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# 2021 HMS Fisheries Economic Situation Report

HMS Advisory Panel Meeting  
September 8, 2021

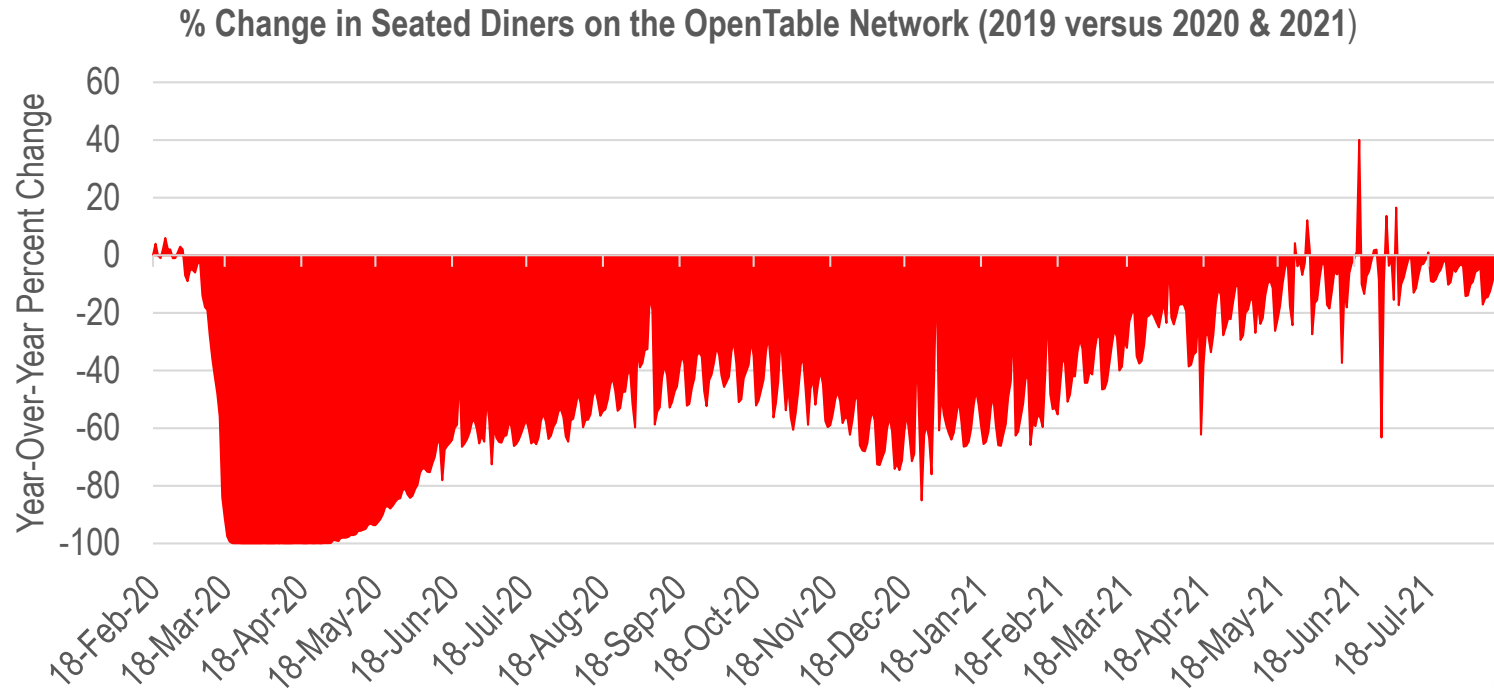
# Outline

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



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# Regional Restaurant Sales



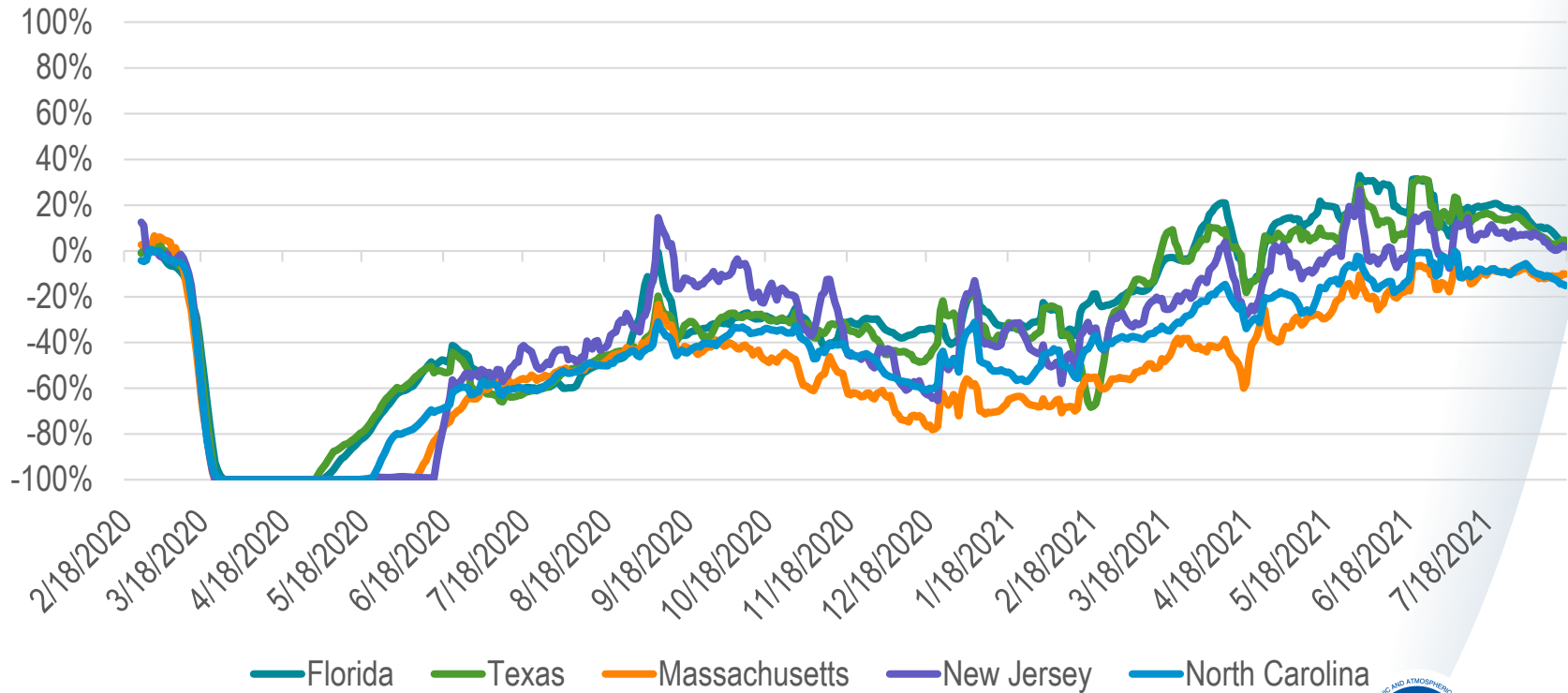
- **68%** of all consumer expenditures for fishery products were made at food service establishments



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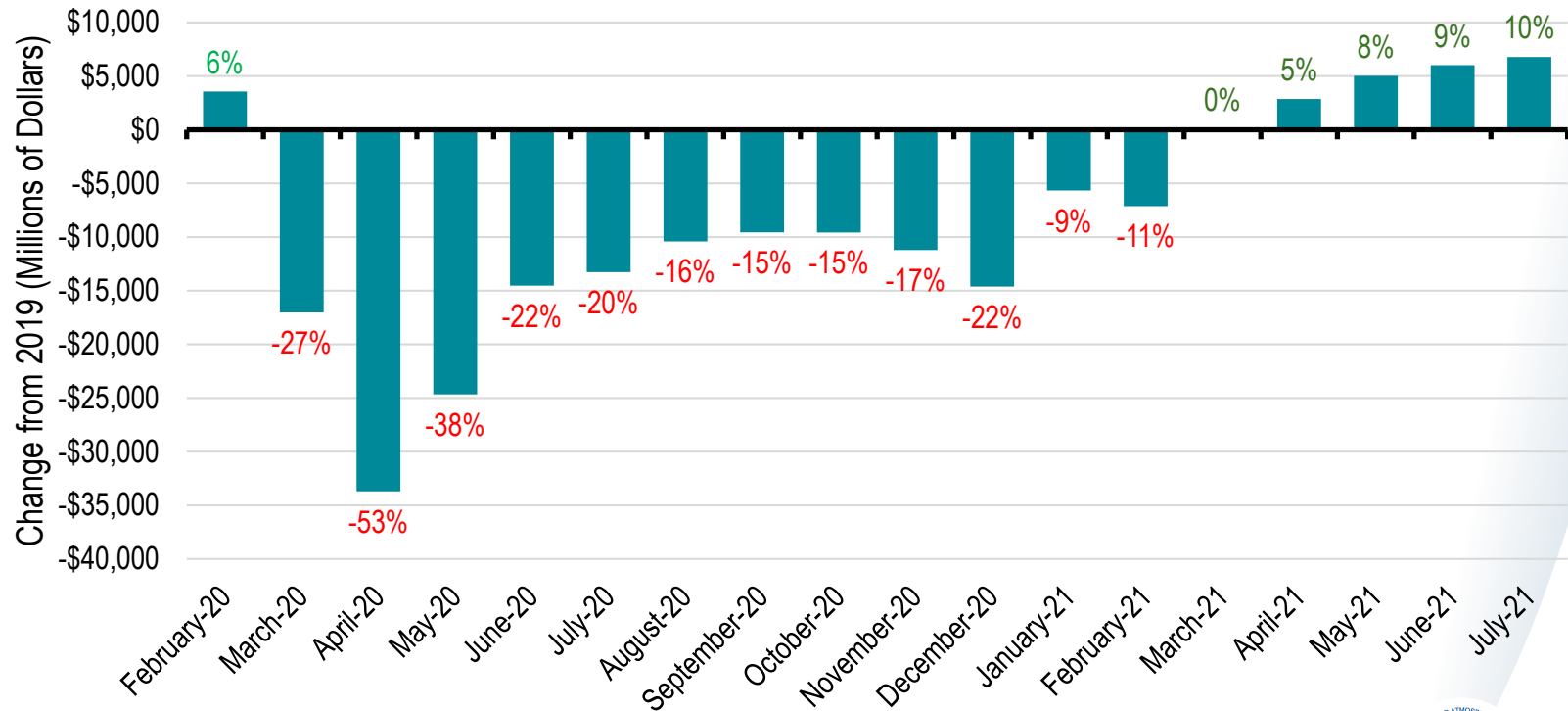
# Regional Restaurant Sales

7-Day Moving Average % Change in Seated Dinners on the OpenTable Network  
(2019 versus 2020 & 2021)



