3.3 South Central Alaska Region

3.3.1 Overview

The South Central Alaska region encompasses a wide range of communities from Cook Inlet to Prince William Sound. The region includes the Kenai Peninsula, the Prince William Sound Census Area, the Municipality of Anchorage, and the Matanuska-Susitna Borough as shown in Figure 3.3-1. The communities of the region include Anchorage, the largest community in Alaska with approximately 260,000 residents in 2000, as well as small coastal fishing communities.

Figure 3.3-1 South Central Alaska Study Region

In terms of involvement with groundfish, the region differs sharply from other Alaska regions characterized. During the period 1991-2000, groundfish were processed in Anchorage, Cordova, Homer, Kenai, Nikiski, Ninilchik, Seldovia, Seward, Soldotna, Valdez, and Whittier. The top three ports for the processing of groundfish for the period 1991-1999 were, in alphabetical order, Cordova, Nikiski, and Seward. Together, these communities account for the majority of groundfish processed in the region. These three communities, however, are quite different from each other. Cordova is a port that is not road connected, and is both home to a resident fleet and shore based processing entities. Nikiski, in contrast, is on the road system and mostly processes fish initially landed in Homer

or Kenai that are subsequently trucked to the facility. Seward, also on the road system, is a port of landing with a local processing capability, but fish landed in Seward are also trucked elsewhere for processing. Homer and Seward serve as the primary ports for groundfish that are trucked via the Alaska road system; Anchorage, which itself has virtually no groundfish landings, is a recipient of trucked fish as it is the site of a large secondary processing plant and a number of relatively small custom processors. In terms of the top ports for catcher vessels (as determined by owner residence), Homer and Anchorage each account for more than 20 percent of the total regional groundfish harvest, while Cordova and Seward each account for approximately 10 percent or greater of the total regional groundfish harvest.

In terms of order of magnitude, the South Central region accounts for only 2 percent of the groundfish processed by inshore plants in Alaska over the period 1991-1999. This relative level of effort, however, is not evenly distributed across species. While accounting for less than 1 percent of the pollock, 2 percent of the flatfish, and 5 percent of the Pacific cod processed inshore, the region accounted for 23 percent of the Atka mackerel, rockfish, sablefish, and other unspecified groundfish species. This different focus is an important feature of the South Central regional groundfish fishery.

3.3.2 Population

Table 3.3-1 presents information on population for selected communities in the region. As shown, the region encompasses the municipality of Anchorage. The Kenai Peninsula Borough includes the communities of Homer, Kenai, Nikiski, Ninilchik, Seldovia, Seward, and Soldotna. Cordova, Valdez, and Whittier are not within organized boroughs. The communities listed in the table represent a wide range of diversity in terms of population structure and economic base, although by no means all that exists in Alaska. The other communities range from unincorporated named places to First Class Cities, in locations that range from remote to being road-connected to Anchorage. The three communities of primary interest as groundfish processing centers – Cordova, Nikiski, and Seward – are all about the same size. However, Nikiski and Seward are connected by road to Anchorage (and to each other), and it is this locational/logistical feature that accounts for at least part of their participation in the fishery. While Seward is a relatively self-contained city, Nikiski is an unincorporated place that relies upon the Kenai Peninsula Borough (or private initiative) for most services. Cordova is both homeport to a harvesting fleet as well as the location for processing plants, and so more closely resembles the processing communities of other Alaskan regions in that regard. Anchorage is also an important fishery community, although it does not rank high in terms of either landings or processing. It is the logistical and communication center of the state, and certainly for the South Central region. Many fishing enterprises and organizations have an office there, if not their central office. Government agencies have key offices there, and the North Pacific Fishery Management Council is based in the community.

Table 3.3-1. 1880-2000 Total Population Selected Communities, South Central Region

Community	Incorporation Type	2000	1990	1980	1970	1960	1950	1940	1930	1920	1910	1900	1890	1880
Anchorage	Unified Home Rule Municipality	260,283	226,338	174,431	124,542	82,833	11,254	3,495	2,277	1,856	0	0	0	0
Cordova	Home Rule City	2,454	2,110	1,879	1,164	1,128	1,165	938	980	955	1,152	0	0	0
Homer	1st Class City	3,946	3,660	2,209	1,083	1,247	307	325	0	0	0	0	0	0
Kenai	Home Rule City	6,942	6,327	4,324	3,533	778	321	303	286	332	250	290	264	0
Nikiski	Unincorporated	4,327	2,743	1,109	0	0	0	0	0	0	0	0	0	57
Ninilchik	Unincorporated	772	456	341	134	169	97	132	124	87	0	0	81	53
Seldovia	1st Class City	286	316	479	437	460	437	410	379	258	173	149	99	74
Seward	Home Rule City	2,830	2,699	1,843	1,587	1,891	2,114	949	835	652	534	0	0	0
Soldotna	1st Class City	3,759	3,482	2,320	1,202	32	0	0	0	0	0	0	0	0
Valdez	Home Rule City	4,036	4,068	3,079	1,005	555	554	529	442	466	810	315	0	0
Whittier	2nd Class City	182	243	198	130	809	627	0	0	0	0	0	0	0

Source: Historic data from Alaska Department of Community and Economic Development. 2000 data from U.S. Bureau of the Census, accessed through www.census.gov/prod/cen2000/index.

As shown in Table 3.3-2, the South Central communities listed are largely non-Native in their population. Additionally, the type of very large male-female imbalance often seen in small- to moderate-sized communities with relatively large processing capacity (such as in Akutan, King Cove, Sand Point, and Unalaska in the Aleutian region) is not seen in the South Central communities. This, in part, reflects both a smaller scale of processing operations and a more resident workforce, where processing workers tend to be drawn from the local labor pool rather than brought to the community as seasonal or term hires. On the other hand, the region's communities do vary in their male/female population ratios. The state of Alaska as a whole in 1990 was 53 percent male. Anchorage was only 51 percent male. Nikiski, Cordova, and Seward were 52, 54, and 60 percent male respectively. This does reflect the reduced economic opportunities available in the less urbanized parts of their state.

Table 3.3-2. 2000 Regional Population Composition Selected Communities, South Central Region

Community	Male Population	Female Population	Native Population	Pct Native Population	White Population	Black Population	Asian Population	Native Hawaiian and Other Pacific Islanders	Some other Race	Two or More Races	Hispanic Population
Anchorage	131,668	128,615	18,941	5.8%	188,009	15,199	14,433	2,423	5,703	15,575	14,799
Cordova	1,336	1,118	254	10.4%	1,745	10	247	0	33	165	75
Homer	1,951	1,995	167	4.2%	3,573	13	36	4	29	124	95
Kenai	3,430	3,512	607	8.7%	5,745	34	115	16	78	347	265
Nikiski	2,257	2,070	327	7.6%	3,771	5	31	22	36	135	57
Ninilchik	405	367	108	14.0%	635	0	4	0	1	24	5
Seldovia	145	141	50	17.5%	210	3	2	1	1	19	6
Seward	1,699	1,131	472	16.7%	2,041	69	52	5	25	166	68
Soldotna	1,788	1,971	187	5.0%	3,310	11	65	14	48	124	121
Valdez	2,095	1,941	290	7.2%	3,375	17	88	18	57	191	160
Whittier	96	86	10	5.5%	144	0	13	0	0	15	2

Source: U.S. Bureau of the Census, accessed through www.census.gov/prod/cen2000/index.

Housing and household income data for the South Central region are presented in Table 3.3-3. As shown, there is wide variation in the median household income between communities. This, to a large degree, reflects the fundamentally different nature of the economies in various regional communities and this often has little to do with factors associated with commercial fishing. For example, Valdez, as the terminus of the Trans-Alaska Pipeline system, has an economy heavily influenced by the oil industry and has the highest median family household income in the region. Although at least some groundfish are processed in the community, the community does not show up in the 95 percentile rankings of catcher vessel ownership for the region, and thus groundfish cannot be considered to be a strong part of the local economy. At the other end of the regional household income scale for the communities shown in the table, Ninilchik has little involvement with groundfish processing and like Valdez does not show up in the 95 percentile regional catcher vessel ownership data.

Table 3.3-3a. 1990 Housing and Household Information Selected Communities, South Central Region

Community	Housing Units	Occupied Housing Units	Vacant Housing Units	Total House-holds	Average Persons Per Household	Median Household Income	Family House-holds	Median Family Income
Anchorage	94,153	82,702	11,451	82,702	3	43,946	56,503	50,098
Cordova	883	773	110	773	3	46,304	510	50,984
Homer	1,673	1,411	262	1,411	3	36,652	912	42,824
Kenai	2,681	2,329	352	2,329	3	42,889	1,626	49,552
Nikiski	1,045	888	157	888	3	44,242	718	44,539
Ninilchik	330	185	145	185	2	31,518	119	32,159
Seldovia	221	129	92	129	2	27,500	67	45,313
Seward	1,010	886	124	886	2	37,049	536	47,500
Soldotna	1,460	1,284	176	1,284	3	38,004	903	46,667
Valdez	1,499	1,277	222	1,277	3	68,570	897	69,924
Whittier	265	112	153	112	2	33,636	47	41,875

Source: U.S. Bureau of the Census

Table 3.3-3b. 2000 Housing and Household Information Selected Communities, South Central Region

Community	Housing Units	Occupied Housing Units	Vacant Housing Units	Total House-holds	Average Household Size	Median Household Income	Family House-holds	Median Family Income
Anchorage	100,368	94,822	5,546	94,822	2.67	a	64,131	a
Cordova	1,099	958	141	958	2.48	a	598	a
Homer	1,873	1,599	274	1,599	2.40	a	1,009	a
Kenai	3,003	2,622	381	2,622	2.64	a	1,787	a
Nikiski	1,766	1,514	252	1,514	2.86	a	1,131	a
Ninilchik	762	320	442	320	2.41	a	223	a
Seldovia	232	135	98	134	2.13	a	71	a
Seward	1,058	917	141	917	2.40	a	556	a
Soldotna	1,670	1,465	205	1,465	2.53	a	970	a
Valdez	1,645	1,494	151	1,494	2.66	a	1,043	a
Whittier	213	86	127	86	2.12	a	46	a

a 2000 census data are not yet available for household income – this table will be updated as soon as they are available.

