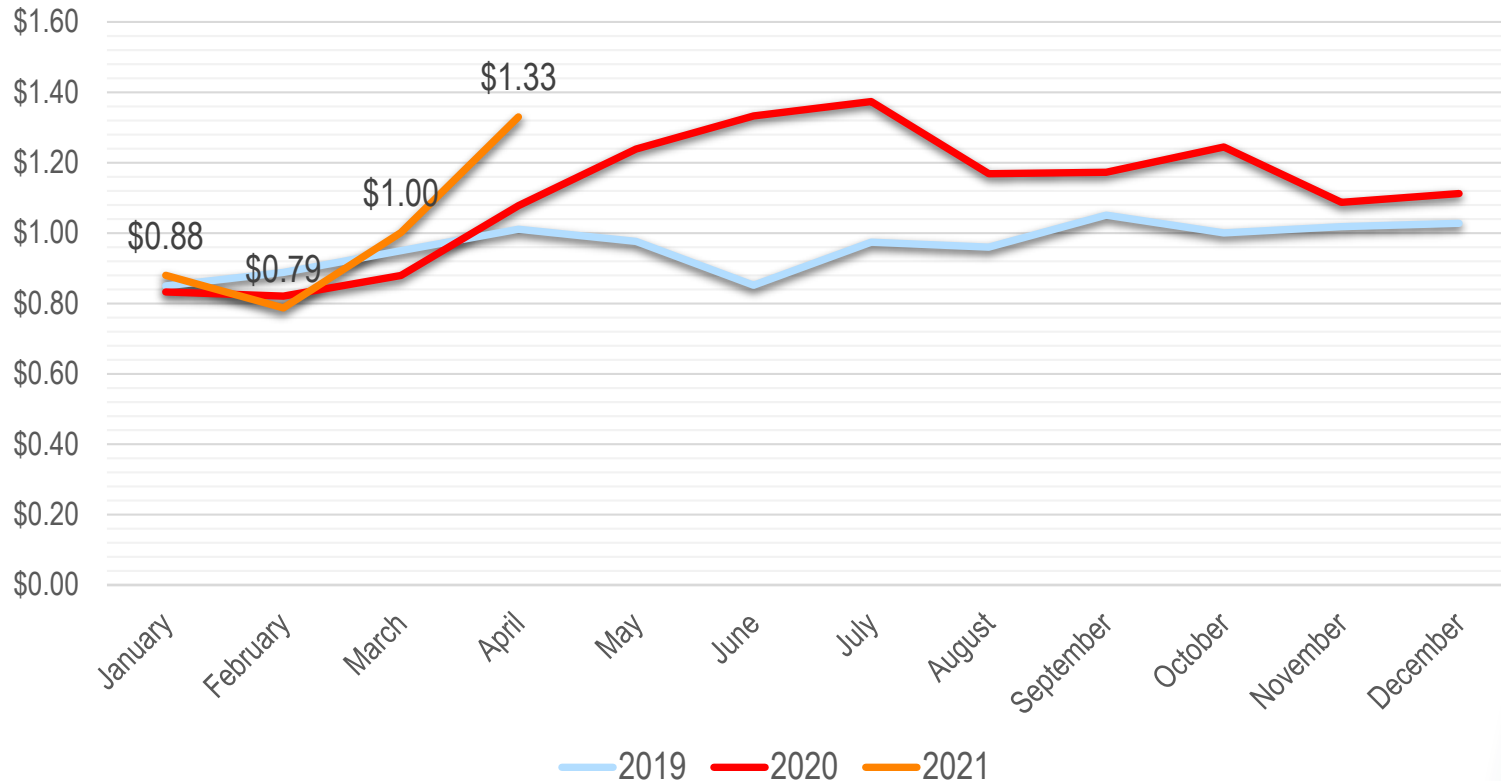
# Yellowfin Tuna Average Ex-Vessel Price



# Swordfish Average Ex-Vessel Price



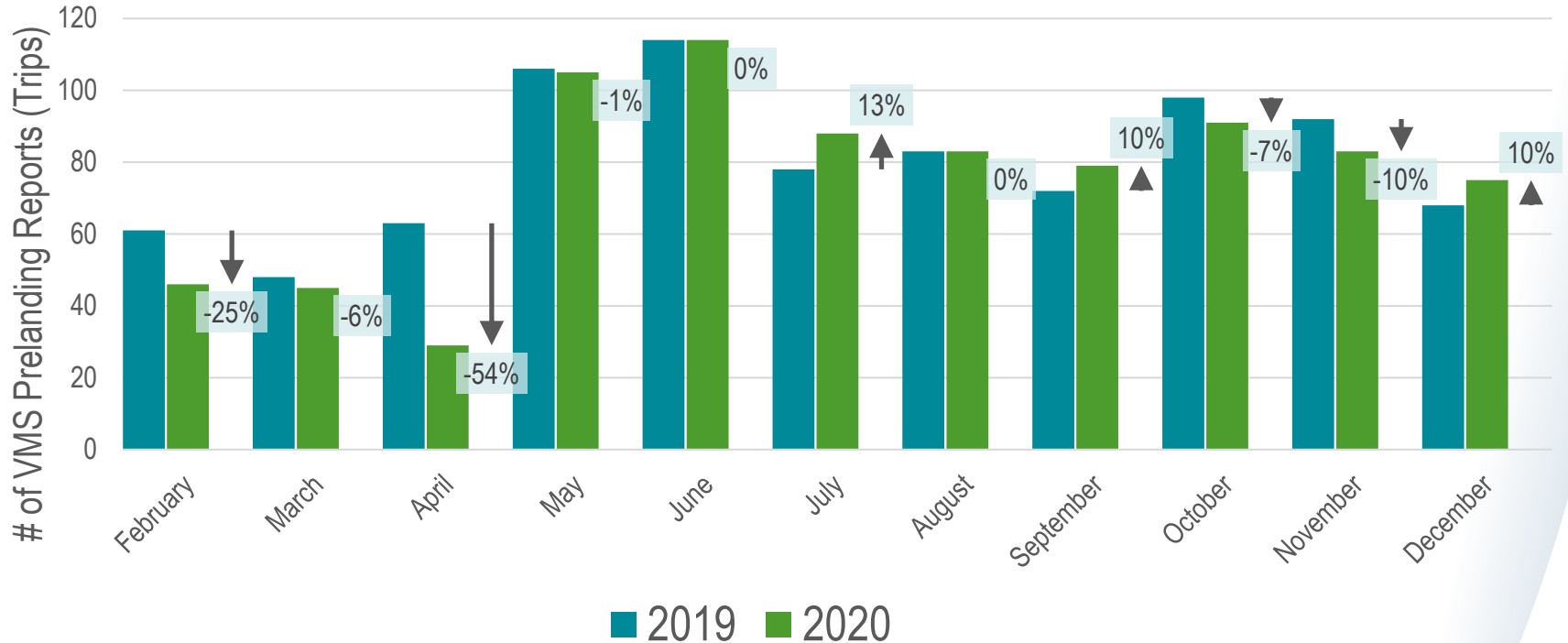
# Blacktip Shark Average Ex-Vessel Price