# U.S. Restaurant and Bar Sales

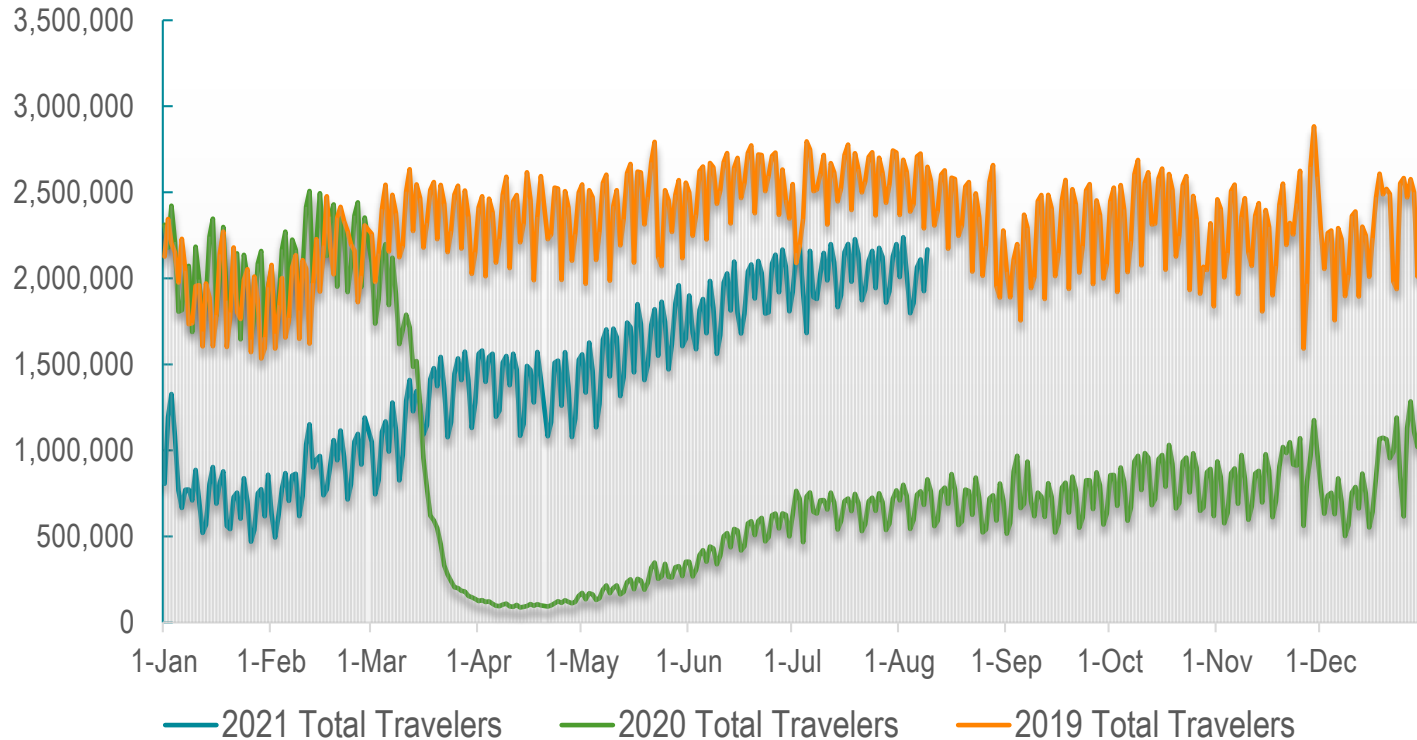
## Change in Sales at Food Service & Drinking Places



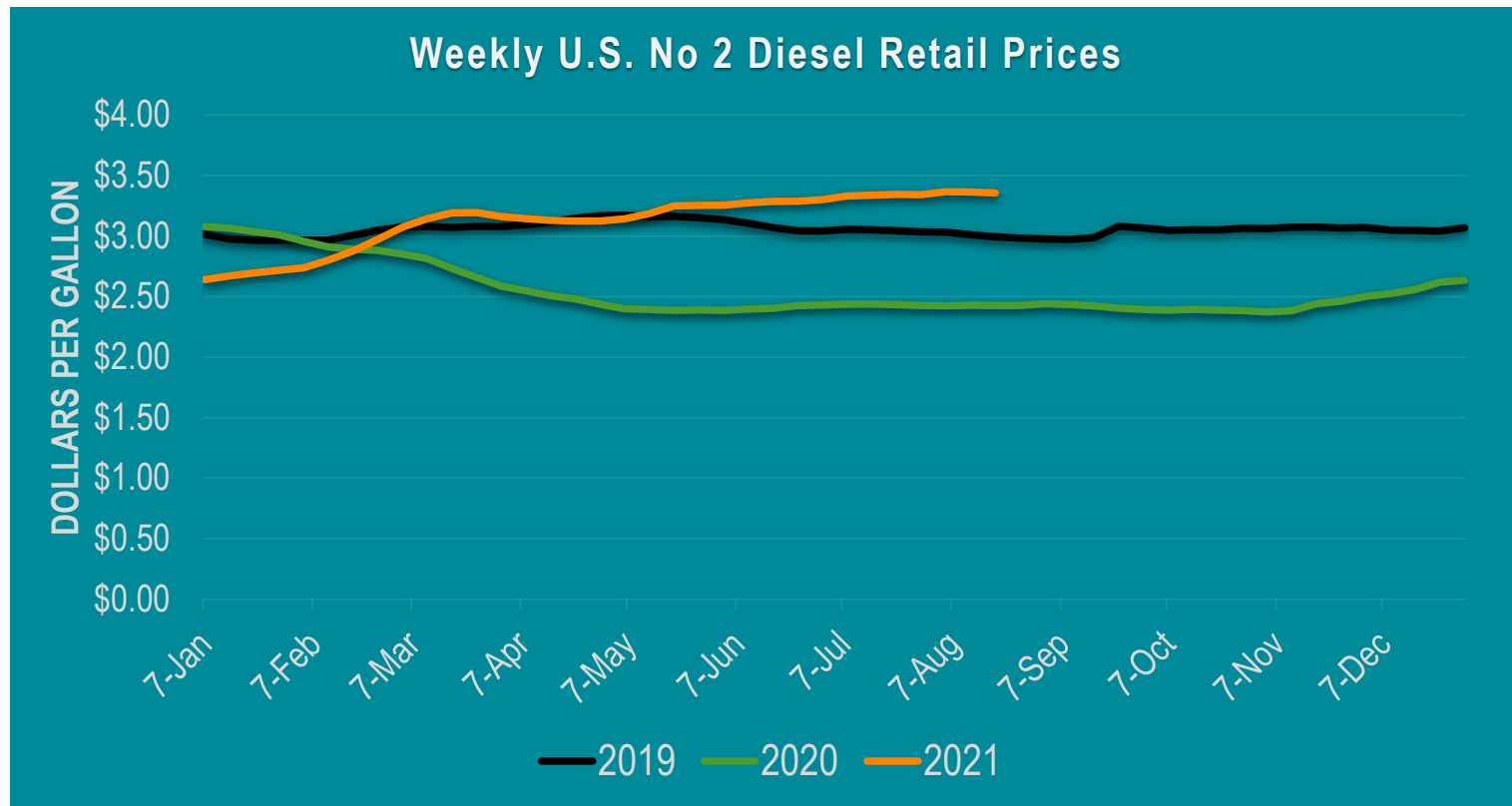
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# Travel

TSA Checkpoint Travel Numbers for 2021, 2020, and 2019



# Fuel Costs

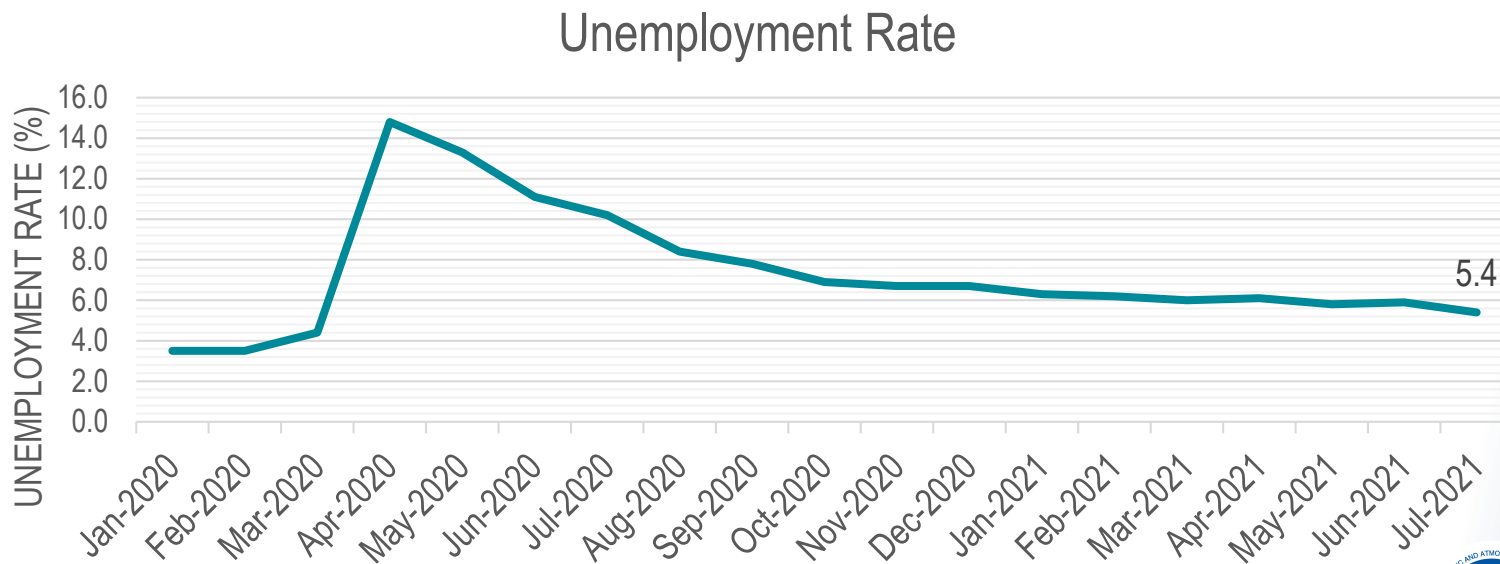


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# Employment Numbers

- Insured Unemployment Claims

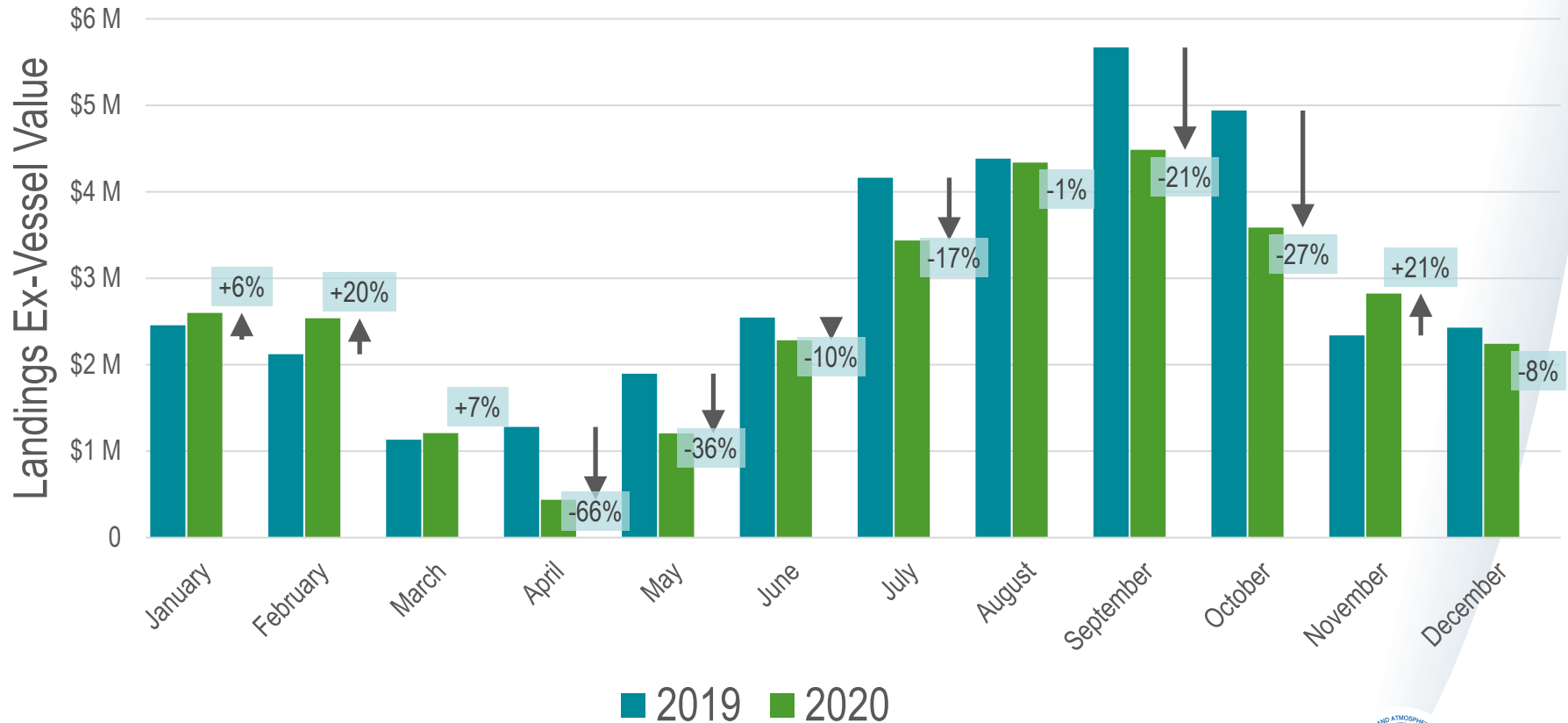
- Number of people receiving unemployment peaked at 23.1 million as of May 9, 2020
- Claims have decreased to 2.8 million as of August 7, 2021