Source: U.S. Bureau of the Census, accessed through www.census.gov/prod/cen2000/index.

3.3.3 Employment and Income

Employment and poverty information from the 1990 census for the South Central region are presented in Table 3.3-4.[6] What is immediately obvious from the table is that among the communities that account for the majority of the groundfish processing in the region, Cordova is much different from Nikiski and Seward. Whereas unemployment and adults not seeking work are relatively low in Cordova (the lowest in the table, and even lower than Anchorage), unemployment and adults not seeking work are both high in Nikiski and Seward (among the highest on the table). Cordova is typically seen as a "fishing community," whereas Nikiski and Seward are not. The Nikiski area is a base for oil and gas support in the Cook Inlet region, but also includes non-industrial areas, and Seward's economy includes relatively well developed tourism and transportation sectors.

[6] Relevant data from the 2000 census are not yet available, so this section still relies on 1990 data – it will be updated as soon as the information becomes available.

Table 3.3-4. 1990 Employment and Poverty Information Selected Communities, South Central Region

Community	Total Persons Employed	Unemployed	Percent Unemployment	Percent Adults Not Working	Not Seeking Employment	Percent Poverty
Anchorage	121,866	8,421	7.0%	26.7%	36,001	7.0%
Cordova	1,195	35	3.1%	23.8%	339	4.7%
Homer	1,722	141	7.9%	35.6%	810	5.0%
Kenai	2,738	376	12.1%	38.2%	1,314	7.3%
Nikiski	1,059	180	14.5%	42.2%	594	7.0%
Ninilchik	146	47	24.4%	59.7%	169	9.6%
Seldovia	97	13	11.8%	50.3%	85	16.2%
Seward	1,167	115	9.2%	44.9%	837	10.7%
Soldotna	1,596	153	8.7%	33.0%	633	5.7%
Valdez	2,243	212	8.8%	26.0%	578	5.1%
Whittier	126	11	8.0%	37.0%	63	13.0%

Source: U.S. Bureau of the Census

In terms of contrasting with other regions, it should be noted that the economies of South Central groundfish processing communities tend to be more diversified than the Aleutian (or Kodiak) processing communities. In part, this is a function of road-connectedness and the developmental possibilities associated having easy access to a large population base, and in part due to other resources available for development, such as oil and gas. Groundfish then is of lesser importance to the region both in absolute and relative terms than for either the Aleutian or Kodiak regions as a whole, and for the larger processing communities in each of the regions.

Table 3.3-5 provides a breakout of total employment for the region for selected years for the period 1975 through 1999. These figures provide a broad-brush overview of the level of diversification of the economy on a regional basis. Local economies, both in their scale and composition, vary dramatically within the region. As a generality, fishing is less important to this region than for the other Alaska regions, and this holds true in particular for groundfish. This is due simply to the fact that the region is by far the largest in both population and diversified regional economic base, and the smallest in terms of groundfishery participation among the regions.

Table 3.3-5. Total Employment for South Central Region, 1975–1999

Sector	No. of Persons Employed by Year					
	1975	1980	1985	1990	1995	1999
Agricultural Services, Forestry, Fishing, and Other	1,445a	3,479	6,037	5,940	5,236	6,510
Construction	12,041	8,307	15,858	10,295	12,251	13,882
Federal, Civilian	11,113	9,909	10,097	11,003	10,993	10,350
Finance, Insurance, and Real Estate	12,497	16,593	18,078	14,567	14,789	16,604
Manufacturing	3,267	4,448	5,273	6,118	6,210	5,697
Military	14,439	13,286	13,467	14,382	12,749	11,547
Mining	2,240a	3,859a	6,004	7,241	5,894a	5,398
Retail Trade	14,520	17,690	28,516	30,205	36,681	39,518
Service	22,878	28,473	43,548	51,785	60,670	69,445
State and Local	13,723	15,976	21,699	22,564	24,805	25,342
Transportation and Public Utilities	9,347	10,582	12,786	15,817	17,398	19,798
Wholesale Trade	4,599a	4,702a	7,490	6,862	7,791a	8,203

Note: Where “a” appears in the table, the data is suppressed due to confidentiality reasons, or because there were fewer than ten jobs in that sector during the year indicated. Where an “a” follows a numerical value, one or more of the underlying statistical areas faced disclosure or other limitations. Although the data do not appear in the table, the totals shown in the summary table reflect all available information, which might include estimates of employment and income for unusually small sectors.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System (REIS), 1969-1999. Personal income and employment estimates for all counties and metropolitan areas in the United States.

Tables 3.3-6 and 3.3-7 present time series data on earnings and income for the region for the period 1975-1999. The use of this information to place the groundfish fishery in a geographically based context is somewhat more problematic than it is for other Alaska regions. Because Anchorage is included in the region, and in a sense comprises nearly half of the state’s earnings and income base (as a function of population alone), the contributions of fisheries (let alone the groundfish fisheries) tend to be lost in the ‘noise’ of the regional economy. Many other economic sectors are more important regionally. This, however, does not mean that groundfish are not important to specific communities and, of course, individual operations. In the South Central region, the importance of the groundfish fishery is ‘more localized’ within the region than is the case for the other regions, in the sense that what may be of some local importance is not apparent with respect to regional importance.

Table 3.3-6. Personal Income and Earnings for South Central Region, 1975–1999

Sector	Earnings by Year ($Millions)					
	1975	1980	1985	1990	1995	1999
Agricultural Services, Forestry, Fishing, and Other	10.0a	38.5	86.7	146.7	84.8	88.4
Construction	438.7	383.1	763.8	470.4	607.0	676.5
Federal, Civilian	211.4	292.4	387.0	513.6	646.9	715.3
Finance, Insurance, and Real Estate	75.3	139.7	282.4	222.9	329.3	405.6
Manufacturing	52.1	106.3	142.5	177.8	217.1	197.5
Military	167.7	229.7	357.3	439.4	454.4	484.6
Mining	65.1a	159.9a	340.6a	531.0	463.1a	441.9
Retail Trade	176.5	273.6	580.6	588.6	710.5	831.1
Service	336.0	525.4	1,013.8	1,258.8	1,565.7	1,965.0
State and Local	240.8	467.7	881.1	931.6	1,168.5	1,151.7
Transportation and Public Utilities	219.7	345.1	514.1	620.8	794.8	918.1
Wholesale Trade	92.7a	134.7a	256.6	237.4	271.8a	304.5

Note: Where "a" appears in the table, the data is suppressed due to confidentiality reasons, or because there were fewer than ten jobs in that sector during the year indicated. Where an "a" follows a numerical value, one or more of the underlying statistical areas faced disclosure or other limitations. Although the data do not appear in the table, the totals shown in the summary table reflect all available information, which might include estimates of employment and income for unusually small sectors.

Source: REIS, 1969-1999. Personal income and employment estimates for all counties and metropolitan areas in the United States.

Table 3.3-7. Personal Income, Population, Per Capita Income, and Total Employment for South Central Region, 1975–1999

Indicator	Indicator Data by Year					
	1975	1980	1985	1990	1995	1999
Personal Income ($Millions)	2,157.7	3,555.0	6,814.9	7,748.5	9,701.8	11,332.7
Population (No. of Persons)	200,595	227,962	311,610	318,861	357,565	374,975
Per Capita Personal Income ($)	$10,756	$15,595	$21,870	$24,301	$27,133	$30,222
Total Full- and Part-Time Employment (No. of Persons)	123,047	137,944	189,391	197,286	216,092	232,770

Personal income includes nonfarm and farm income (adjusted for social insurance and residence) plus dividends, interest, rent, and transfer payments.

Source: REIS, 1969-1999. Personal income and employment estimates for all counties and metropolitan areas in the United States.