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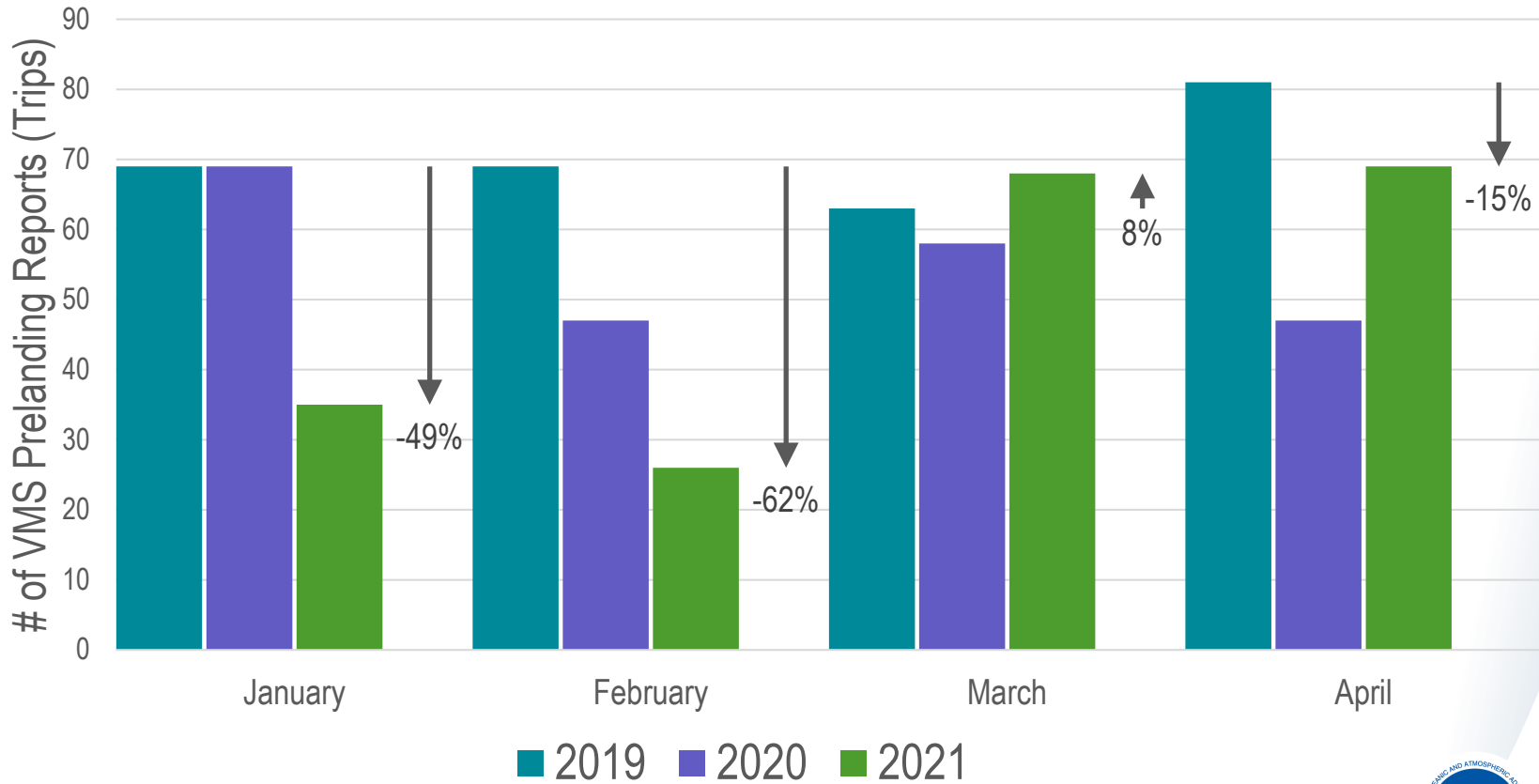
# HMS Commercial Vessel Activity (Trips)



- Based on VMS hail outs for Atlantic HMS vessels.