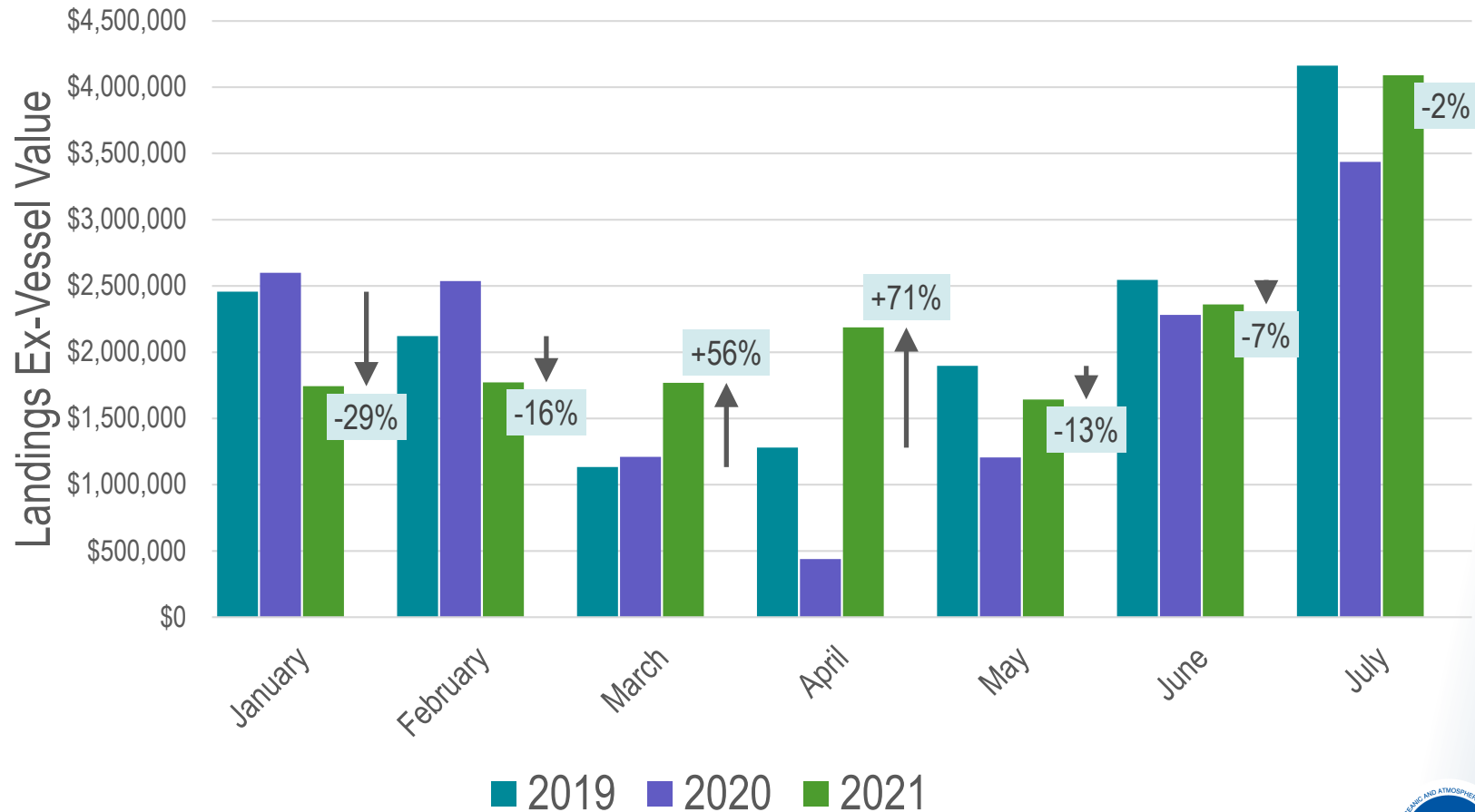
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# Atlantic HMS Commercial Landings (Ex-Vessel Value)

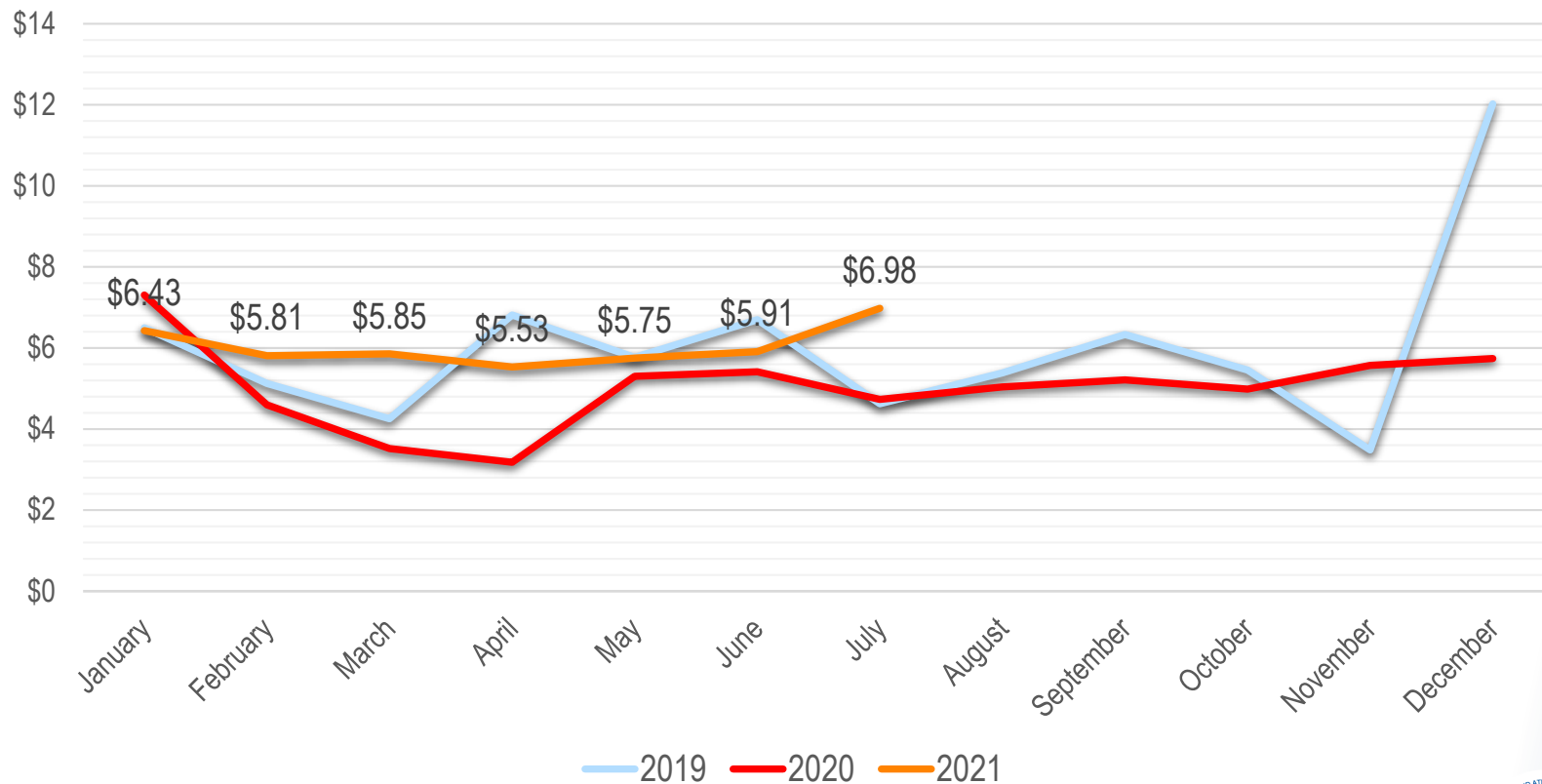


# Atlantic HMS Ex-Vessel Value Compared to 2019



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# Bluefin Tuna Average Ex-Vessel Price