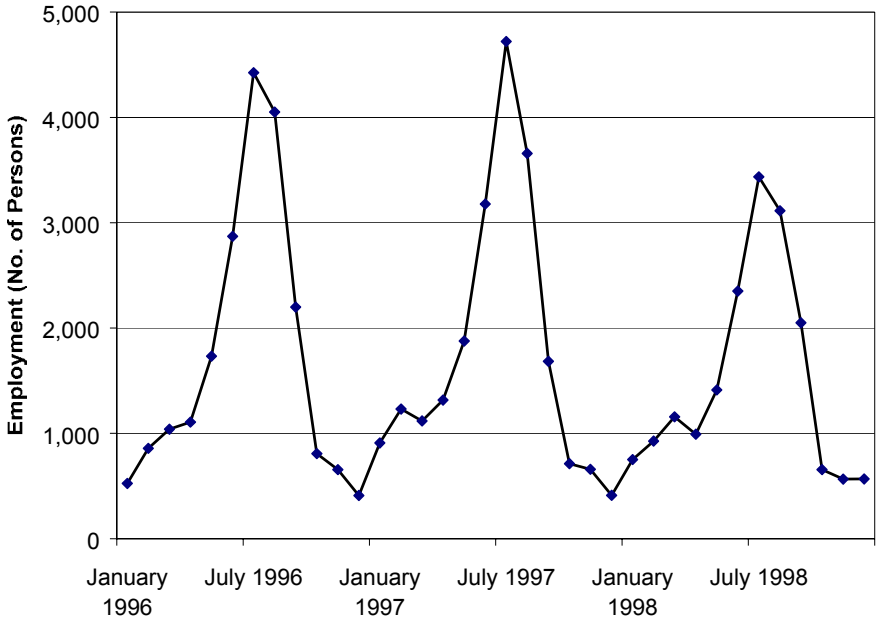
Table 3.3-8 presents information on employment and earnings in food and kindred products manufacturing specifically. This information is likely more accurate than the larger manufacturing category for discerning fisheries-related employment, but this is still less than straightforward for the South Central region because of the range of employment opportunities in this subsector in the greater Anchorage area. Figure 3.3-2 shows the seasonality of the employment in this subsector occurs in a pattern typical of the other Alaska regions.

Table 3.3-8. Employment and Earnings in the South Central Region Food and Kindred Products Manufacturing Sector, 1996–1998

Indicator	Year		
	1996	1997	1998
Annual Average Monthly Employment (No. of Persons)	1,724	1,789	1,498
Total Annual Earnings ($Millions)	36.7	34.9	31.2

Source: DOLWD, Employment and Earnings Summary Report for Alaska and all boroughs and census areas, 1996, 1997, and 1998 reports.

Figure 3.3-2. Monthly Employment in the South Central Region Food and Kindred Products Manufacturing Sector, 1996-1998



Source: DOLWD, Employment and Earnings Summary Report for Alaska and all boroughs and census areas, 1996, 1997, and 1998 reports

3.3.4 Infrastructure

Table 3.3-9 provides an overview of infrastructure by provider by community.

Table 3.3-9. Community Infrastructure and Service Providers Selected Communities, South Central Region

Community	Water Operator	Sewer operator	Landfill operator	Electric utility	Clinic hospital	Police facilities	Fire rescue facilities
Anchorage	Municipality; various Private	Municipality of Anchorage	Municipality	Chugach Electric Association; Anchorage Municipal Light & Power	Multiple facilities (9 listed in database)	Anchorage Police Dept.; State Troopers Post (269-5722); Troopers/Girdwood (783-2704); FBI; U.S. Marshal	Anchorage Fire Dept.; State Troopers/Mountain Rescue; Alaska Search & Rescue Dogs (ASARD); Alaska Snowmachine Search & Rescue Recovery Team (ASSERT)
Cordova	City	City	City	Cordova Electric Cooperative, Inc	Cordova Community Hospital (907-424-8000); private practitioners	City Police Dept.; State Troopers Post (424-3184); State Fish & Wildlife Protection	City Fire Dept. & Volunteer Fire/EMS/Search & Rescue
Homer	City	City	Borough	Homer Electric Association	South Peninsula Hospital	City Police Dept., State Troopers Post (235-8239)	City Volunteer Fire Dept./EMS; City Search & Rescue
Kenai	City; Individuals	City	Borough	Homer Electric Association	n/a	City Police Dept.; State Troopers Post (283-8590)	City Fire Dept./EMS; Civil Air Patrol; Borough Central Emergency Services (CES) Fire/Rescue/EMT
Nikiski	Individuals; McGahan Utilities	Individuals	Borough	Homer Electric Association	n/a	None	Nikiski Fire Dept./EMS/Rescue; Borough Central Emergency Services (CES) Fire/Rescue/EMT
Ninilchik	Individuals; Village Council	Individuals	Borough	Homer Electric Association	Ninilchik Health Clinic	None; State Troopers Post (567-3388)	Ninilchik Volunteer Fire Dept.; Borough Central Emergency Services (CES) Fire/Rescue/EMT
Seldovia	City	City	SOS	Homer Electric Association	Seldovia Health Clinic	City Police Dept.	City Volunteer Fire/Rescue/Ambulance
Seward	City	City	Borough	Seward Electric System	Providence Seward Medical Center	City Police Dept.; City Jail; State Troopers Post (224-3347)	City Volunteer Fire Dept./EMS; City Ambulance
Soldotna	City	City	Borough	Homer Electric Association	Central Peninsula General Hospital; Private	City Police Dept.; State Troopers Post (262-4453)	Borough Central Emergency Services (CES) Fire/Rescue/EMT
Valdez	City	City	City	Copper Valley Electric Assoc	Valdez Community Hospital	City Police Dept. & Jail; State Troopers Post (835-4307)	City Fire Dept./EMS; Civil Air Patrol
Whittier	City	City	Not available	Chugach Electric Association	City of Whittier Medical Clinic	City Public Safety Dept.	City Volunteer Fire Dept.; City Fire Hall; City Ambulance

Source: DCED Alaska Community Database Online. www.dced.state.ak.us\MRA\CF_COMDB.htm

3.3.5 Tax and Revenue

Community tax sources are summarized in Table 3.3-10. Of particular note is the fact that none of the communities have a local or borough fish tax. This is in sharp contrast to the Aleutian region, where all communities where groundfish has been processed in recent years have local and/or borough fish taxes and where a substantial proportion of local revenues are derived from this source.

Table 3.3-10. Community Taxes Selected Communities, South Central Region

Community	Property Tax	Sales Tax	Special Taxes
Anchorage	18.79 mils	None	8% Accommodations Tax; Tobacco
Cordova	13.5 mils	6%	6% Accommodations; 6% Car Rental Tax
Homer	5.5 mils (City); 10.08 mils (Borough)	3.5% (City); 2% (Borough)	None
Kenai	3.5 mils (City); 8.48 (Borough)	3% (City); 2% (Borough)	None
Nikiski	12.28 mils (Borough)	2% (Borough)	None
Ninilchik	8.3 mils (Borough)	2% (Borough)	None
Seldovia	7.25 mils (City); 8.08 mils (Borough)	3% (City); 2% (Borough)	None
Seward	3.12 mils (City); 8.08 mils (Borough)	3% (City); 2% (Borough)	4% Accommodations Tax
Soldotna	1.65 mils (City); 11.23 mils (Borough)	3% (City); 2% (Borough)	None
Valdez	19.9151 mils	None	6% Accommodations Tax
Whittier	5.0 mils	3% April - Sept.	None

Source: DCED Alaska Community Database Online. www.dced.state.ak.us\MRA\CF_COMDB.htm

Table 3.3-11 provides a breakout of revenues by selected community for the region. In addition to absolute values, this table provides a sense of scale of the differences between communities in the region.

Table 3.3-11. Community Revenues (1998) Selected Communities, South Central Region

Community	Local Tax Revenue	Subtotal Local Revenue	Subtotal Outside Revenue	Total Operating Revenue	Revenue Per Capita	Capital Project Revenue
Anchorage	273,731,936	602,089,985	312,653,134	914,743,119	3,535	12,583,952
Cordova	3,660,185	6,794,112	4,332,990	11,127,102	4,328	576,658
Homer	3,826,186	10,035,702	412,066	10,447,768	2,515	74,333
Kenai	4,733,314	9,598,667	1,168,614	10,767,281	1,526	11,370,729
Nikiski	n/a	n/a	n/a	n/a	n/a	n/a
Ninilchik	n/a	n/a	n/a	n/a	n/a	n/a
Seldovia	217,969	596,314	48,844	645,158	2,296	445,847
Seward	3,293,763	16,055,036	733,177	16,788,213	5,522	6,645,104
Soldotna	4,694,667	6,683,897	396,759	7,080,656	1,713	419,546
Valdez	18,513,642	25,308,232	7,982,858	33,291,090	8,012	387,039
Whittier	300,927	1,530,717	174,496	1,705,213	5,573	690,169

Source: DCED Alaska Community Database Online. www.dced.state.ak.us\MRA\CF_COMDB.htm

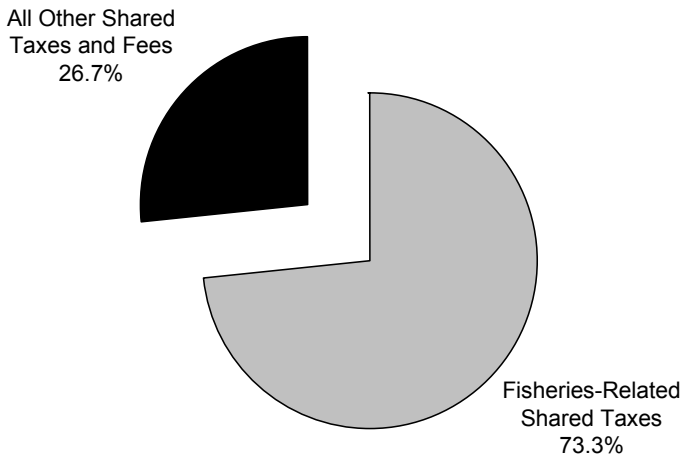
Despite the lack of local fish taxes, South Central's fisheries-related revenues account for a large portion of the region's shared tax income by means of the state fish tax. Table 3.3-12 depicts the revenue generated for South Central Alaska for each of the shared fisheries taxes. As illustrated in Figure 3.3-3, 73.3 percent of the region's shared taxes and fees were fisheries-related in fiscal year 1999. The region's share of the fisheries business tax and fishery resource landing tax amounted to $1,521,569 in that year. As Figure 3.3-4 illustrates, the shared tax revenue has been variable year to year. In 1999, it was off some 43 percent from 1993, when it represented $2,673,325 of the region's revenue. The fishery resource landing tax for the South Central region was of relatively little importance to the overall fishery shared taxes revenue, unlike the Aleutians region, but like the Kodiak and Southeast regions.