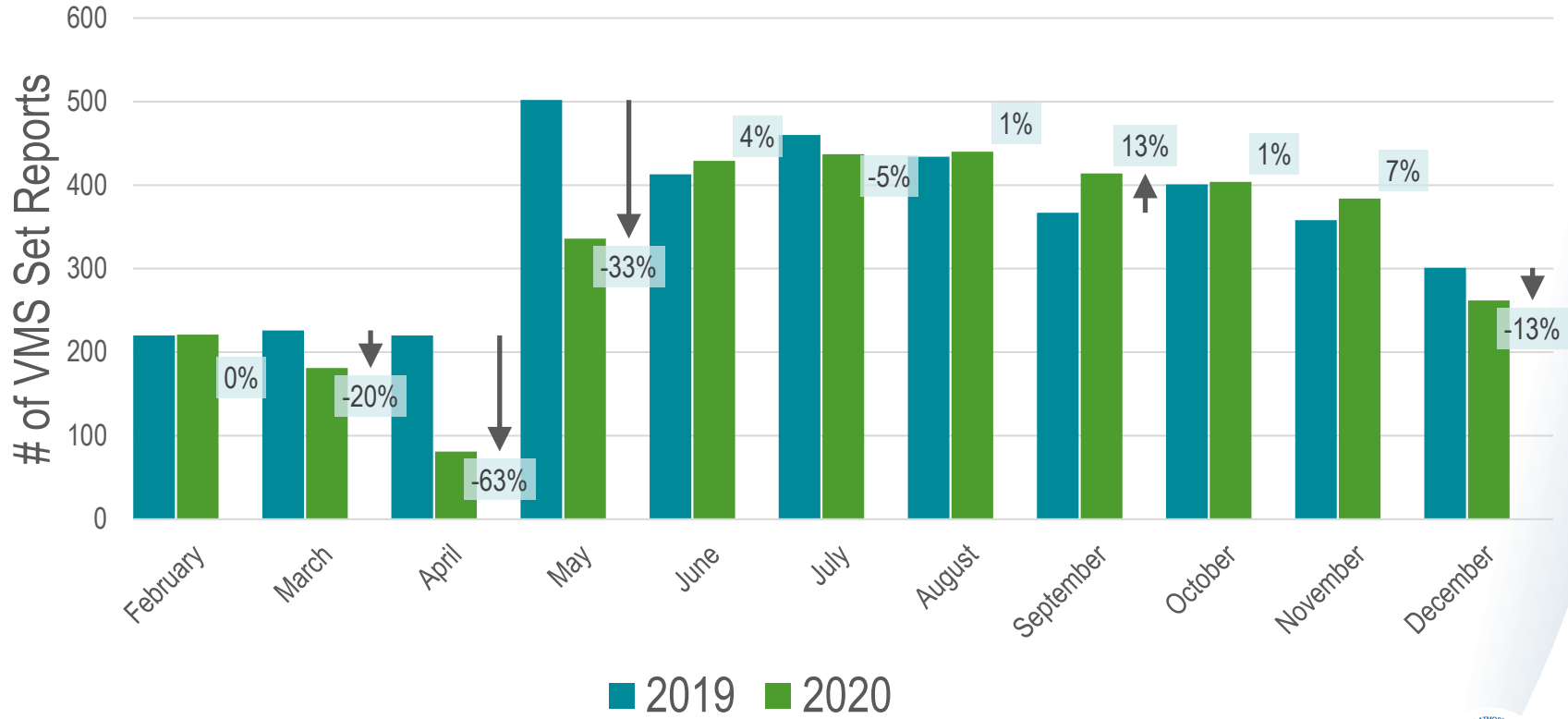


# HMS Commercial Vessel Trips 2021

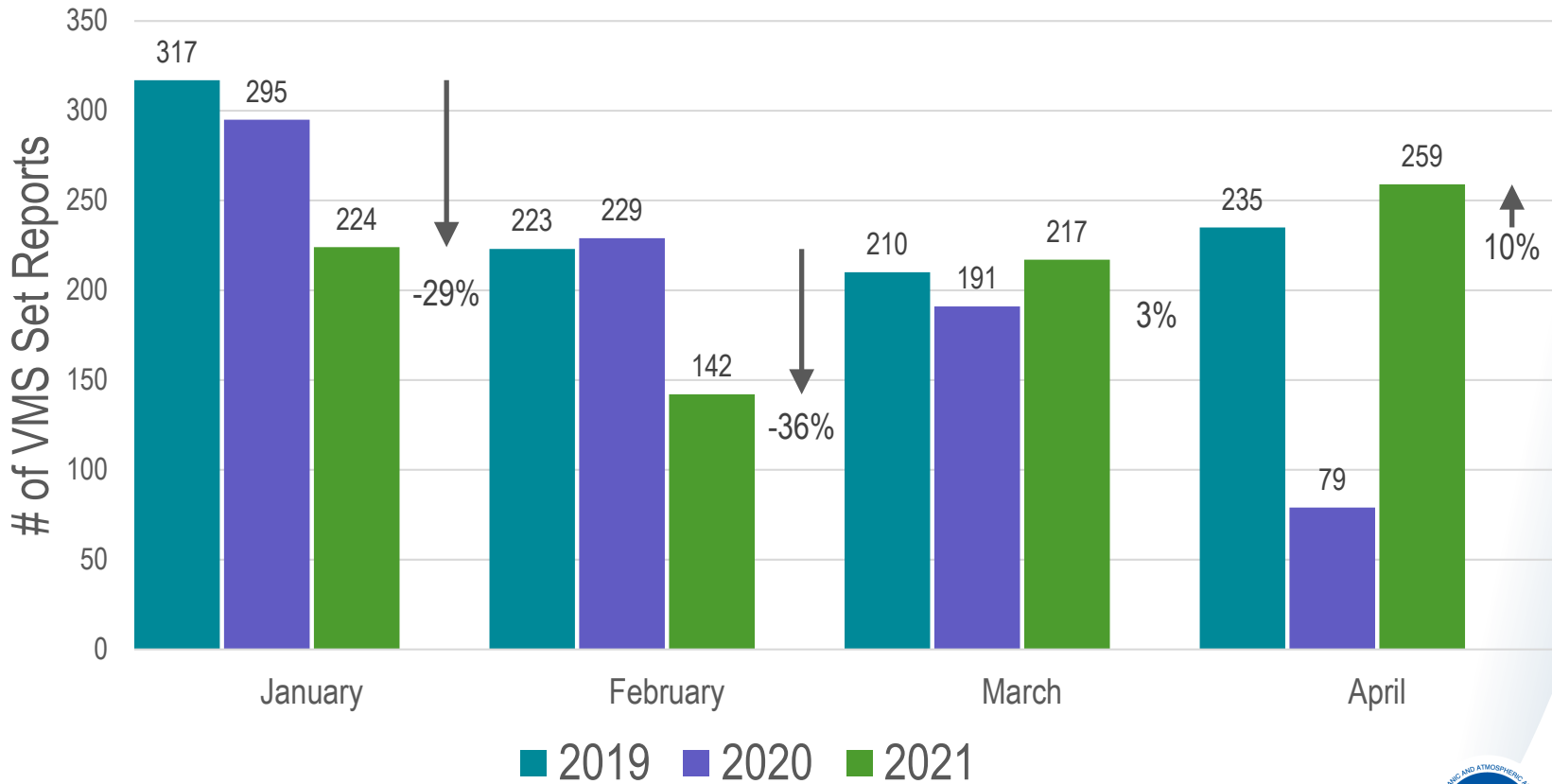


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# Pelagic Longline Fleet Effort for 2020



# Pelagic Longline Fleet Effort for 2021



# HMS Recreational Sector