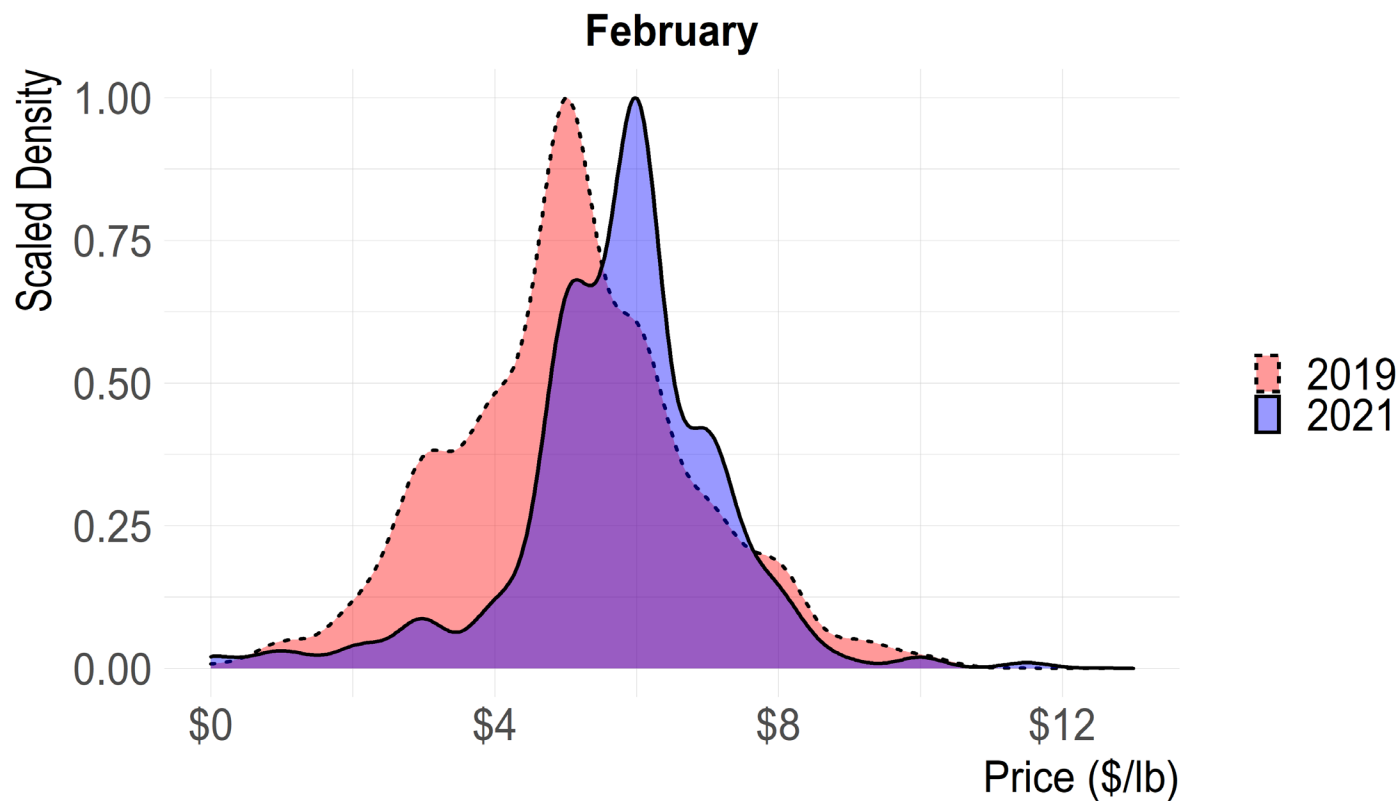


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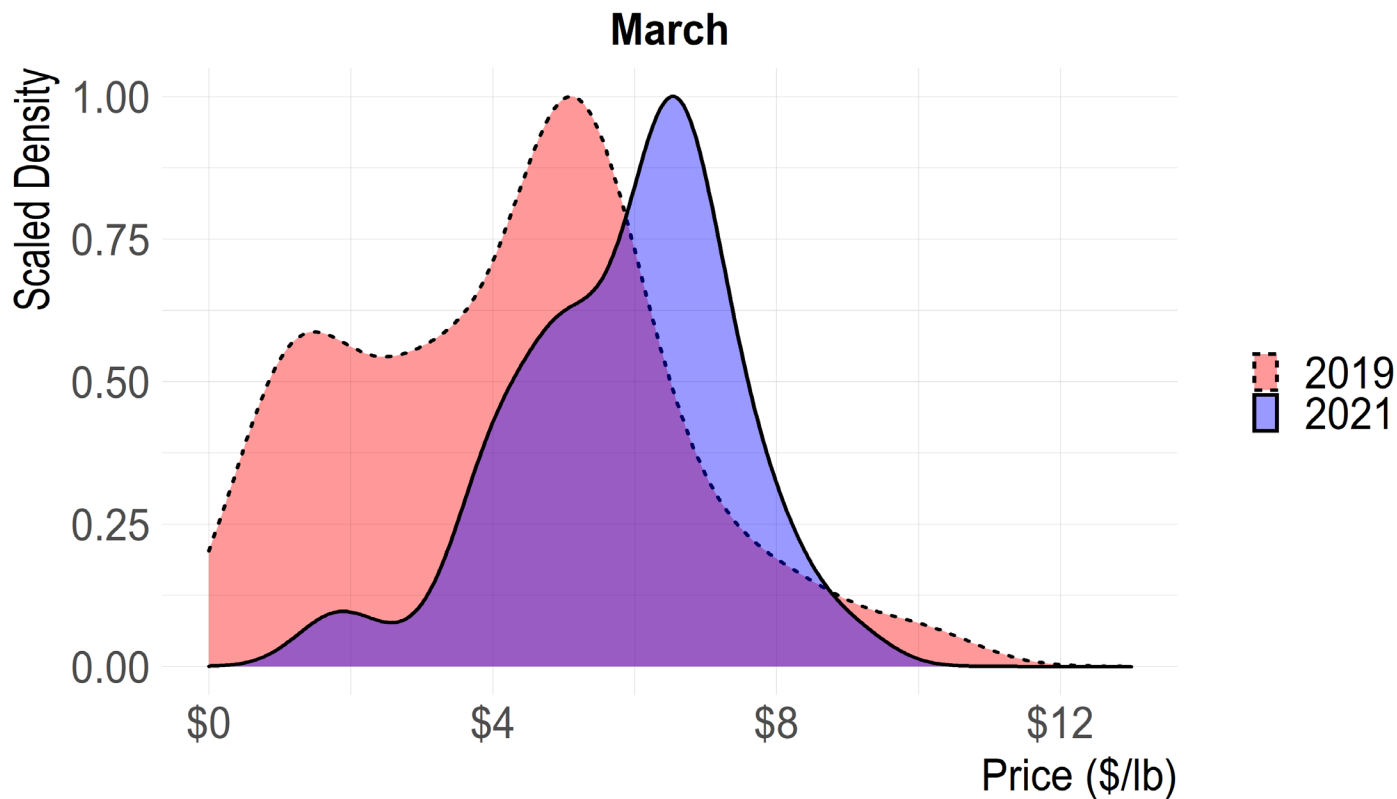
# January Bluefin Tuna Ex-Vessel Price Distribution



# February Bluefin Tuna Ex-Vessel Price Distribution

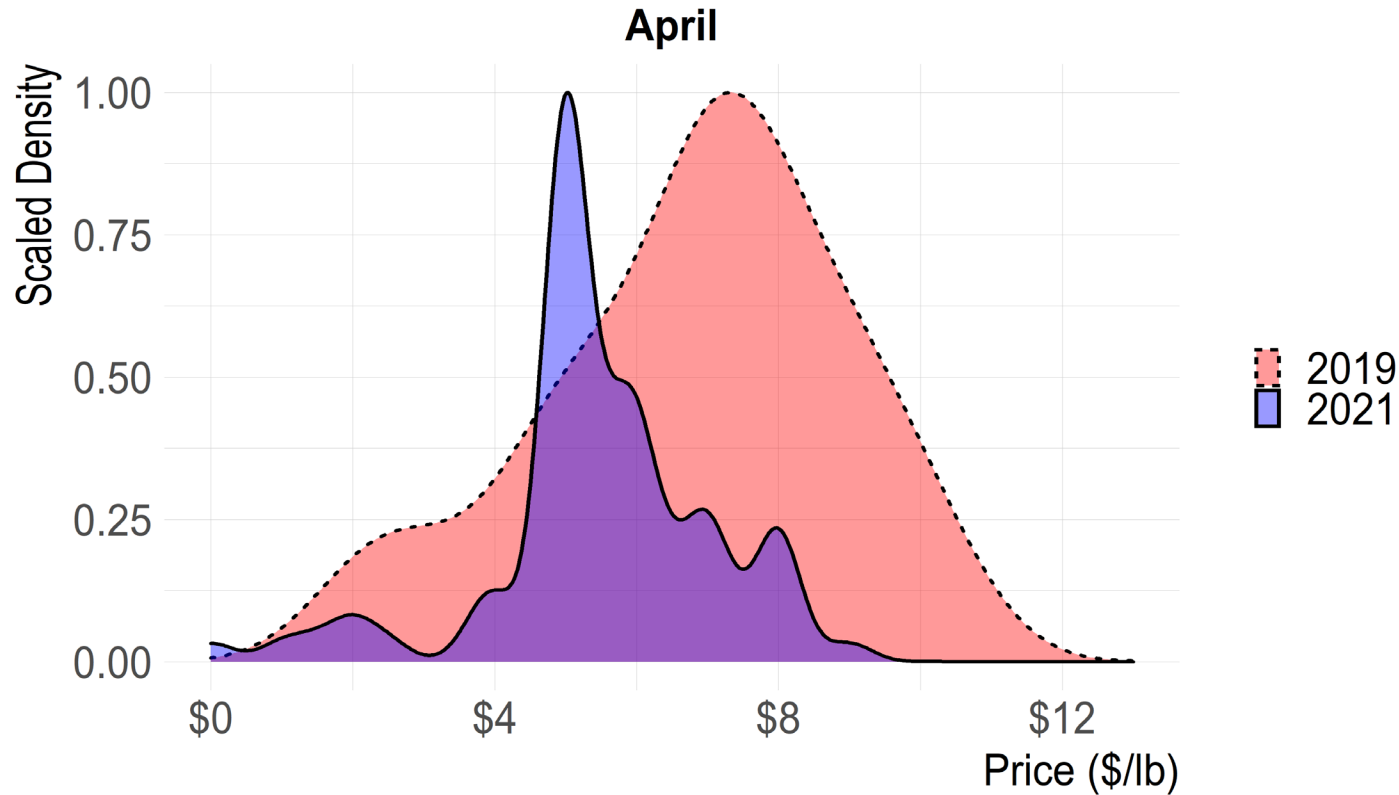


# March Bluefin Tuna Ex-Vessel Price Distribution

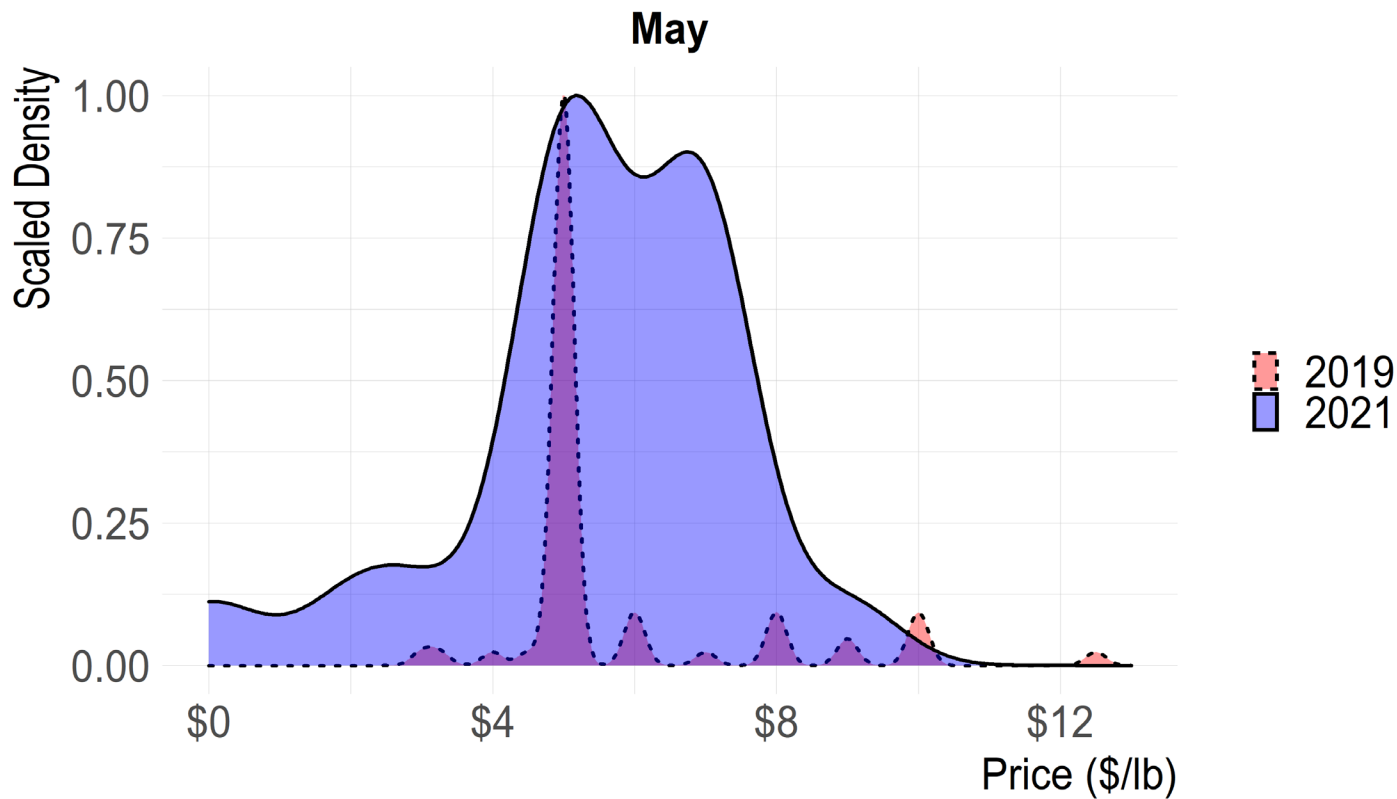


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# April Bluefin Tuna Ex-Vessel Price Distribution