Table 3.3-12. Fisheries-Related Shared Taxes in the South Central Alaska Region, Fiscal Years 1993-1999

	1993	1994	1995	1996	1997	1998	1999
Shared Fisheries Business Tax Revenue ($)	2,673,325	1,467,513	1,926,890	1,759,709	1,791,212	2,059,010	1,474,325
Shared Fishery Resource Landing Tax Revenue ($)			13,225	50,900	28,572	6,110	47,244
Total Fisheries-Related Shared Tax Revenue ($)	2,673,325	1,467,513	1,940,115	1,810,609	1,819,784	2,065,120	1,521,569

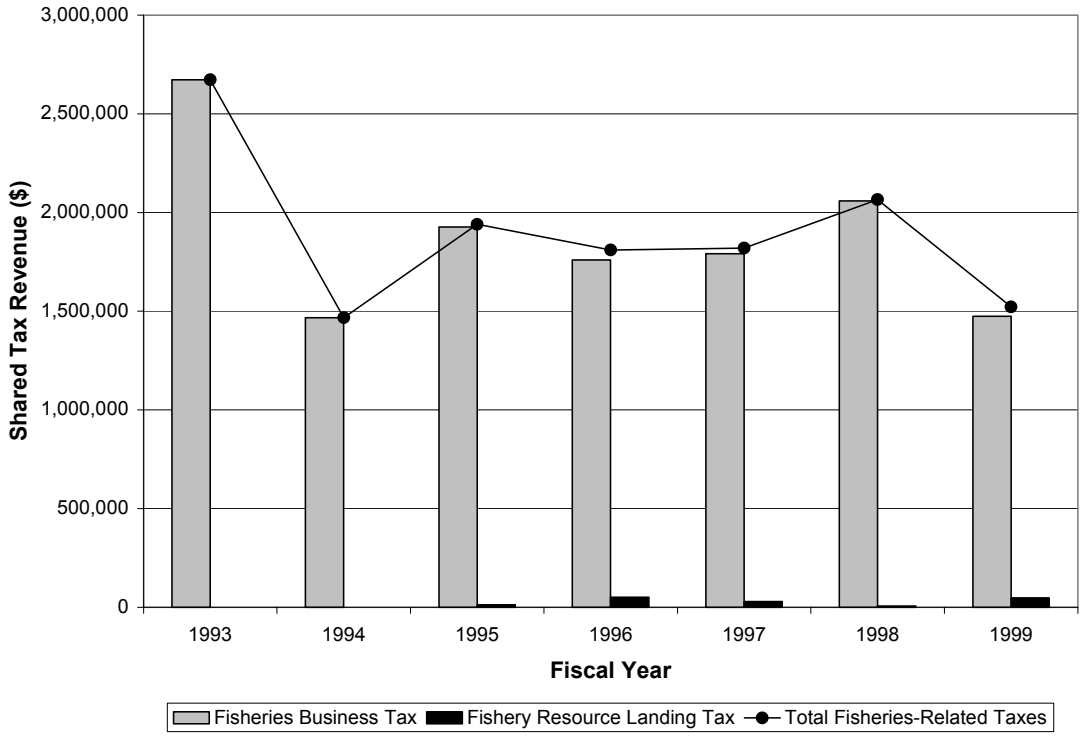
Source: ADOR, 2000.

Figure 3.3-3. Percentage of Fisheries-Related Shared Taxes and Fees in the South Central Region, Fiscal Year 1999.



Source: ADOR, 2000.

Figure 3.3-4. Fisheries-Related Shared Taxes in the South Central Region, Fiscal Years 1993-1999



Source: ADOR, 2000.

3.3.6 Inshore Groundfish Processing

Table 3.3-13 provides information on the number of tons of groundfish processed at shoreplants physically located within the region, reflecting the volume of fish coming ashore. Table 3.3-14 shows the number of entities processing this volume. Table 3.3-15 provides information, by species, of the processed product value at shoreplants within the region.

For the Southcentral region, the volume of groundfish processed has varied from year-to-year over the 1992-2000 period, and fell sharply from 1998 to 1999-2000. The number of shoreplants ranged between 15 and 21 over the period 1992-2000, while the volume of groundfish processed product has been around $30 million during 1998-2000, following a peak of $40 million in 1997. In 2000, 17 regional plants reported processing groundfish in Anchorage (2), Cordova (3), Homer (5), Kenai (4), Ninilchik (1), and Seward (2).

Table 3.3-13. Round Weight Tons of Groundfish Processed by Shoreplants in the Southcentral Alaska Region, 1992-2000

Year	Thousands of Tons
	SCSP
1992	12.86
1993	12.88
1994	11.97
1995	12.82
1996	12.65
1997	16.90
1998	17.69
1999	10.82
2000	10.01

Source: NMFS Blend and Weekly Production Report Data, June 2001.

Table 3.3-14. Number of Shoreplants in the Southcentral Alaska Region, 1992-2000

Year	Number of Shoreplants
	SCSP
1992	18
1993	16
1994	19
1995	18
1996	15
1997	21
1998	19
1999	15
2000	17

Source: NMFS Blend Data, 2001

Table 3.3-15. Value of Groundfish Processed Product by Shoreplants in the Southcentral Alaska Region, 1992-2000

Year	$Millions
	SCSP
1992	25.68
1993	31.26
1994	28.78
1995	39.91
1996	34.91
1997	40.28
1998	31.68
1999	29.77
2000	32.21

Source: NMFS Blend and Weekly Production Report Data, June 2001.

Table 3.3-16 provides summary information for processing occurring onshore within the region. Both volume and value are tracked.

As shown, the Southcentral region has a low volume of total tons processed, and a high value per ton when compared to the Aleutian and Kodiak regions. This is consistent with a relatively low dependence on the high volume, low per-unit-value of the pollock fishery.

Table 3.3-16. Processing Summary of South Central Region Plants, 1992-1999

Year	1992	1993	1994	1995	1996	1997	1998	1999
Total Tons[a] (1,000 mt)	13.0	13.2	12.0	13.1	13.5	16.5	17.7	10.8
Total Product[b] (1,000 mt)	6.6	6.6	5.3	7.1	6.8	9.0	9.7	6.6
Utilization Rate[c] (percent)	50.6	50.1	44.2	54.0	50.8	54.6	54.8	61.2
Product Value[d] ($ millions)	25.7	31.3	28.8	40.0	35.0	39.9	32.0	26.3
Value per Ton[e] ($ per mt)	1,968.3	2,362.6	2,393.5	3,058.9	2,600.3	2,421.1	1,808.8	2,426.3

Notes:

[a]Total groundfish reported tons—retained and discarded (1,000 mt) from NMFS Blend Data.

[b]Total groundfish final product (1,000 mt) from NMFS Weekly Production Reports.

[c]Total final product as a percent of total groundfish reported tons (row 2 divided by row 1).

[d]Total final product value ($ millions) from NMFS Weekly Production Reports with product prices from ADF&G Commercial Operator Annual Reports.

[e]Total value of final product per round weight ton reported (row 4 divided by row 1).

Table 3.3-17 shows employment specifically attributable to the various sectors that process groundfish in the region or, for the mobile processing sectors, are owned by residents of the region. Table 3.3-18 provide parallel information on payments to labor for the same sectors.

As shown, there is relatively little overall processing employment in the Southcentral region. The employment that does exist is concentrated almost exclusively among regional shoreplants and longline catcher-processors. Over the period 1992-2000, employment in the shoreplants was typically more than double that in the regionally owned catcher-processors. The pattern of payments to labor was similar to that for employment.

Table 3.3-17. Groundfish Processing FTE Employment on At-Sea Processors Owned by Residents or Shore-Based Processors in the Southcentral Alaska Region, 1992-2000

Year	Processing FTE Employment in the Region													
	ST-CP	FT-CP	HT-CP	P-CP	L-CP	BSP-SP	APA-SP	K-SP	SC-SP	SE-SP	MS	FLT	OTHER	Total
1992	0.00	0.00	0.00	1.15	51.51	0.00	0.00	1.43	80.88	0.00	0.00	7.14	0.01	142.11
1993	0.00	0.00	0.00	a	37.71	0.00	0.00	2.02	103.00	0.00	0.00	5.67	a	148.40
1994	0.00	0.00	0.00	0.00	31.74	0.00	0.00	1.98	90.57	0.00	0.00	6.86	0.00	131.16
1995	0.00	0.00	0.00	0.00	45.24	0.00	0.00	2.44	111.71	0.00	0.00	28.16	0.00	187.54
1996	0.00	0.00	0.00	0.00	42.60	0.00	0.00	1.99	86.31	0.00	0.00	12.82	0.00	143.73
1997	0.00	0.00	0.00	0.00	58.96	0.00	0.00	2.21	176.97	0.00	0.00	0.00	a	238.14
1998	0.00	0.00	0.00	0.00	42.43	0.00	0.00	2.33	177.21	0.00	0.00	0.00	a	221.97
1999	0.00	0.00	0.00	0.00	47.00	0.00	2.33	2.33	105.42	0.00	0.00	0.00	0.00	157.07
2000	0.00	0.00	0.00	0.00	49.64	0.00	1.72	2.24	79.41	0.00	0.00	0.00	a	133.01

Note: All employment on at-sea processors (including floaters) and administrative employment at all processors are assigned to the owners region. On-site employment at shore plants are assigned to the region in which the plant is located.