Assessment

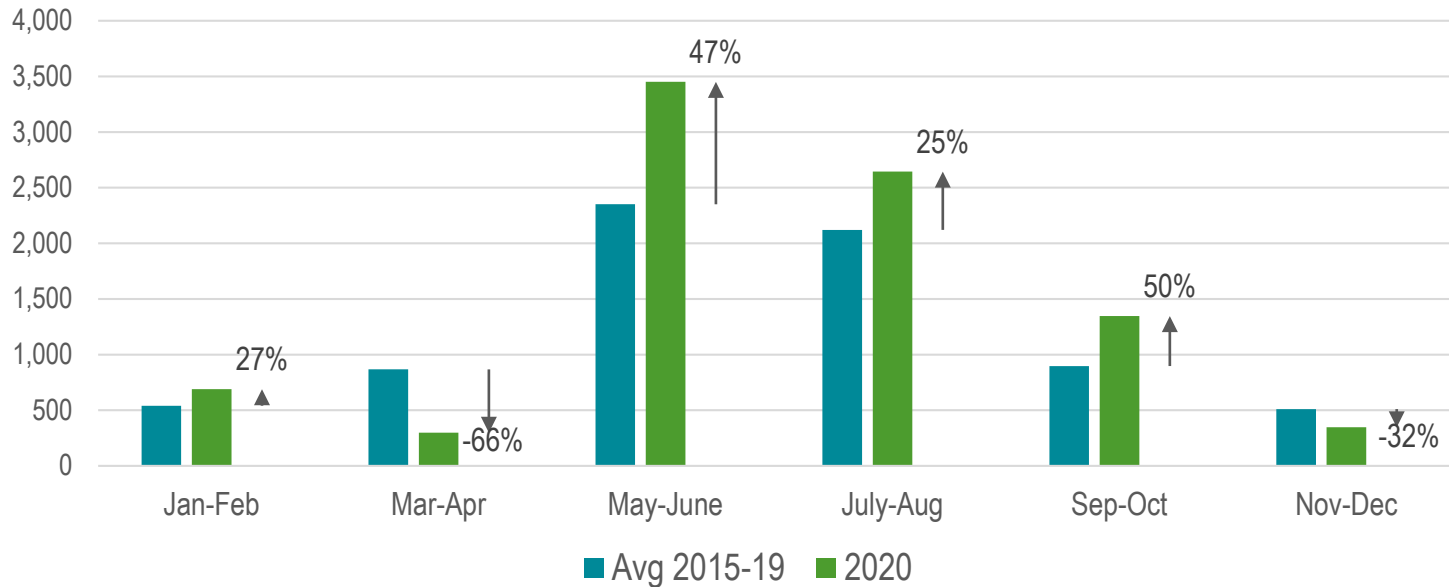
Spring 2020 phone survey focused on Southeast – North Carolina to Texas

- 100% reported their bookings were being impacted starting in mid to late March
- 97% of April trips cancelled with additional cancellations into May and June