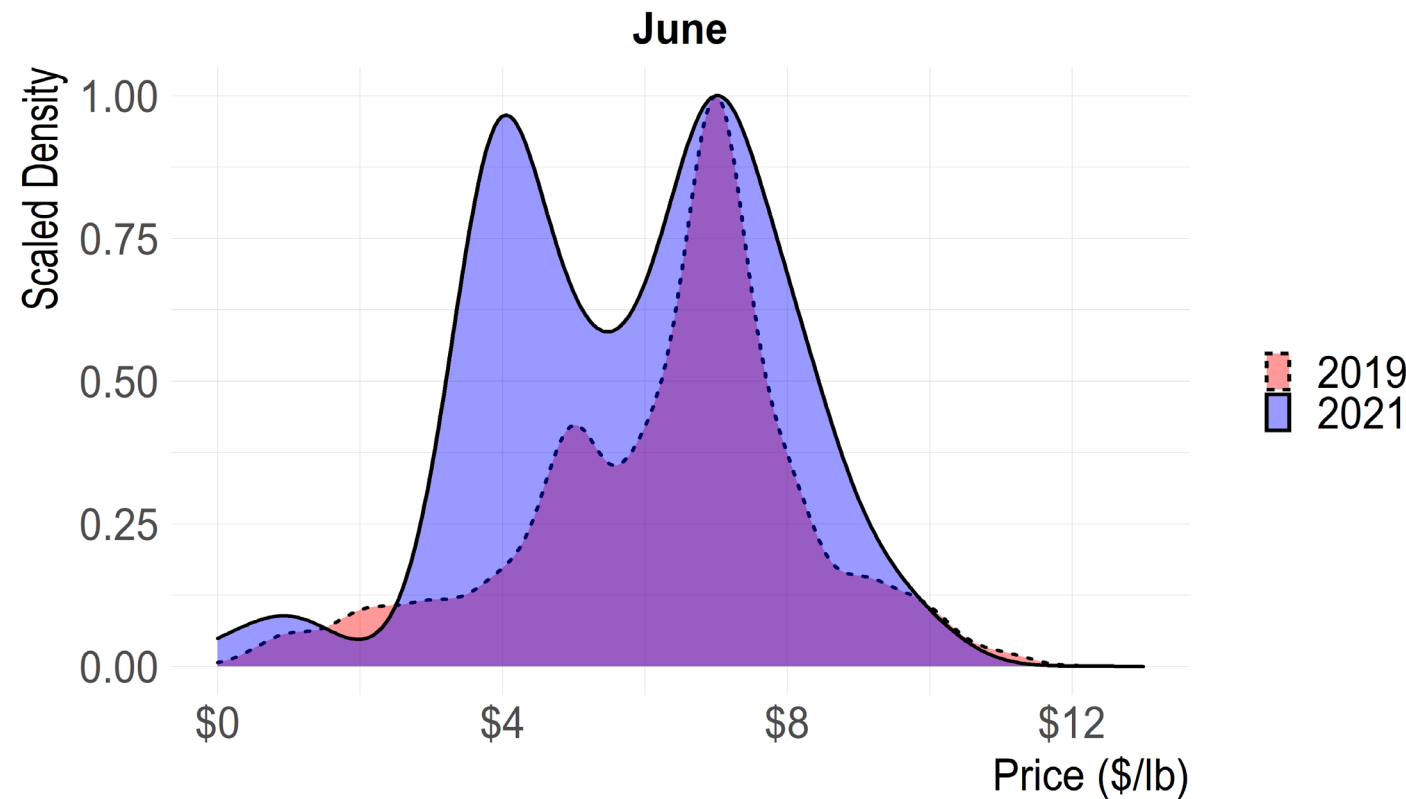


# May Bluefin Tuna Ex-Vessel Price Distribution

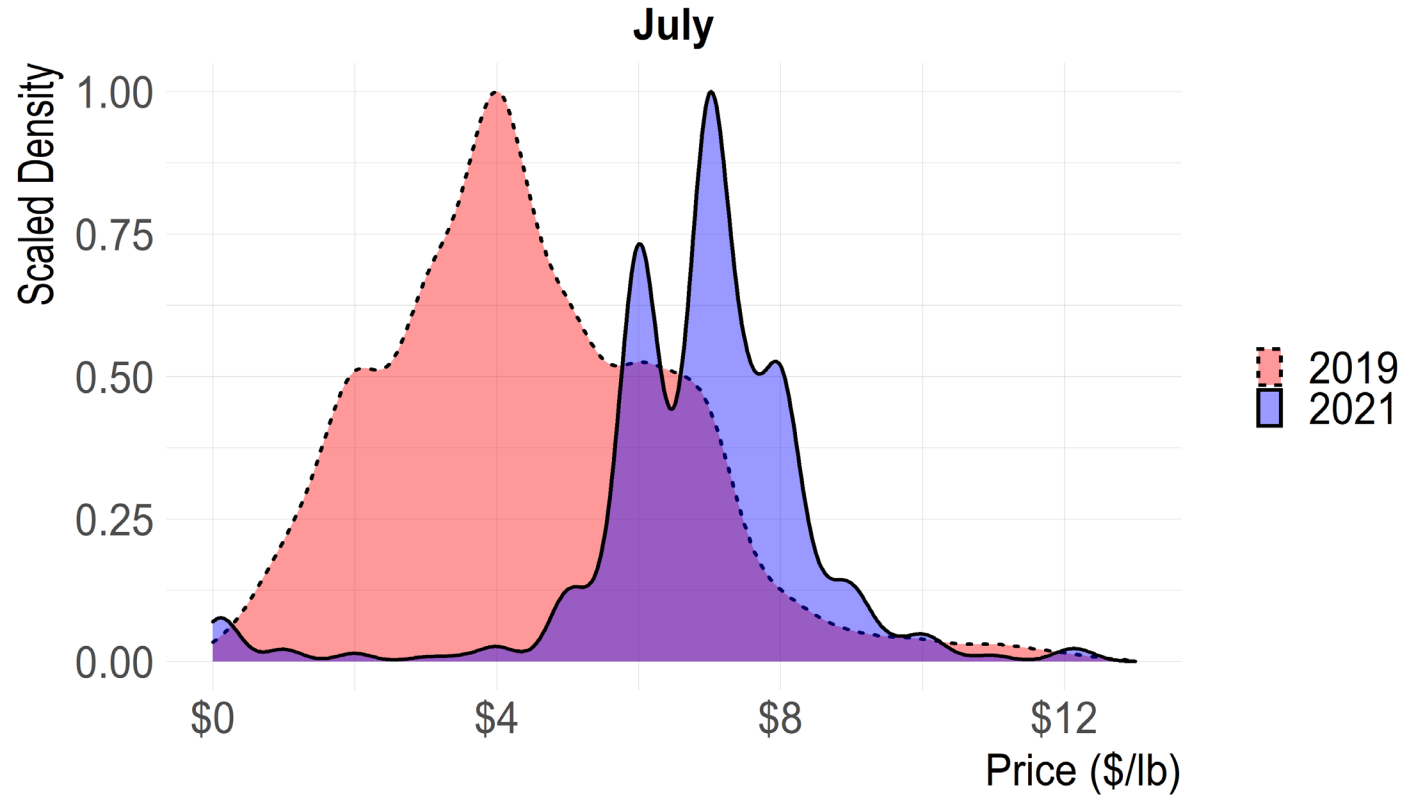




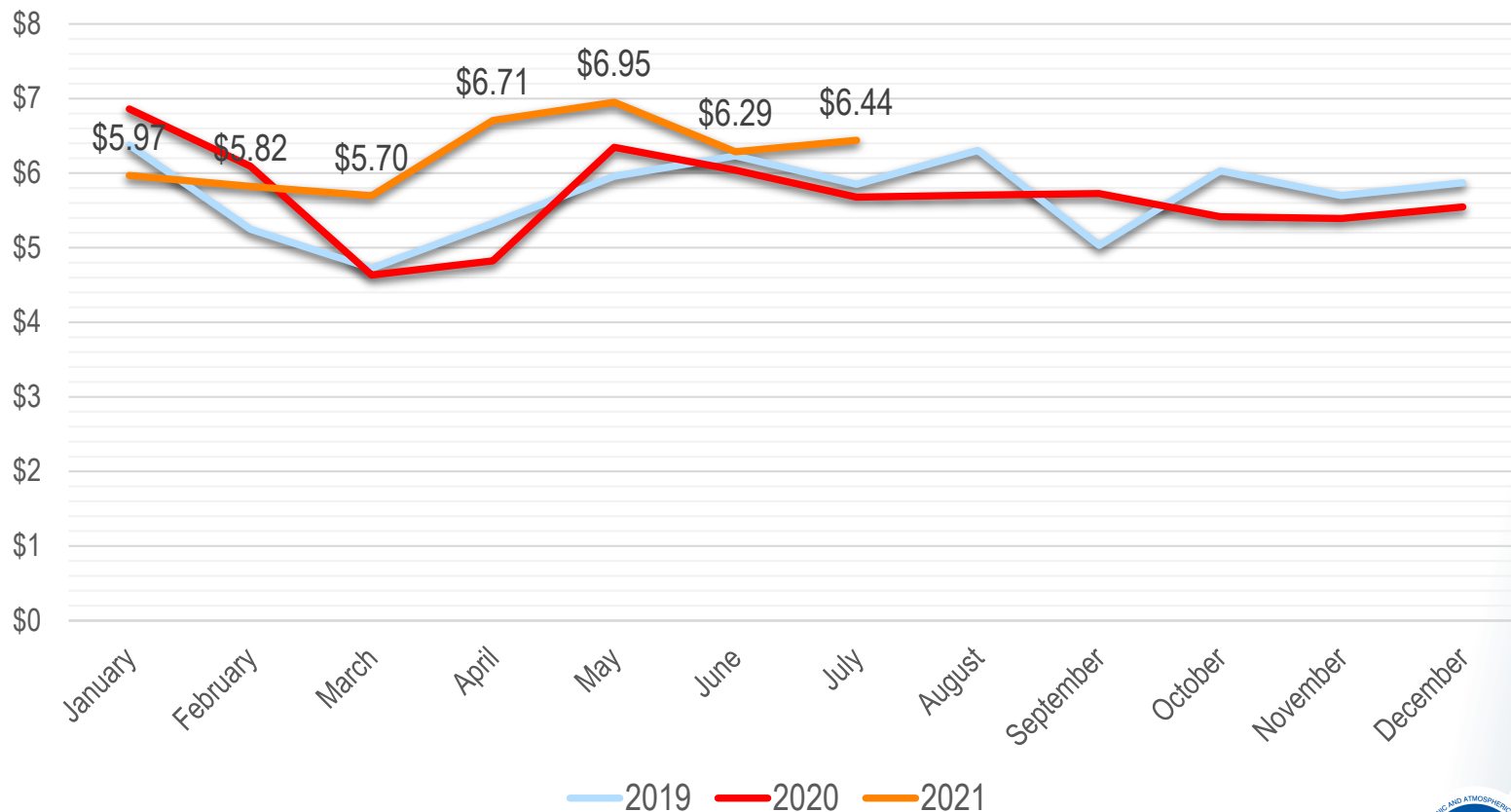
# June Bluefin Tuna Ex-Vessel Price Distribution