For all sectors, additional payments to labor for admininstrative and office personnel are assigned to the owners region.

a Added to Floaters to ensure confidentiality.

b In order to protect confidentiality, all at-sea and administrative payments to labor for this year reflect averages for the sectors are not adjusted to reflect regional differences.

Table 3.3-18. Adjusted Groundfish Processing Payments to Labor for Shoreside Processors in the Region and for At-sea Processors Owned by Residents of the Southcentral Alaska Region, 1992-2000

Year	$Millions													
	ST-CP	FT-CP	HT-CP	P-CP	L-CP	BSP-SP	APA-SP	K-SP	SC-SP	SE-SP	MS	FLT	OTHER	Total
1992	0.00	0.00	0.00	0.11	2.73	0.00	0.00	0.45	8.83	0.00	0.00	0.26	0.01	12.39
1993	0.00	0.00	0.00	a	1.64	0.00	0.00	0.56	11.07	0.00	0.00	0.39	a	13.66
1994	0.00	0.00	0.00	0.00	1.72	0.00	0.00	0.65	10.02	0.00	0.00	0.43	0.01	12.83
1995	0.00	0.00	0.00	0.00	2.10	0.00	0.00	0.70	14.00	0.00	0.00	1.03	0.00	17.83
1996	0.00	0.00	0.00	0.00	2.16	0.00	0.00	0.59	12.02	0.00	0.00	0.35	0.00	15.12
1997	0.00	0.00	0.00	0.00	2.66	0.00	0.00	0.57	14.10	0.00	0.00	0.00	a	17.33
1998	0.00	0.00	0.00	0.00	2.23	0.00	0.00	0.56	10.83	0.00	0.00	0.00	a	13.63
1999	0.00	0.00	0.00	0.00	3.27	0.00	0.62	0.64	10.22	0.00	0.00	0.00	0.00	14.74
2000	0.00	0.00	0.00	0.00	3.24	0.00	0.46	0.64	11.30	0.00	0.00	0.00	a	15.63

Note: All payments to labor from at-sea processors (including floating inshore plants) are assigned to the owners region. On-site payments to labor from shore plants are assigned to the region in which the plant is located.

For all sectors, additional payments to labor for admininstrative and office personnel are assigned to the owners region.

a Added to Floating Inshore Processors to ensure confidentiality.

3.3.7 Processing Ownership and Activity

Table 3.3-19 provides information on processors owned by residents of the region. This information is broken out by sector for both shore based and mobile processors.

As shown, for the Southcentral region, ownership is highly concentrated in the shoreplant sector, with a secondary cluster in longline catcher processors. No other sector has had more than one entity owned by residents since 1996.

Table 3.3-19. Number of Processors Owned by Residents of the Southcentral Alaska Region, 1992-2001

Year	Number of Processors													
	ST-CP	FT-CP	HT-CP	P-CP	L-CP	BSP-SP	APA-SP	K-SP	SC-SP	SE-SP	MS	FLT	OTHER	Total
1992	0	0	0	1	5	0	0	1	10	0	0	1	1	19
1993	0	0	0	0	3	0	0	1	9	0	0	2	1	16
1994	0	0	0	0	3	0	0	1	10	0	0	3	2	19
1995	0	0	0	0	3	0	0	1	10	0	0	5	0	19
1996	0	0	0	0	3	0	0	1	8	0	0	2	0	14
1997	0	0	0	0	4	0	0	1	14	0	0	0	0	19
1998	0	0	0	0	3	0	0	1	11	0	0	0	0	15
1999	0	0	0	0	3	0	1	1	8	0	0	0	0	13
2000	0	0	0	0	3	0	1	1	11	0	0	0	0	16

Source: NMFS Blend Data, June 2001.

The following group of four tables provides more detailed information on a species break-out basis for regionally owned processors. Table 3.3-20 provides information on the number of regionally owned processors by species by year (as processors may participate in more than one fishery, the subtotals exceed the total number of regionally owned processors). Table 3.3-21 provides information on the volume of fish, by species, processed at these plants. Table 3.3-22 displays information on the wholesale production value by species at these plants. Table 3.3-23 provides information on adjusted processing revenues, by sector, for regionally owned processors.

As shown, groundfish processors in the region tend to process multiple species. Pacific cod has dominated processing volumes in most recent years, but in terms of value, ARSO exceed Pacific cod from 1992 until 1996, since which time Pacific cod has remained the most valuable species. Examined on a sector basis, regional shoreplants lead in processing revenues, but shoreplants owned by Southcentral residents in other regions have grown in relative importance in 1999-2000. As shown, longline catcher processors have remained an important component of regionally owned processing revenue.

Table 3.3-20. Number of Processors Owned by Residents of the Southcentral Alaska Region, by Groundfish Species, 1992-2000

Year	Number of Processors				
	ARSO	FLAT	PCOD	PLCK	Total
1992	19	18	18	11	19
1993	16	16	15	10	16
1994	18	17	18	9	19
1995	19	17	15	13	19
1996	14	13	14	11	14
1997	19	17	14	14	19
1998	15	14	13	10	15
1999	13	13	13	12	13
2000	16	16	15	13	16

Source: NMFS Blend Data, 2001

Table 3.3-21. Round Weight Tons Processed at Processors Owned by Residents of the Southcentral Alaska Region, by Groundfish Species, 1992-2000

Year	Thousands of Tons				
	ARSO	FLAT	PCOD	PLCK	Total
1992	4.24	1.81	9.27	4.14	19.46
1993	5.13	3.83	8.17	3.89	21.03
1994	3.70	1.84	6.73	7.49	19.76
1995	3.60	3.06	12.49	3.40	22.55
1996	2.64	3.30	11.43	2.59	19.96
1997	3.17	3.93	11.63	7.97	26.70
1998	2.82	1.90	8.47	10.96	24.15
1999	3.27	2.75	13.37	5.02	24.40
2000	4.49	3.51	12.33	2.81	23.13

Note: Values include “Ghost” processors.

Source: NMFS Blend and Weekly Production Report Data, June 2001

Table 3.3-22. Wholesale Production Value for Processors Owned by Residents of the Southcentral Alaska Region by Species, 1992-2000

Year	$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	12.18	1.02	8.31	2.28	23.79
1993	15.11	2.55	8.10	2.01	27.77
1994	14.70	1.18	6.25	3.82	25.94
1995	15.28	2.43	14.52	3.24	35.47
1996	9.44	2.90	13.86	1.60	27.80
1997	10.18	2.59	13.84	5.88	32.49
1998	5.86	1.43	9.36	7.82	24.47
1999	8.54	1.11	20.71	3.23	33.59
2000	12.10	2.52	19.46	1.35	35.43

Source: NMFS Weekly Production Reports, June 2001
Note: Values include "Ghost" processors.

Table 3.3-23. Adjusted Groundfish Processing Revenues at Processors Owned by Residents of the Southcentral Alaska Region, 1992-2000

Year	$Millions													
	ST-CP	FT-CP	HT-CP	P-CP	L-CP	BSP-SP	APA-SP	K-SP	SC-SP	SE-SP	MS	FLT	OTHER	Total
1992	0.00	0.00	0.00	0.37	6.82	0.00	0.00	4.53	11.26	0.00	0.00	0.75	0.06	23.79
1993	0.00	0.00	0.00	a	4.11	0.00	0.00	5.62	16.94	0.00	0.00	1.10	a	27.77
1994	0.00	0.00	0.00	0.00	4.29	0.00	0.00	6.51	13.85	0.00	0.00	1.24	0.05	25.94
1995	0.00	0.00	0.00	0.00	5.24	0.00	0.00	7.01	20.28	0.00	0.00	2.94	0.00	35.47
1996	0.00	0.00	0.00	0.00	5.39	0.00	0.00	5.93	15.48	0.00	0.00	1.01	0.00	27.80
1997	0.00	0.00	0.00	0.00	6.66	0.00	0.00	5.71	20.12	0.00	0.00	0.00	a	32.49
1998	0.00	0.00	0.00	0.00	5.58	0.00	0.00	5.62	13.27	0.00	0.00	0.00	a	24.47
1999	0.00	0.00	0.00	0.00	8.16	0.00	6.19	6.39	12.86	0.00	0.00	0.00	0.00	33.59
2000	0.00	0.00	0.00	0.00	8.09	0.00	4.58	6.39	16.36	0.00	0.00	0.00	a	35.43

a Added to Floating Inshore Processors to ensure confidentiality.
b Due to confidentiality restrictions, all values for this year reflect averages for the processor classes and are not adjusted to reflect regional differences.

3.3.8 Vessel Ownership and Activity

Tables 3.3-24 through 3.3-26 provide general descriptive information on regionally owned catcher vessels. Table 3.3-24 shows the number of vessels within the length and gear based sector classes as defined in the sector profiles section (Section 2) of this document. Table 3.3-25 contains information the number of catcher vessels by species group (as an individual vessel typically participates in more than one fishery, the subtotals exceed the total number of regionally owned vessels). Table 3.3-26 provides information on the number of vessels owned within the region based strictly on vessel size (irrespective of gear type).