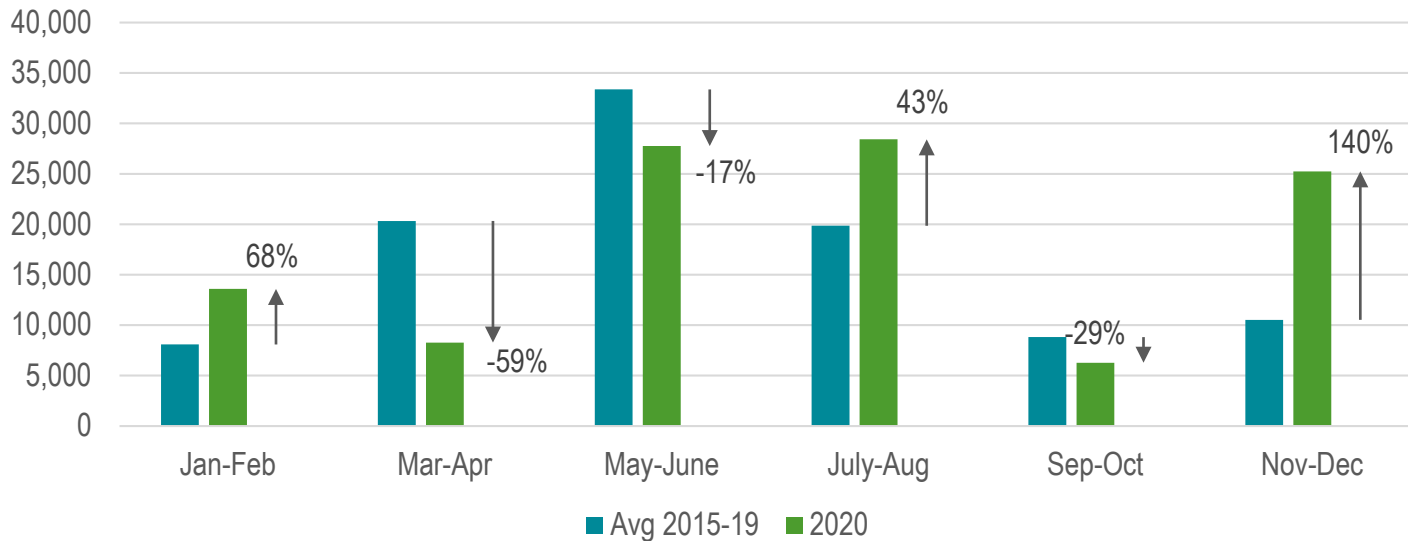
# MRIP South Atlantic HMS For-Hire Effort

- Overall increase in for-hire vessel effort of 20% for 2020, and 33% from May to December



# MRIP South Atlantic HMS Private Boat Effort

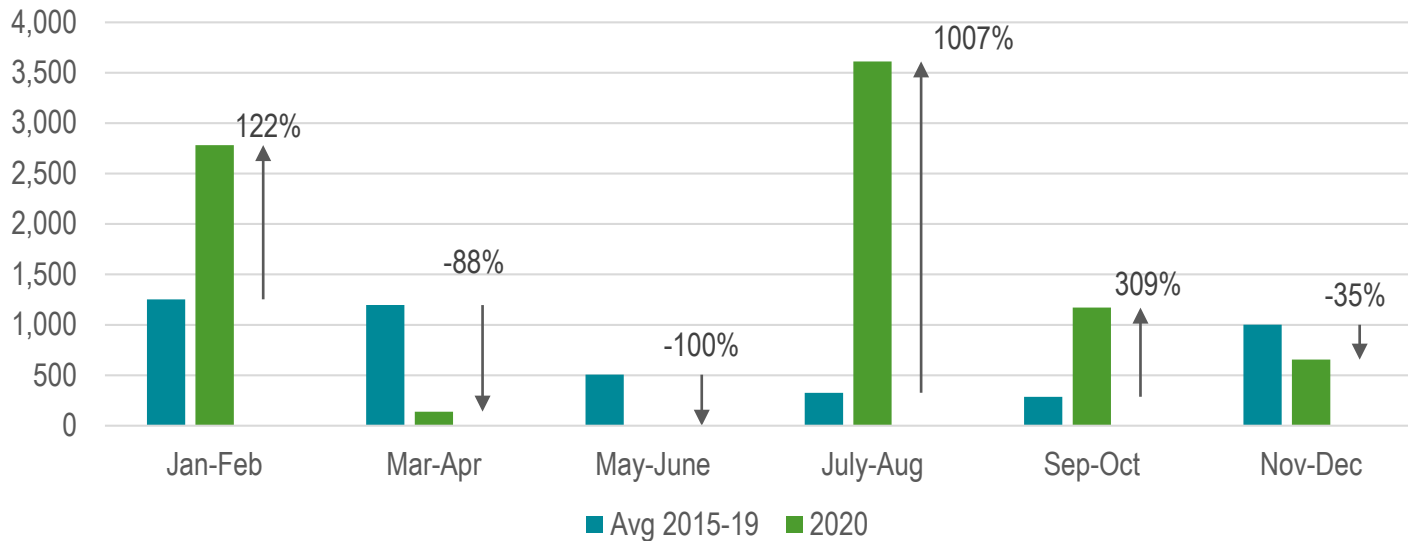
- Private vessel effort for HMS varied significantly compared to previous 5-year average with overall increase of only 9%, and 21% from May through December.