# July Bluefin Tuna Ex-Vessel Price Distribution

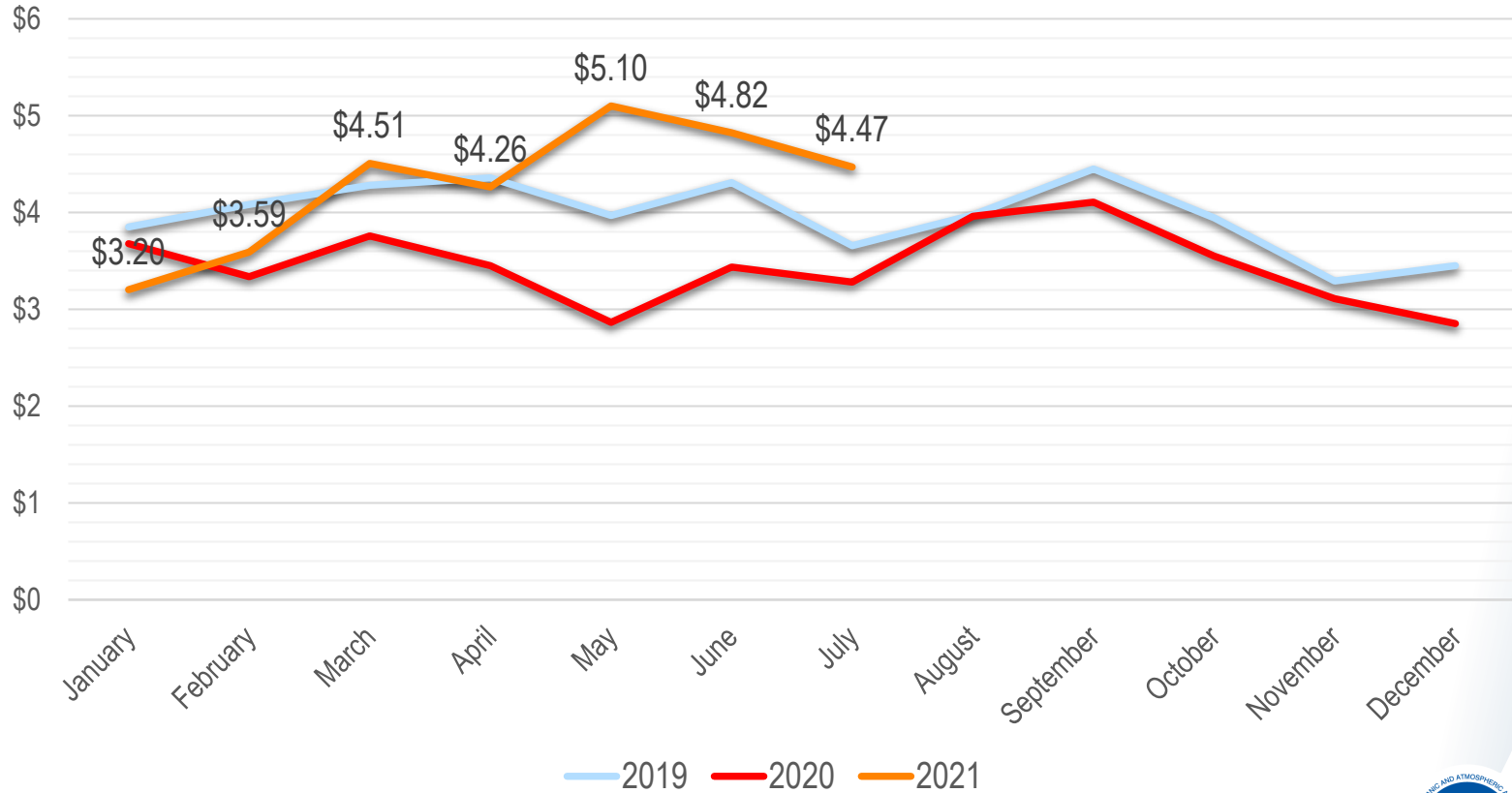


# Bigeye Tuna Average Ex-Vessel Price



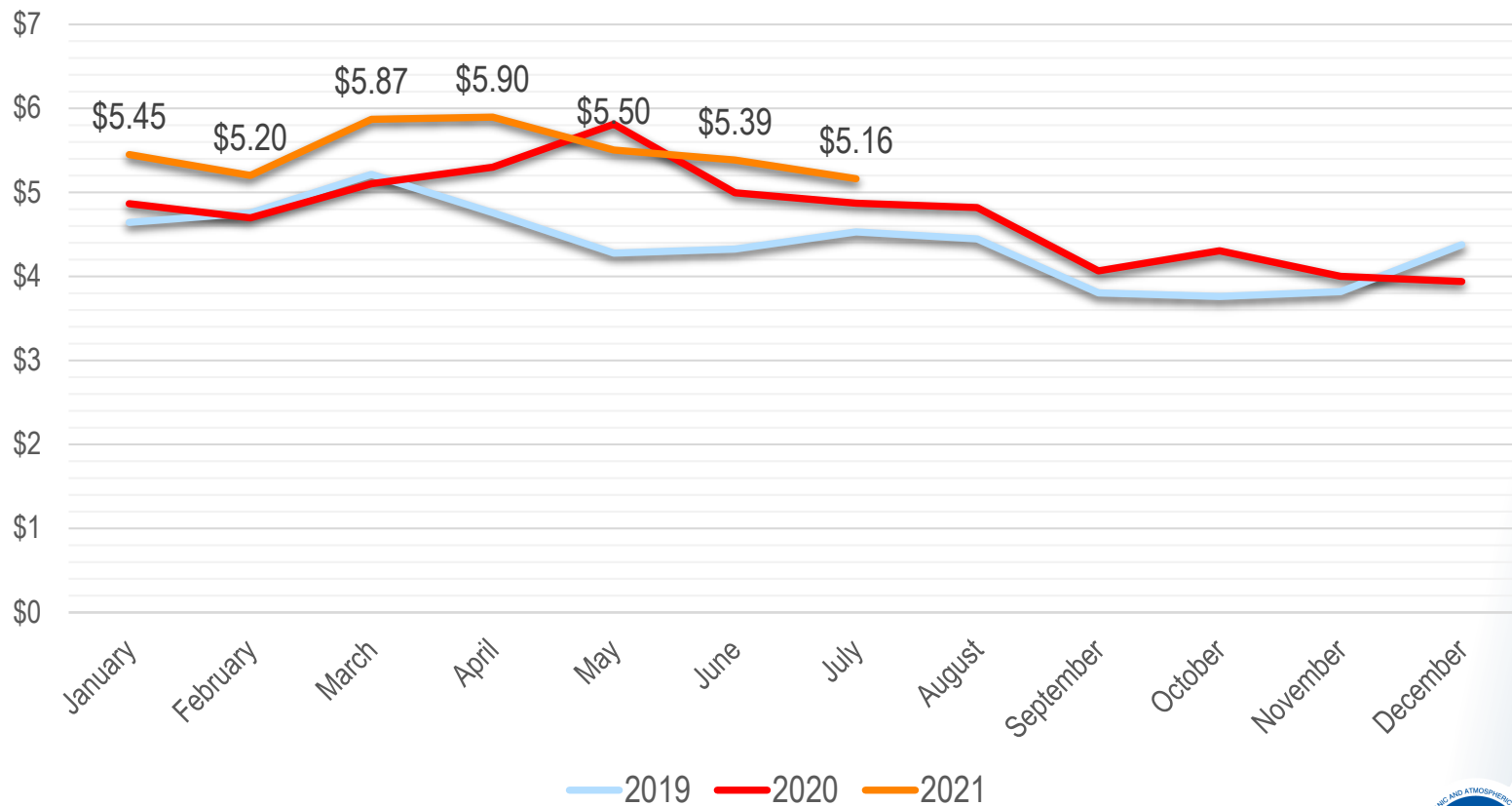
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# Yellowfin Tuna Average Ex-Vessel Price



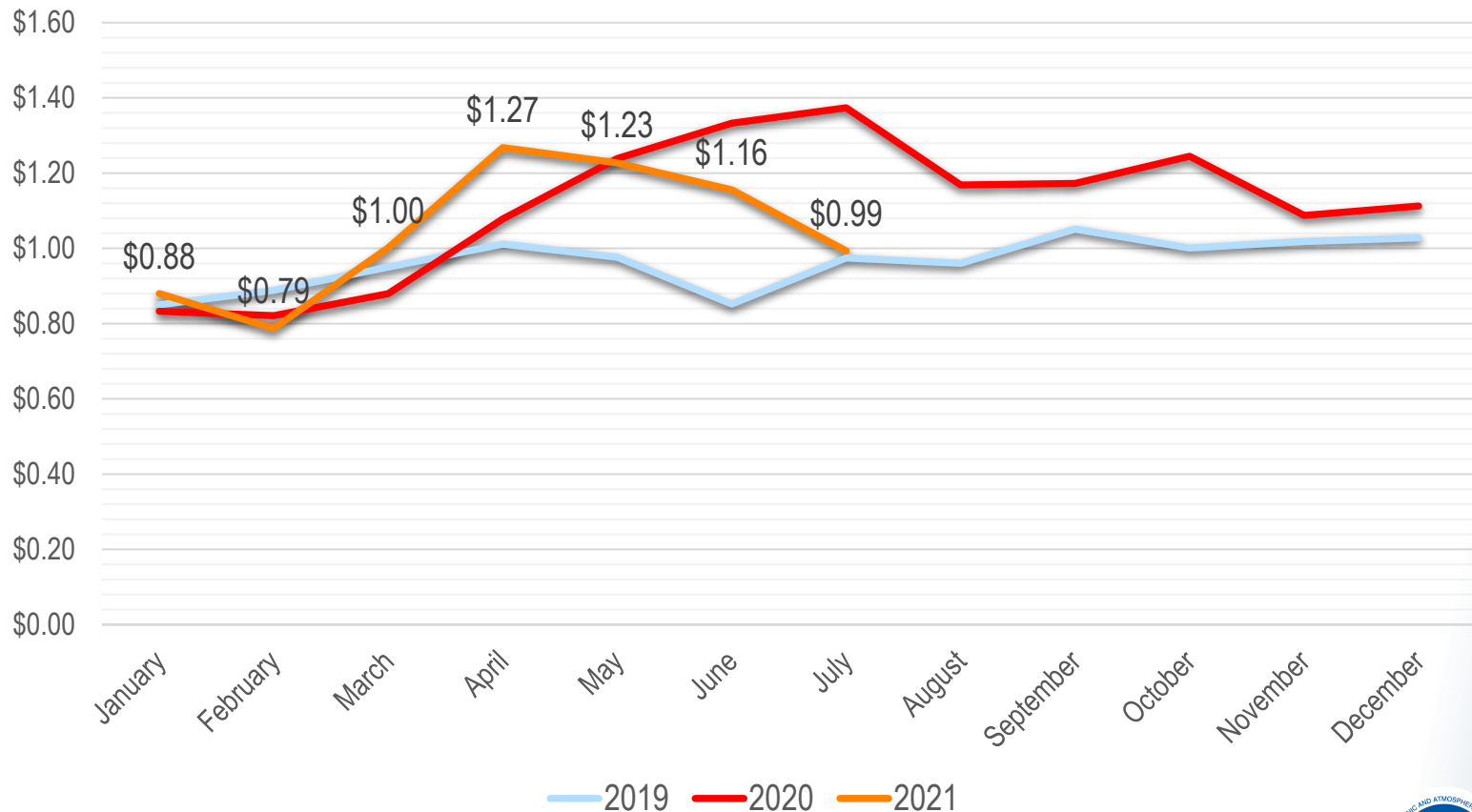
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# Swordfish Average Ex-Vessel Price



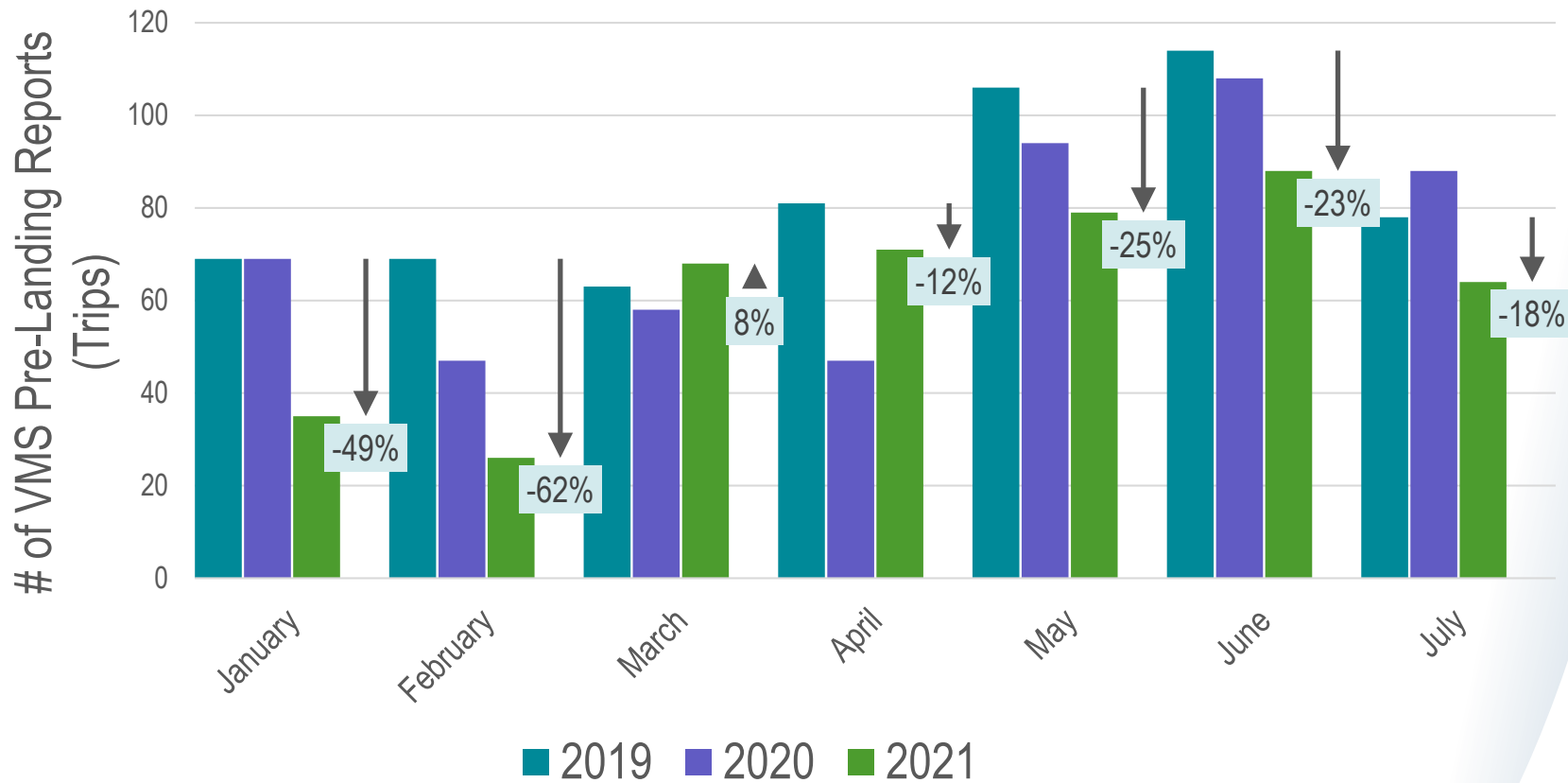
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# Blacktip Shark Average Ex-Vessel Price