As shone in these tables, ownership in the Southcentral region is concentrated among fixed gear vessels. In 2000, only three trawl vessels of any size were owned by regional residents. These represent 1 percent of all vessels in the region. Pot and longline catcher vessels combined, make up 15 percent of the region's vessel total. Participation is directed primarily toward Pacific cod (84 percent of vessels in 2000) and ARSO (72 percent of vessels in 2000). Nineteen percent of regionally owned groundfish vessels and 6 percent of vessels fished pollock and flatfish respectively in 2000. When examined by length, regionally owned vessels in the most recent years cluster around the 33-39′ and 40-44′ classes, with a secondary cluster in the 60-79′ class.

Table 3.3-24. Number of Catcher Vessels Owned by Residents of the Southcentral Alaska Region, 1992-2000

Year	Number of Vessels										
	TCV BSP ≥ 125	TCV BSP 60-124	TCV Div. AFA	TCV Non-AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	GHOST	Total
1992	0	3	0	3	3	21	26	232	51	83	422
1993	0	1	0	3	4	8	25	203	44	39	327
1994	0	1	0	1	4	4	33	205	55	57	360
1995	0	1	0	2	1	18	22	158	35	48	285
1996	0	0	0	2	3	16	19	125	25	58	248
1997	0	1	0	2	2	8	12	143	28	62	258
1998	0	0	0	3	1	10	11	125	21	34	205
1999	0	0	1	2	1	17	8	119	21	35	204
2000	0	0	1	2	0	23	11	132	28	32	229

Source: CFEC/ADF&G Fish-Ticket and NMFS Observer Data. June, 2001.

Table 3.3-25. Number of Catcher Vessels Owned by Residents of the Southcentral Alaska Region by Species, 1992-2000

Year	Number of Vessels				
	ARSO	FLAT	PCOD	PLCK	Total
1992	344	17	337	25	422
1993	297	14	187	16	327
1994	331	6	138	6	360
1995	243	7	195	10	285
1996	214	16	162	20	248
1997	217	13	195	33	258
1998	163	17	168	24	205
1999	150	7	168	31	204
2000	164	13	193	44	229

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

Table 3.3-26. Number of Catcher Vessels Owned by Residents of the Southcentral Alaska Region, by Vessel Length, 1992-2000

Year	Number of Vessels																		
	≤20'	21'-24'	25'-28'	29'-32'	33'-39'	40'-44'	45'-49'	50'-54'	55'-59'	60'-79'	80'-94'	95'-109'	110'-124'	125'-139'	140'-154'	155'-169'	170'+	(blank)	Total
1992	1	4	11	60	108	82	52	23	18	40	15	1	4	2	0	1	0	0	422
1993	1	5	12	41	85	75	43	17	11	26	7	2	1	1	0	0	0	0	327
1994	1	3	6	57	89	88	42	19	11	32	8	3	1	0	0	0	0	0	360
1995	0	3	5	37	67	67	33	13	12	31	12	2	2	1	0	0	0	0	285
1996	0	2	4	28	56	66	26	11	14	23	12	3	2	1	0	0	0	0	248
1997	2	2	9	31	64	69	22	13	17	20	7	1	0	0	0	0	0	1	258
1998	1	0	4	25	39	63	15	10	18	20	8	1	0	1	0	0	0	0	205
1999	1	0	4	20	46	59	15	7	17	21	10	3	0	1	0	0	0	0	204
2000	1	1	5	27	46	68	19	8	15	21	8	4	4	1	0	0	1	0	229

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

Table 3.3-27 displays information on employment on catcher vessels owned by regional residents, by gear/length class. Table 3.3-28 provides payment to labor information broken out by gear/length class, and Table 3.3-29 provides data on payments to labor on vessels broken out by species group.

As shown, the distribution of employment positions for the Southcentral region reflects the general distribution pattern of vessel ownership (with divergences accounted for by different crew sizes in the different classes). Payments to labor in the FGCV 33-59′ sector accounted for 56 percent of all vessel payments to labor in 2000, and more than three times greater payments to labor than any other vessel sector. In 2000, ARSO and Pacific cod combined accounted for 92 percent of payments to labor, with Pacific cod outpacing ARSO by an approximately 3 to 2 ratio. In 2000, 84 percent of the regionally owned vessels fished in the Central GOA area, and 13 percent and 11 percent fished the Western and Eastern GOA areas respectively. Eight and six percent of vessels fished the Aleutian Islands and Bering Sea FMP areas respectively. In 2000, all regionally owned groundfish vessels targeted Pacific cod, while 23 percent reported Pollock landings.

Table 3.3-27. Number of Crewmembers on Catcher Vessels Owned by Resident of the Southcentral Alaska Region, 1992-2000

Year	Number of Crewmembers									
	TCV BSP ≥ 125	TCV BSP 60-124	TCV Div. AFA	TCV Non-AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	Total
1992	0	14	0	14	12	110	121	952	204	1,426
1993	0	5	0	14	16	39	121	828	176	1,198
1994	0	5	0	5	16	17	160	840	220	1,261
1995	0	5	0	9	4	94	105	648	140	1,004
1996	0	0	0	9	12	83	94	516	100	813
1997	0	5	0	9	8	39	66	580	112	818
1998	0	0	0	14	4	50	44	516	84	711
1999	0	0	5	9	4	88	44	484	84	718
2000	0	0	5	9	0	121	50	544	112	840

Source: Estimates developed by Northern Economics based on vessel counts from CFEC/ADF&G Fish-Ticket and NMFS Observer Data

Table 3.3-28. Groundfish Payments to Labor on Catcher Vessels Owned by Residents of the Southcentral Alaska Region, by Sector, 1992-2000

Year	$Millions										
	TCV BSP ≥ 125	TCV BSP 60-124	TCV Div. AFA	TCV Non-AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	GHOST	Total
1992	0.00	1.57	0.00	0.26	0.14	0.58	0.90	3.25	0.18	0.01	6.89
1993	0.00	0.30	0.00	0.22	0.14	0.29	0.69	3.00	0.24	0.01	4.89
1994	0.00	0.30	0.00	0.07	0.14	0.12	0.77	2.87	0.20	0.01	4.47
1995	0.00	0.31	0.00	0.14	0.03	0.43	1.36	2.59	0.08	0.01	4.93
1996	0.00	0.00	0.00	0.15	0.12	0.40	1.05	1.85	0.09	0.01	3.67
1997	0.00	0.32	0.00	0.26	0.10	0.29	1.08	2.35	0.08	0.01	4.48
1998	0.00	0.00	0.00	0.23	0.05	0.31	0.54	1.79	0.07	0.01	2.99
1999	0.00	0.00	0.24	0.25	0.07	0.64	0.45	2.39	0.08	0.01	4.12
2000	0.00	0.00	0.24	0.25	0.00	0.88	0.92	3.07	0.13	0.01	5.50

Note: Estimated by multiplying he number of vessels associated with the region by the regionally weighted average payments to labor--using actual value for each region would compromise confidentiality.

Source: Estimated by Northern Economics

Table 3.3-29. Payments to Labor for Catcher Vessels Owned by Residents of the Southcentral Alaska Region by Species, 1992-2000

Year	$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	3.25	0.06	1.97	1.60	6.89
1993	3.02	0.05	1.19	0.62	4.89
1994	2.92	0.06	0.73	0.76	4.47
1995	2.76	0.02	1.48	0.67	4.93
1996	1.98	0.04	1.49	0.16	3.67
1997	2.51	0.05	1.80	0.12	4.48
1998	1.39	0.04	1.45	0.11	2.99
1999	1.48	0.04	2.36	0.24	4.12
2000	2.11	0.08	2.94	0.37	5.50

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

Note: Values for Ghost Vessels have been included in the data set in order to minimize instances where data can not be reported due to NMFS confidentiality provisions. In all cases the values for Ghost Vessels are negligible.

Table 3.3-30. Number of Catcher Vessels Owned by Residents of the Southcentral Alaska Region, by FMP Subarea, 1992-2000

Year	Number of Vessels					
	AI	BS	WG	CG	EG	Total
1992	7	31	34	397	55	422
1993	2	17	14	307	65	327
1994	5	19	9	324	83	360
1995	6	30	14	262	70	285
1996	3	20	17	224	57	248
1997	2	16	19	241	34	258
1998	6	22	25	188	31	205
1999	10	8	26	181	21	204
2000	18	15	31	193	26	229

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

Table 3.3-31. Number of Catcher Vessels Owned by Residents of Southcentral Alaska Region with Pacific Cod and Pollock Landings by FMP Subarea, 1992-2000

Year	Number of Vessels												
	PCOD						PLCK						PCOD & PLCK Total
	AI	BS	WG	CG	EG	PCOD Total	AI	BS	WG	CG	EG	PLCK Total	
1992	5	26	19	318	18	337	1	5	5	19	0	25	338
1993	1	7	9	176	21	187	1	3	2	13	1	16	188
1994	1	14	6	122	20	138	1	1	1	5	0	6	138
1995	1	25	7	167	21	195	0	2	1	10	0	10	195
1996	0	11	7	142	18	162	0	1	1	18	3	20	165
1997	0	6	10	183	10	195	0	2	2	30	2	33	196
1998	0	7	17	154	10	168	0	3	4	19	3	24	168
1999	7	5	17	145	5	168	0	1	1	31	0	31	169
2000	8	12	23	162	4	193	1	2	2	41	2	44	193

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

Table 3.3-32 provides information on the resident catcher vessel fleet in terms of the value of the retained harvest by FMP subarea. Table 3.3-33 details this information of pollock and Pacific cod specifically.