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# MRIP Gulf of Mexico HMS For-Hire Effort

- Gulf HMS for-hire effort estimates are highly variable
- Large increases seen in last summer and fall

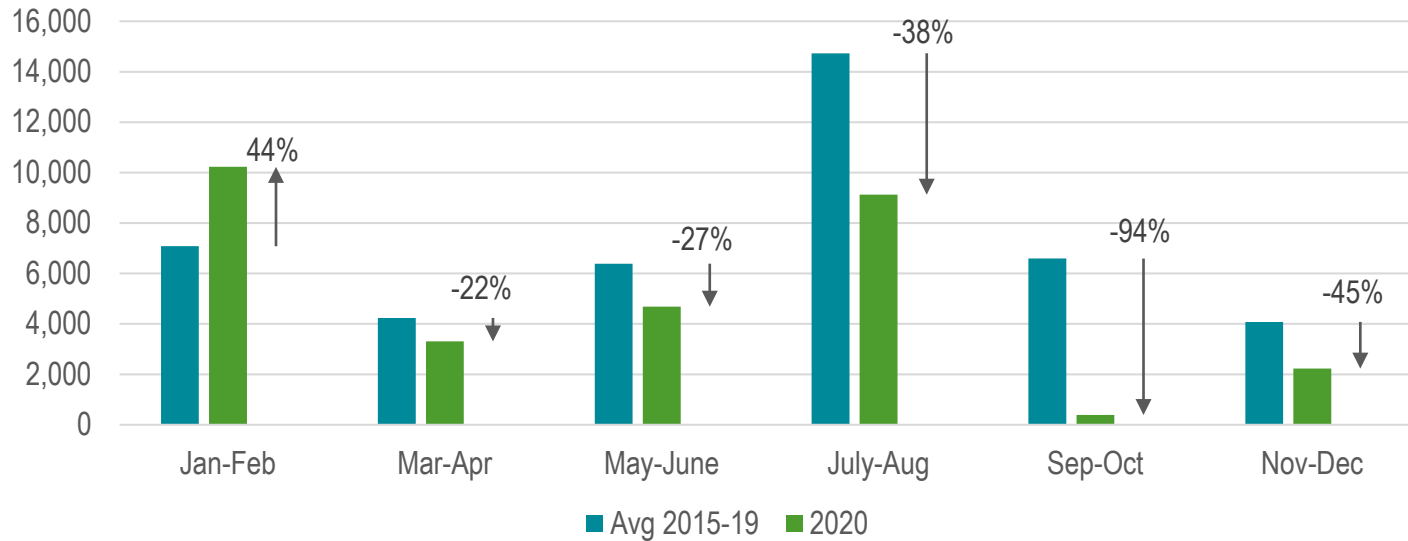


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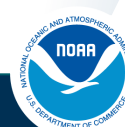
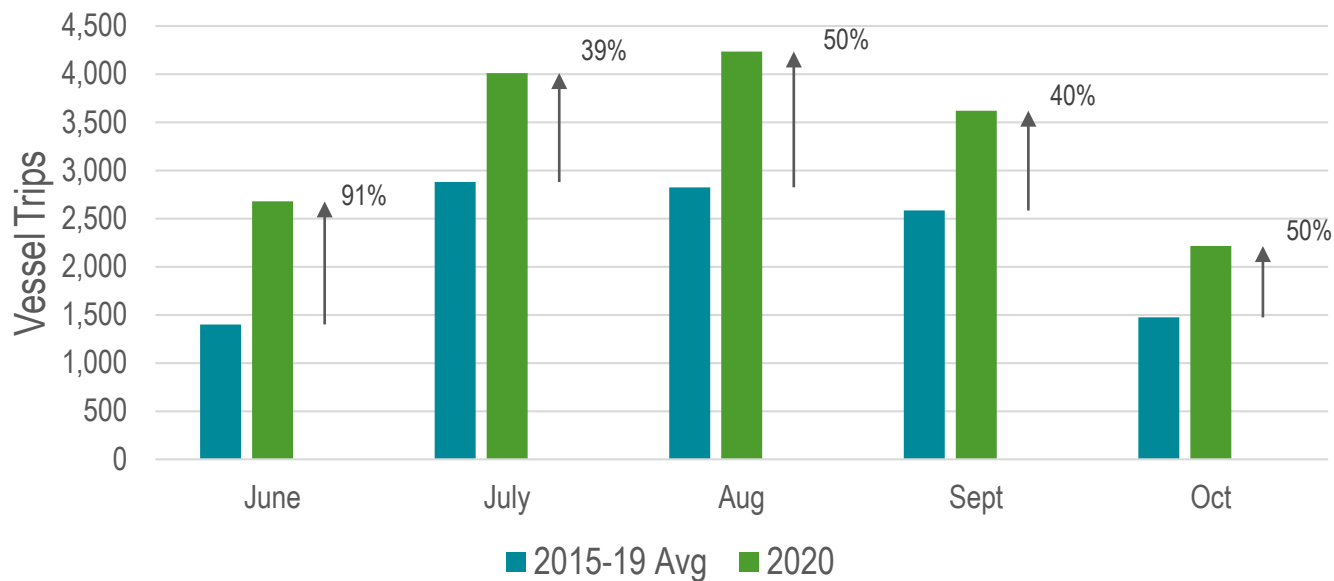
# MRIP Gulf of Mexico HMS Private Boat Effort