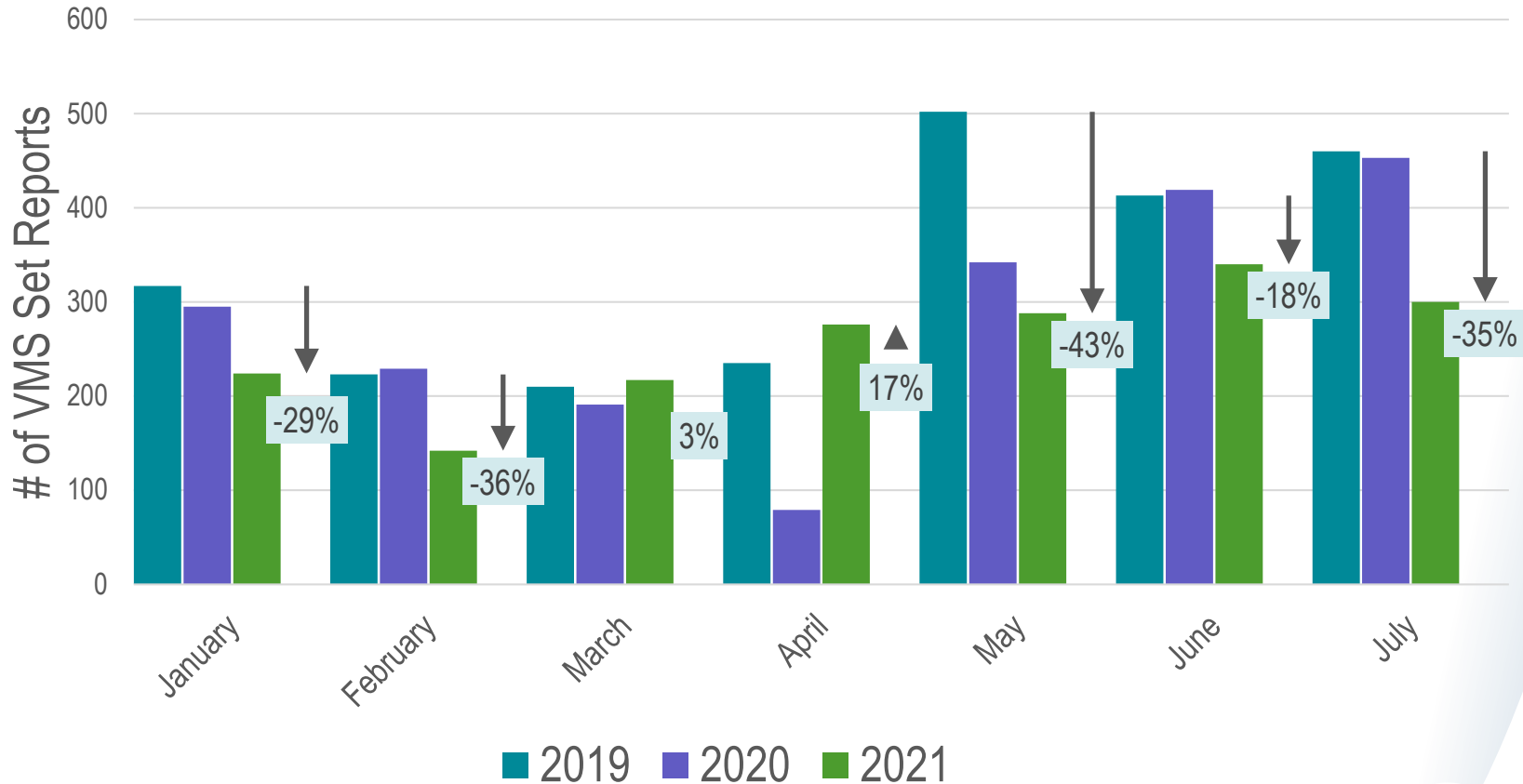


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# HMS Commercial Vessel Trips Compared to 2019



# Pelagic Longline Fleet Effort Compared to 2019





# HMS Trade Data

Overall imports of HMS species products decreased in 2020 compared to 2019

Species	2019 Imports (mt)	2020 Imports (mt)
Bluefin	2,542.8	1,740.5
Bigeye	4,974	1,942
Yellowfin	19,695	14,604
Albacore	1,334	602
Skipjack	11	158
Swordfish	10,456	8,163



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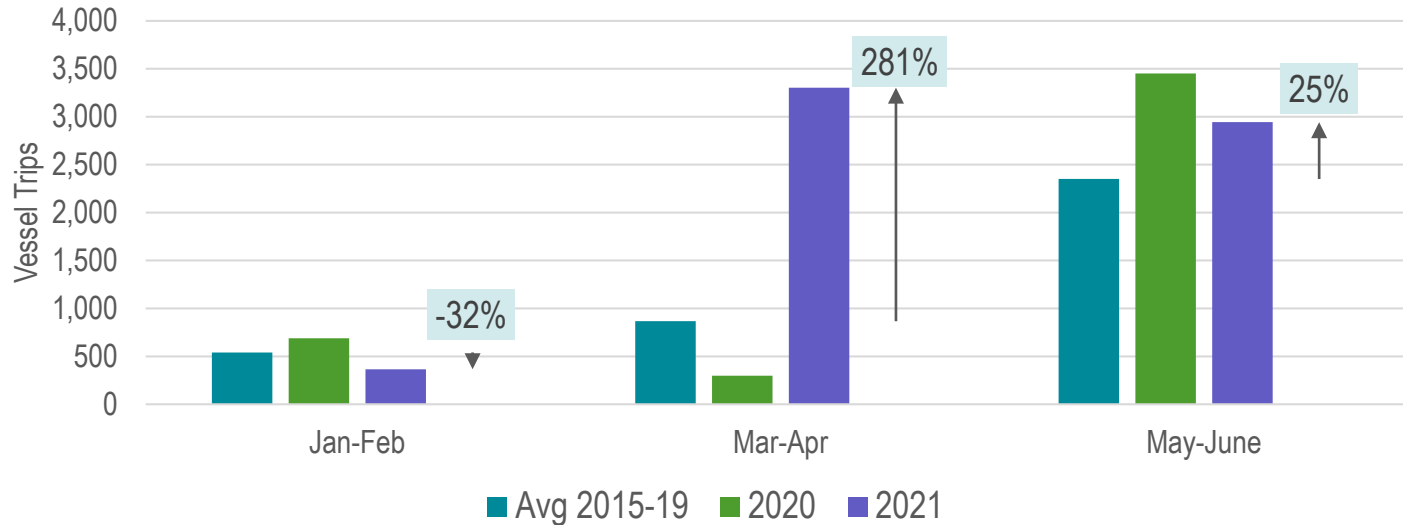
# Recreational Fisheries



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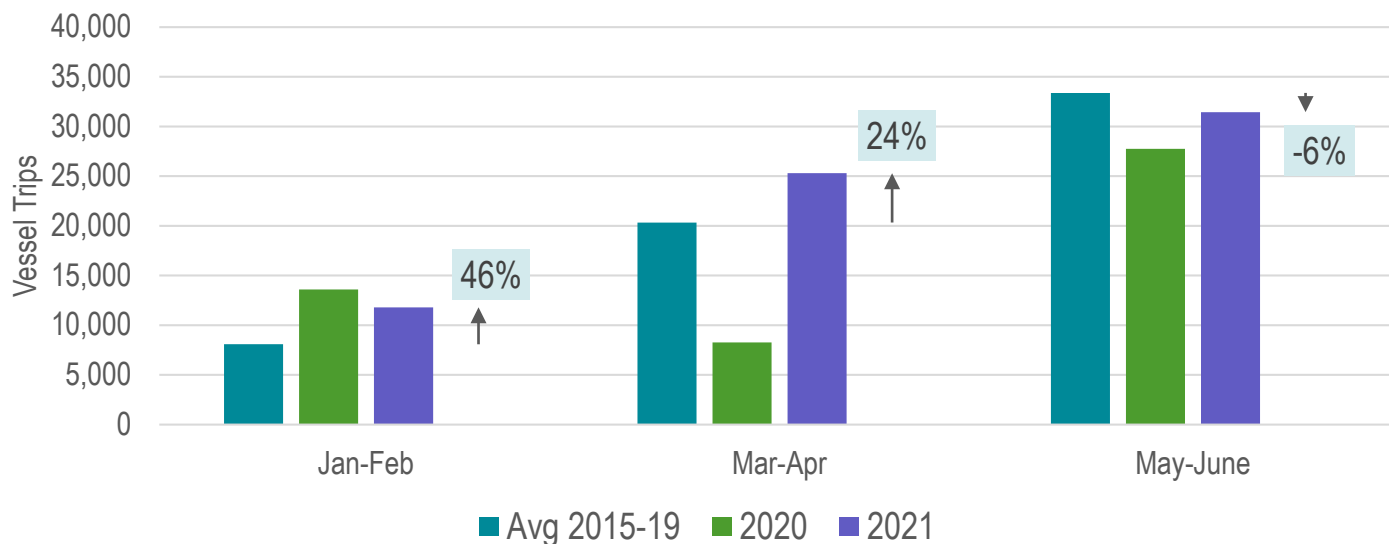
# MRIP South Atlantic HMS For-Hire Effort

2021 saw a large increase in HMS for-hire trip estimate in Wave 2 well outside the range of the 2015-2019 average.



# MRIP South Atlantic HMS Private Boat Effort

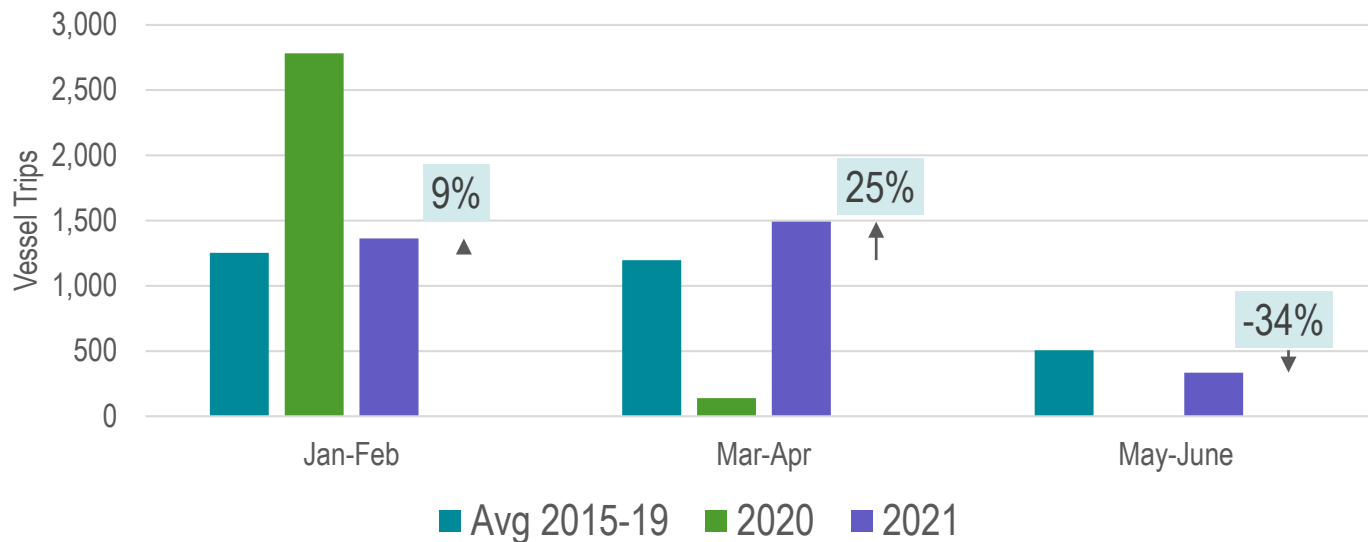
2021 private vessel effort for HMS largely within the range of the 2015-2019 average for all waves.