Similar to the volume data, the value data highlight the importance of the Central GOA area to the Southcentral region resident fleet in the years since 1992. In 2000, the Central GOA accounted for 71 percent of ex-vessel harvest value. Analysis of relative geographic distribution of pollock is problematic due to confidentiality restrictions.

Table 3.3-32. Ex-Vessel Value of Harvest by Catcher Vessels Owned by Residents of the Southcentral Alaska Region by FMP Subarea, 1992-2000

Year	$Millions					
	AI	BS	WG	CG	EG	Total
1992	0.39	4.33	1.68	8.97	1.86	17.22
1993	a	1.75	0.68	7.90	1.89	12.21
1994	0.08	2.14	0.24	6.38	2.33	11.17
1995	0.09	1.97	0.61	7.71	1.95	12.33
1996	a	0.64	0.88	6.35	1.30	9.17
1997	a	0.68	1.02	7.84	1.67	11.21
1998	0.18	0.74	0.74	5.22	0.59	7.47
1999	0.34	0.36	1.01	8.19	0.40	10.31
2000	0.77	0.61	1.83	9.72	0.83	13.75

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

[a] Combined with value from BS to protect the confidentiality of the small number of CVs from this region that reported catching these species during the year.

Table 3.3-33. Ex-Vessel Value of Pacific Cod and Pollock Landings by Catcher Vessels Owned by Residents of the Southcentral Alaska Region by FMP Subarea, 1992-2000

Year	$Millions												
	PCOD						PLCK						PCOD & PLCK Total
	AI	BS	WG	CG	EG	PCOD Total	AI	BS	WG	CG	EG	PLCK Total	
1992	0.06	0.70	0.93	3.23	0.01	4.92	a	3.70	0.31	0.04	0.00	4.00	8.93
1993	a	0.68	0.51	2.13	0.17	2.98	b	b	b	1.56	b	1.56	4.53
1994	a	0.38	0.13	1.31	0.13	1.81	b	b	b	1.89	0.00	1.89	3.71
1995	a	0.53	0.12	3.15	0.01	3.70	0.00	b	b	1.68	0.00	1.68	5.38
1996	0.00	0.18	0.30	3.21	0.04	3.73	0.00	b	b	0.39	b	0.39	4.12
1997	0.00	0.22	0.38	3.89	0.02	4.51	0.00	b	b	0.29	b	0.29	4.80
1998	0.00	0.46	0.25	2.89	0.03	3.62	0.00	b	0.12	0.17	b	0.28	3.90
1999	0.20	0.06	0.40	5.24	0.00	5.91	0.00	b	b	0.60	0.00	0.60	6.51
2000	0.42	0.31	0.73	5.87	0.00	7.34	b	b	b	0.92	b	0.92	8.26

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

[a] Combined with value of BS to protect the confidentiality of the small number of CVs in the region that reported catching these species in this subarea during the year.

[b] Combined with value of CG to protect the confidentiality of the small number of CVs in the region that reported catching these species in this subarea during the year.

Table 3.3-34 provides information on value of harvest broken out by gear and length vessel class. Table 3.3-35 provides information on retained catch by regionally owned catcher vessels, by groundfish species. Table 3.3-36 provides parallel value information for these vessels.

Several features of the Southcentral fleet are apparent from these tables. The relative importance of the FGCV 33-59′ class is clear, as is the relative economic importance of ARSO and Pacific cod. Combined ex-vessel values for ARSO and Pacific cod represent 92 percent of the total ex-vessel value for regionally owned vessels.

Table 3.3-34. Ex-Vessel Value of Catcher Vessels by Sector from the Southcentral Alaska Region, 1992-2000

Year	Value of Catcher Vessels by Sector ($Millions)										
	TCV BSP ≥ 125	TCV BSP 60-124	TCV Div. AFA	TCV Non-AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	GHOST	Total
1992	0.00	3.92	0.00	0.64	0.36	1.45	2.24	8.12	0.45	0.04	17.22
1993	0.00	0.74	0.00	0.56	0.34	0.72	1.74	7.51	0.60	0.02	12.21
1994	0.00	0.74	0.00	0.18	0.34	0.30	1.92	7.18	0.50	0.02	11.17
1995	0.00	0.76	0.00	0.35	0.08	1.07	3.40	6.47	0.19	0.02	12.33
1996	0.00	0.00	0.00	0.37	0.29	1.01	2.63	4.64	0.22	0.02	9.17
1997	0.00	0.81	0.00	0.64	0.25	0.73	2.70	5.87	0.19	0.02	11.21
1998	0.00	0.00	0.00	0.58	0.13	0.77	1.35	4.47	0.16	0.01	7.47
1999	0.00	0.00	0.60	0.61	0.18	1.60	1.12	5.97	0.19	0.03	10.31
2000	0.00	0.00	0.60	0.62	0.00	2.20	2.30	7.68	0.33	0.02	13.75

Source: CFEC/ADF&G Fish-Ticket and NMFS Observer Data. June, 2001.

Note: Ex-vessel values shown reflect the adjusted average earned by each class multiplied by the number of vessels owned by residents of the region. Regional adjustment factors were employed to account for relative productivity differences among regions.

Table 3.3-35. Retained Tons of Groundfish by Catcher Vessels Owned by Residents of the Southcentral Alaska Region by Species, 1992-2000

Year	Thousands of Tons				
	ARSO	FLAT	PCOD	PLCK	Total
1992	3.5	0.5	9.9	18.6	32.5
1993	3.5	0.4	6.6	10.2	20.6
1994	2.8	0.8	5.0	11.1	19.7
1995	2.0	0.1	7.4	8.8	18.4
1996	1.5	0.2	7.6	2.1	11.3
1997	1.6	0.1	8.8	1.3	11.8
1998	1.2	0.2	8.0	2.0	11.4
1999	1.3	0.2	8.1	2.8	12.4
2000	1.8	1.0	9.1	3.6	15.5

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

Note: Values for Ghost Vessels have been included in the data set in order to minimize instances where data can not be reported due to NMFS confidentiality provisions. In all cases the values for Ghost Vessels are negligible.

Table 3.3-36. Ex-Vessel Value of Harvest by Catcher Vessels Owned by Residents of the Southcentral Alaska Region, 1992-2000

Year	$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	8.14	0.16	4.92	4.00	17.22
1993	7.55	0.13	2.98	1.56	12.21
1994	7.31	0.16	1.81	1.89	11.17
1995	6.91	0.04	3.70	1.68	12.33
1996	4.94	0.11	3.73	0.39	9.17
1997	6.28	0.12	4.51	0.29	11.21
1998	3.47	0.10	3.62	0.28	7.47
1999	3.71	0.09	5.91	0.60	10.31
2000	5.28	0.20	7.34	0.92	13.75

Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001

Note: Values for Ghost Vessels have been included in the data set in order to minimize instances where data can not be reported due to NMFS confidentiality provisions. In all cases the values for Ghost Vessels are negligible.

Table 3.3-37 provides information on the specific location of the regionally owned fleet. This, in turn, provides an indication of the subregional distribution of catcher vessel-related harvest volume and value as well as employment.

As shown, within the Alaska Southcentral region, Homer has about one-third of all of the groundfish vessels owned within the region, outdistancing the community with the next highest vessel count by a factor of well over 2. Homer also accounts for about one-quarter of total value landed by the regionally owned fleet. Anchorage, Cordova, and Seward have between 8 and 14 percent of the fleet in each community, and each accounts for between 13 and 19 percent of the total value of catch for the regional fleet. No other community accounts for more than 8 percent of the regional fleet, or for more than 5 percent of the harvest value of the regionally owned fleet.

Table 3.3-37. Community Rankings by Alaska Groundfish Catcher Vessels Owned by Residents of the Alaska Southcentral Region, 1992-2000

City	Total Value a	No. of Vessels
	Percent of Region Total	
Homer	26.2	32.0
Anchorage	19.1	13.6
Cordova	14.6	9.4
Seward	13.2	8.4
Anchor Point	5.1	7.6
Kenai	4.1	4.9
Wasilla	2.4	3.1
Seldovia	2.3	2.4
Valdez	1.7	1.8
Nikiski	1.4	1.0
Nikolaevsk	1.3	2.2
Kasilof	1.0	1.5
Fritz Creek	1.0	0.9
Palmer	0.9	1.0
Eagle River	0.8	1.3
Girdwood	0.8	1.2
Ninilchik	0.7	1.3
Soldotna	0.7	1.0
Big Lake	0.5	0.1
Halibut Cove	0.4	0.3
Willow	0.4	0.7
Whittier	0.3	1.0
Clam Gulch	0.2	0.4
Chenega Bay	0.2	0.4
Ivanof Bay	0.2	0.3
Port Graham	0.2	0.3
Tatitlek	0.2	0.3
Sterling	0.1	0.1
Nikishka	0.1	0.1
Glennallen	0.0	0.3
Chugiak	0.0	0.1
Talkeetna	0.0	0.1

Note: Communities are ranked based on each community's percent of the historical total value for the region.

a Total value percentage for each community is based on average revenue of each catcher vessel by type and adjusted using regional-adjustment factor.