- Private boat HMS effort in the Gulf never rebounded, declined 31% for the year



# LPS Charter Vessel Trips by Month

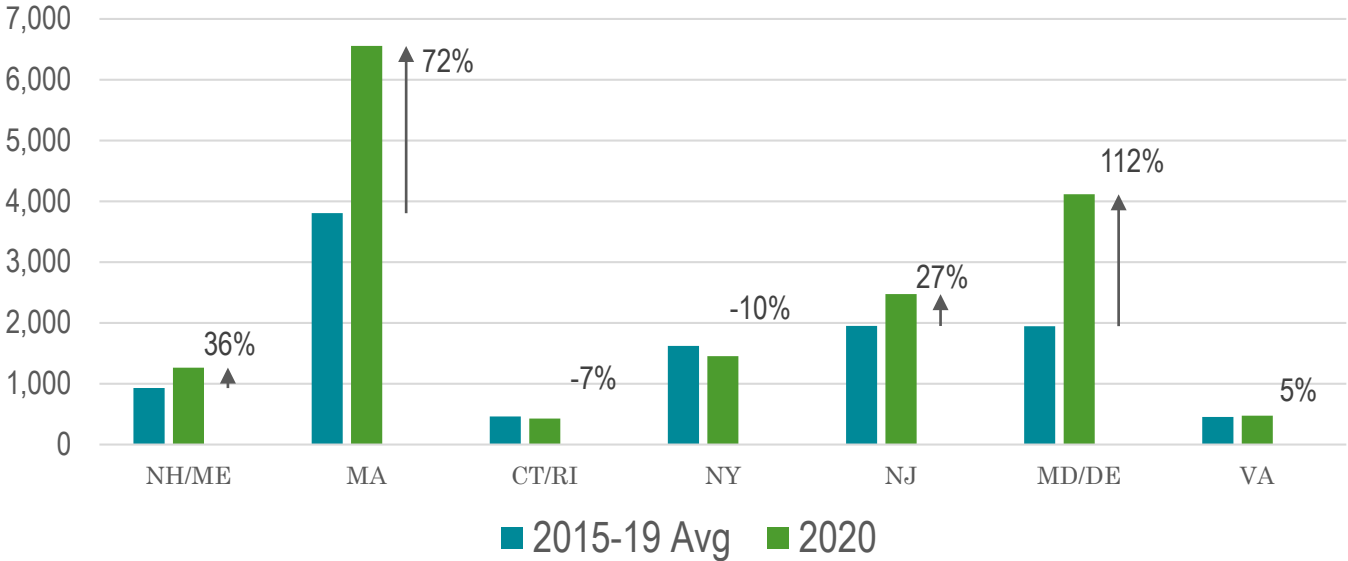
- LPS data shows a 50% increase in overall HMS for-hire effort in 2020 compared to the previous 5-year average



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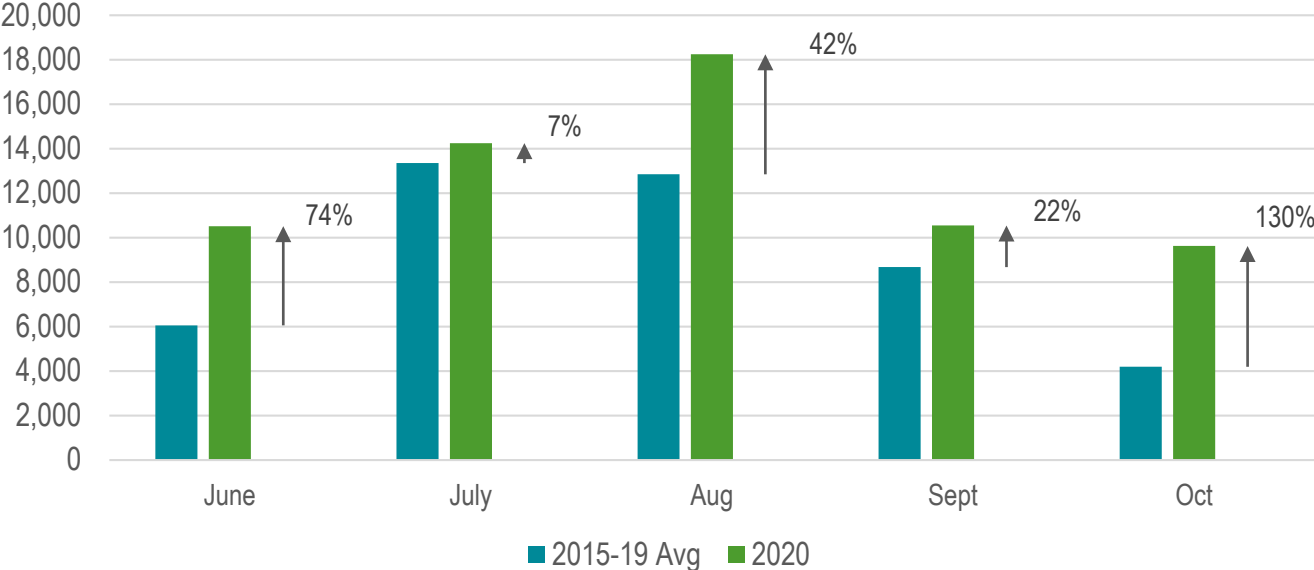
# LPS Charter Vessel Trips by State

- Biggest effort increases in Massachusetts and Maryland/Delaware
- States with reduced effort were within range of the previous 5-years