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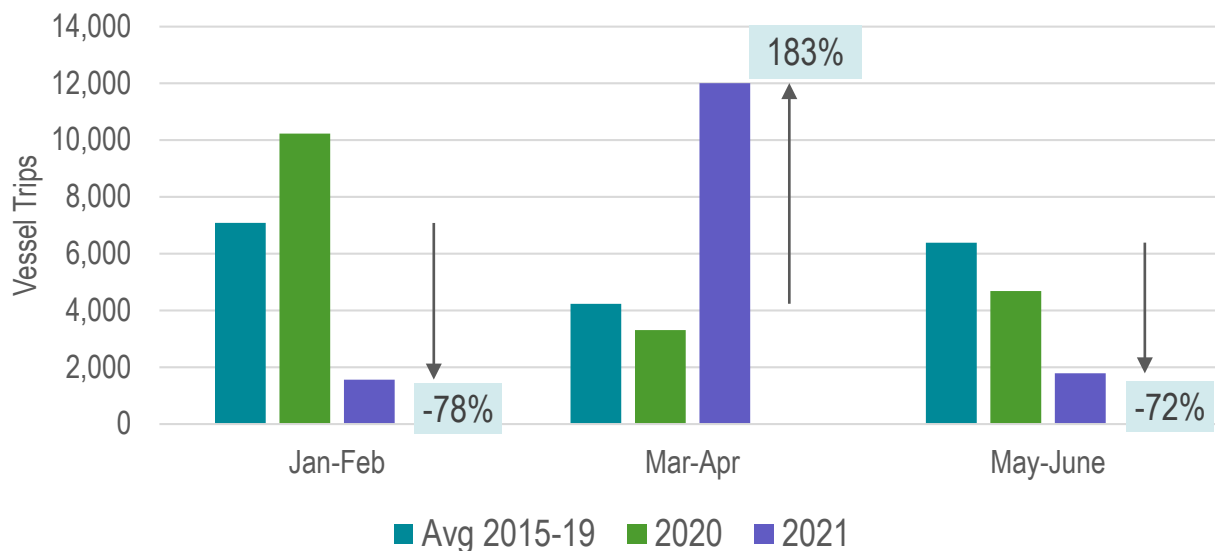
# MRIP Gulf of Mexico HMS For-Hire Effort

Gulf HMS for-hire effort estimates are highly variable, but 2021 estimates are more in line with the 2015-2019 average.



# MRIP Gulf of Mexico HMS Private Boat Effort

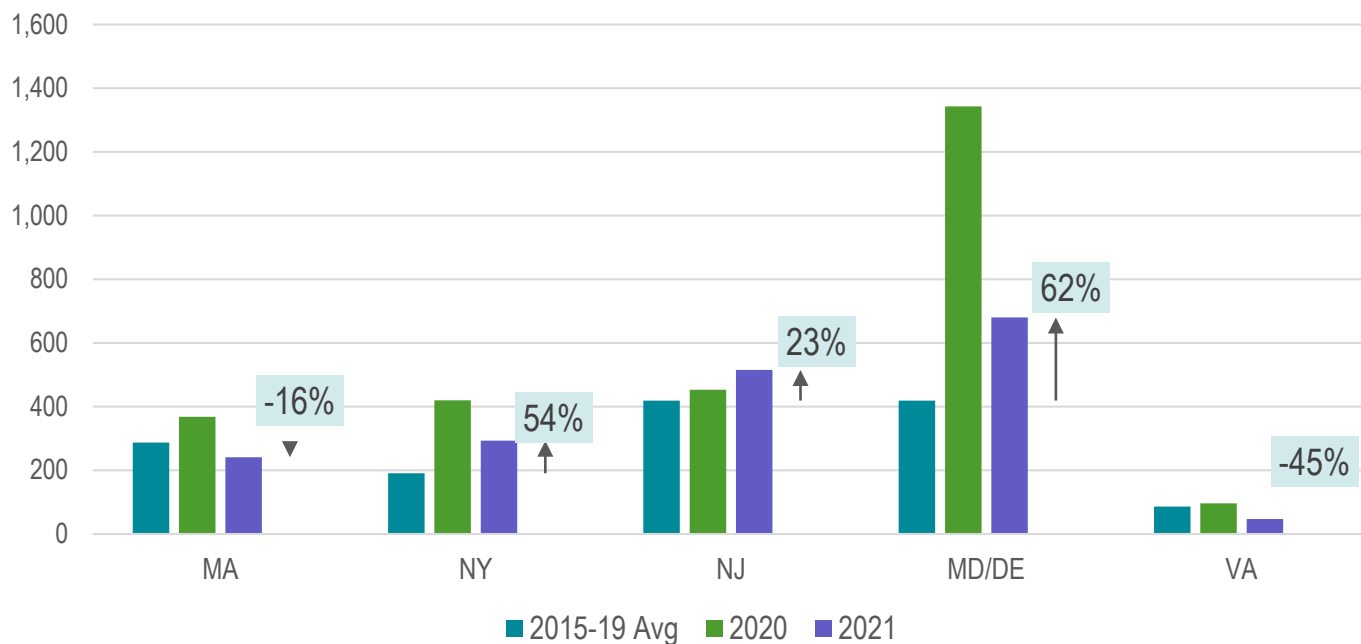
Private boat HMS effort estimates in the Gulf are extremely variable making it difficult to distinguish pandemic impacts versus data variability.



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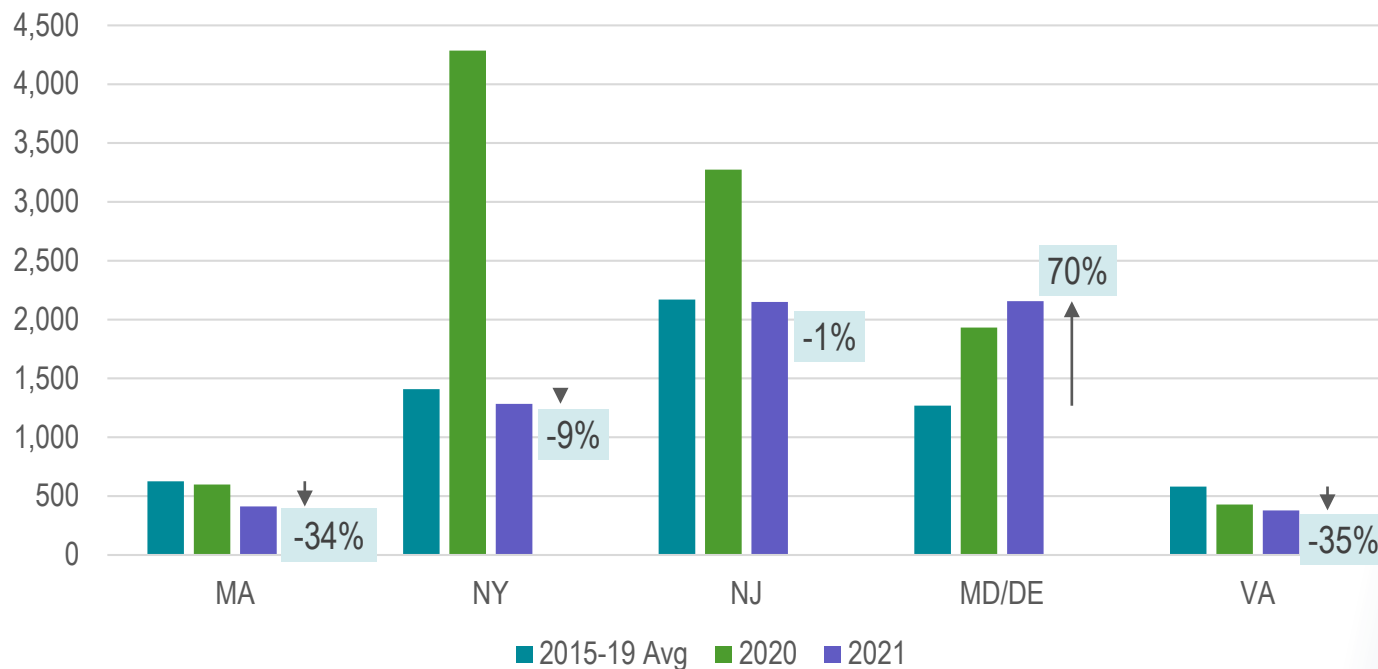
# LPS June Charter Vessel Trips by State

- Large increases over 2019 still seen in NY, NJ, and MD/DE
- Reduced charter effort in MA within range of the previous 5 years, but not VA



# LPS June Private Vessel Trips by State

- Private vessel effort largely returned to normal levels in June 2021
- Still a substantial increase in effort in MD/DE

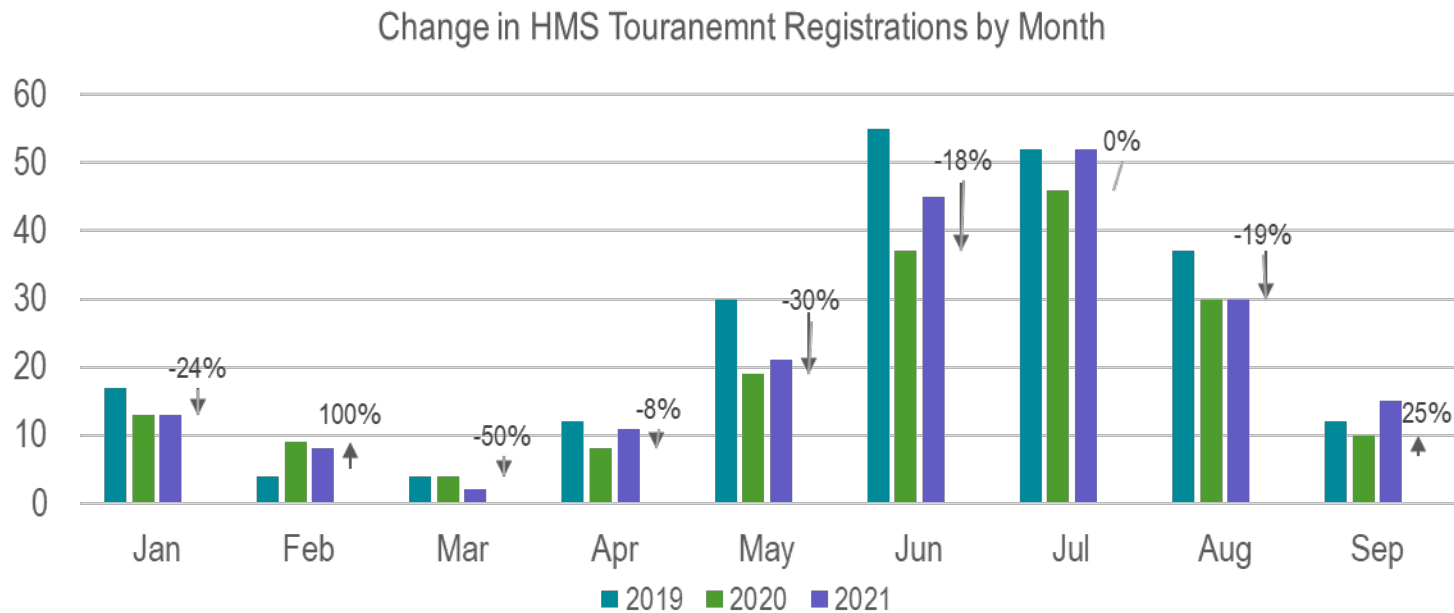


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# HMS Tournament Impacts

Compared to 2019, 47 fewer tournaments were registered in 2020 through the month of September, and 26 fewer in 2021.



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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

George Silva & Clifford Hutt

(301) 427-8503

[george.silva@noaa.gov](mailto:george.silva@noaa.gov)

[cliff.hutt@noaa.gov](mailto:cliff.hutt@noaa.gov)



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