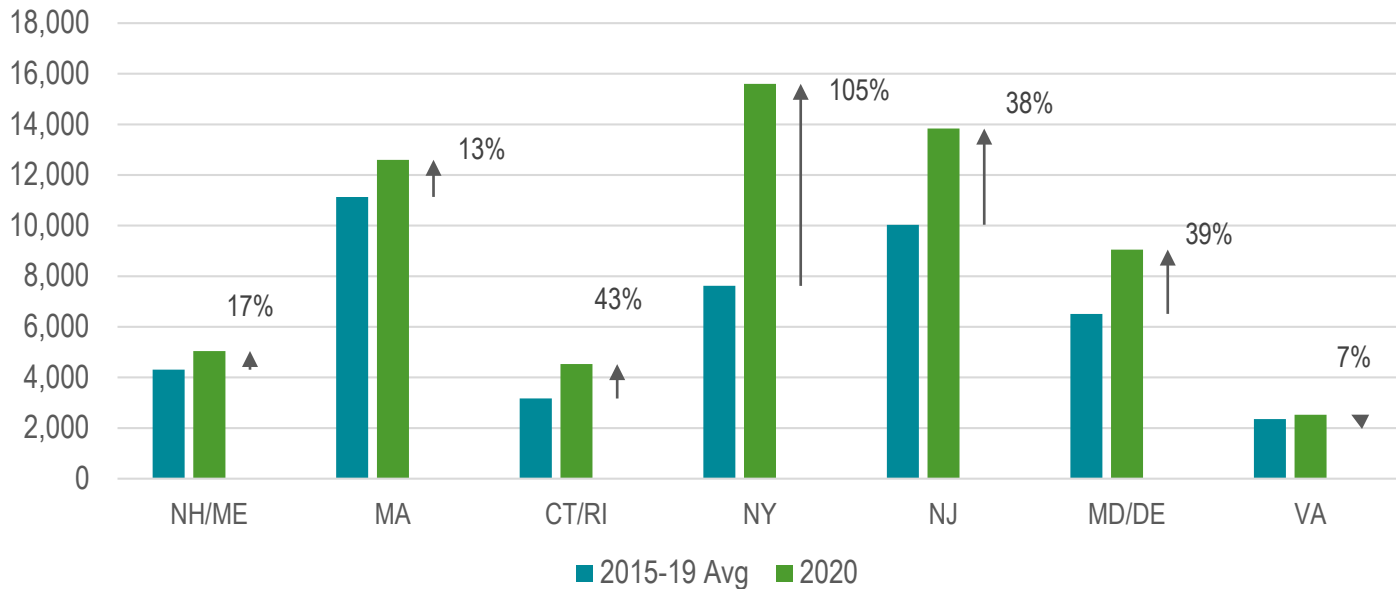
# LPS Private Vessel Trips by Month

- LPS private vessel effort increased 40% in 2020 compared to previous 5-year average



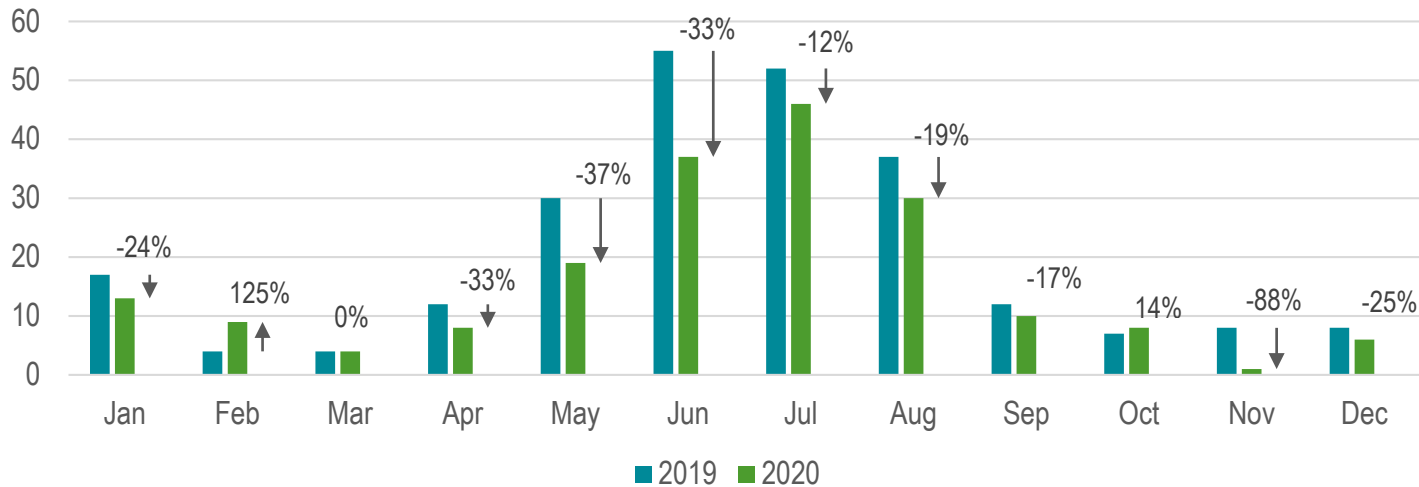
# LPS Private Vessel Trips by State

- Private vessel effort more than doubled in New York
- Substantial increases in CT/RI, MD/DE, and New Jersey



# HMS Tournament Impacts

- 8 tournament cancellations and 5 postponements
- Compared to 2019, 55 fewer tournaments were registered in 2020; sharp Nov decline driven by Caribbean restrictions



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# Resources

## NMFS COVID-19 Information Page

- <https://www.fisheries.noaa.gov/national/noaa-fisheries-coronavirus-covid-19-update>

## NMFS COVID-19 Regional Snapshots

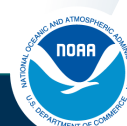
- <https://www.fisheries.noaa.gov/resource/document/updated-impact-assessment-covid-19-crisis-us-commercial-seafood-and-recreational>

## U.S. Government COVID-19 Resources

- <https://www.usa.gov/coronavirus>

## State Fishery Agency Responses to COVID-19

- <https://www.takemefishing.org/tmf/assets/banners/covidstatesystem/covidstatesystem.html?lang=en&pageType=license>



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# Comments & Questions

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