Source: Calculated by Northern Economics using CFEC/ADF&G Fish Ticket Data, July 2001

3.3.9 Harvest Diversity

Table 3.3-38 provides information on the relative value of groundfish and non-groundfish species (salmon, crab, halibut, other) to regionally owned catcher vessels for the years 1999 and 2000. In addition to showing annual totals, this information is presented on a monthly basis to show the 'annual round' of the fisheries, and to allow a consideration of the changing relative importance of the different species complexes during different times of the year. Table 3.3-39 provides a summary break-out of the relative value of non-groundfish species on an annual basis for the period 1992-2000. Figures 3.3-5 and 3.3-6 depicted the same information. This provides an easy comparison of the relative worth to owners of these species. Table 3.3-40 provides a count of regionally owned groundfish vessels participating in the non-groundfish fisheries by species for 1992-2000, which is illustrated in Figure 3.3-7. As individual vessels typically participate in more than one fishery, the subtotals exceed the total number of regionally owned vessels.

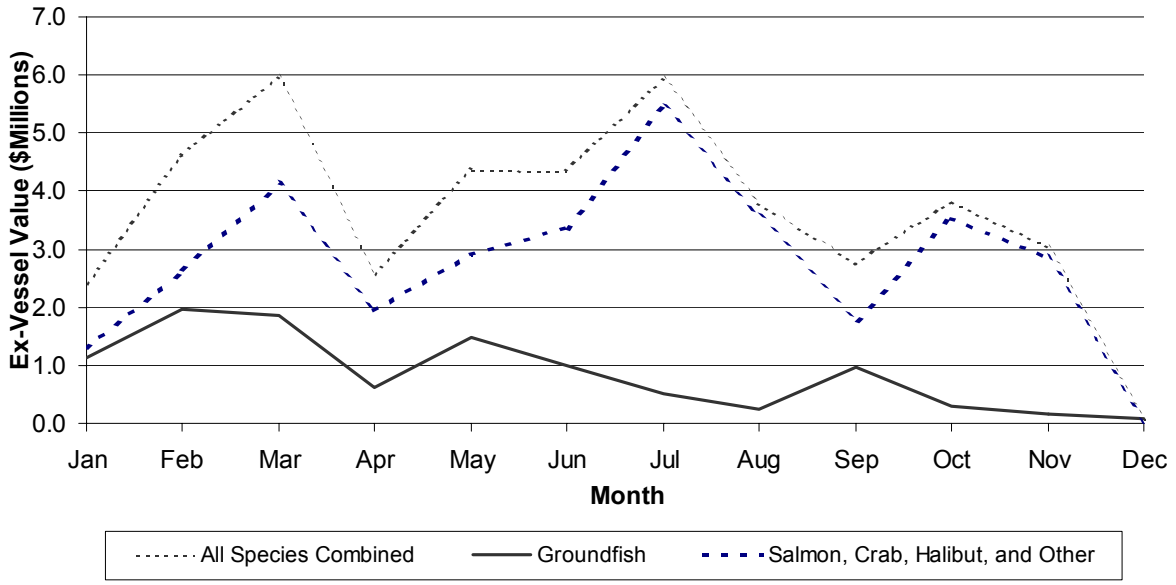
For the Southcentral region in 1999, groundfish accounted for approximately 24 percent of ex-vessel harvest value for regionally owned groundfish vessels. Dependency is relatively well distributed with halibut, crab, and salmon accounting for 30, 22, and 21 percent of total value respectively (The 2000 data are problematic because halibut information is missing.) Relative importance of the different species has fluctuated during the period 1992-2000, but the number of these vessels participating in the crab fishery has dropped precipitously over this period.

Table 3.3-38. Ex-Vessel Harvest Value of Groundfish, Salmon, Crab, Halibut, and Other Species by Residents of the Southcentral Alaska Region, by Month, 1999-2000

Year	Species	$Millions												
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
1999	Salmon	0.00	0.00	0.00	0.00	0.14	1.78	4.42	2.20	0.77	0.00	0.00	0.00	9.31
	Crab	1.26	2.62	2.43	0.77	0.33	0.02	0.00	0.00	0.00	2.41	0.01	0.00	9.84
	Halibut	0.00	0.00	1.50	1.14	1.97	1.55	0.83	1.25	1.02	0.99	2.85	0.00	13.11
	Other	0.00	0.00	0.19	0.03	0.45	0.01	0.20	0.09	0.00	0.12	0.01	0.01	1.13
	Groundfish	1.14	1.98	1.85	0.62	1.47	0.99	0.52	0.25	0.96	0.30	0.17	0.07	10.31
2000	Salmon	0.00	0.00	0.00	0.00	0.13	1.81	2.36	1.16	0.36	0.00	0.00	0.00	5.82
	Crab	0.00	0.08	0.04	3.48	0.03	0.18	0.00	0.20	0.37	2.77	0.00	0.00	7.16
	Halibut	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Other	0.00	0.00	0.00	0.00	0.47	0.00	0.01	0.08	0.00	0.11	0.07	0.00	0.73
	Groundfish	1.56	3.98	1.60	1.34	1.40	0.64	0.71	0.77	1.08	0.44	0.16	0.08	13.75

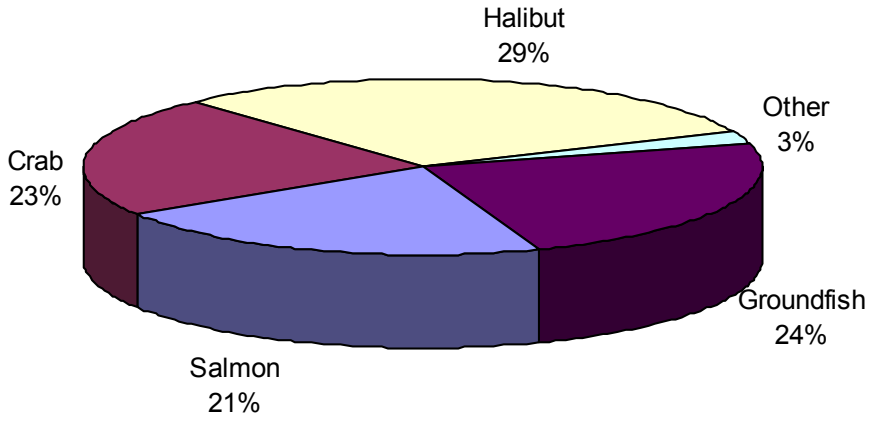
Source: CFEC/ADF&G Fish Tickets from NPFMC, June 2001

Figure 3.3-5. Ex-Vessel Harvest Value of Groundfish, Salmon, Crab, Halibut, and Other Species by Residents of the Southcentral Alaska Region, 1999



Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001.

Figure 3.3-6 Percent of Total Ex-Vessel Harvest Value by Residents of the Southcentral Alaska Region, 1999



Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001.

Table 3.3-39. Ex-Vessel Value of Non-Groundfish Harvested by Groundfish Vessels Owned by Residents of the Southcentral Alaska Region, by Species, 1992-2000

Year	$Millions				
	Salmon	Crab	Halibut	Other	Total
1992	19.79	6.71	7.73	2.19	36.41
1993	7.92	2.80	8.02	1.19	19.93
1994	12.23	2.85	12.10	1.36	28.54
1995	8.73	8.57	7.69	1.16	26.15
1996	6.61	6.70	9.30	1.69	24.30
1997	6.78	1.49	12.85	1.38	22.49
1998	5.24	3.99	8.68	0.85	18.76
1999	9.31	9.84	13.11	1.13	33.38
2000	5.82	7.16	0.00	0.73	13.71

Source: CFEC/ADF&G Fish Tickets from NPFMC, June 2001

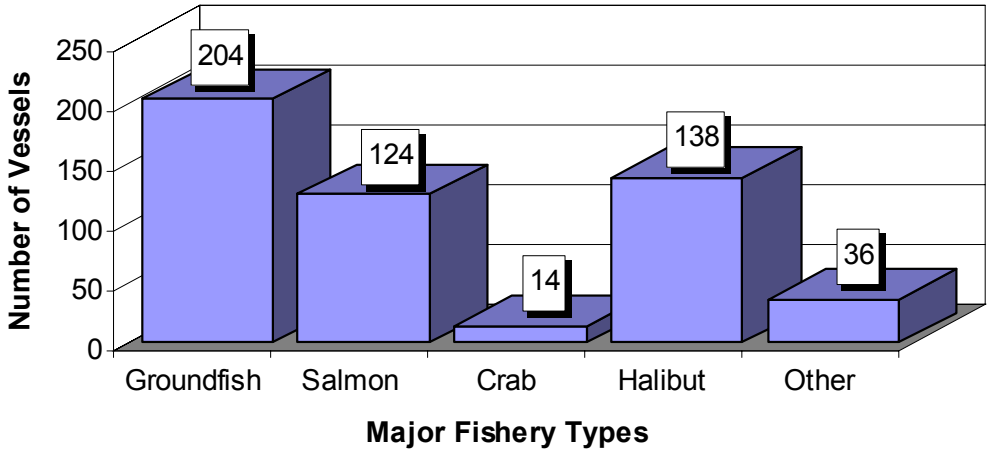
Table 3.3-40. Number of Groundfish Vessels Owned by Residents of the Southcentral Alaska Region Participating in Non-Groundfish Fisheries, by Species, 1992-2000

Year	Number of Vessels				
	Salmon	Crab	Halibut	Other	Total
1992	215	95	379	60	408
1993	185	81	304	38	319
1994	201	74	342	39	352
1995	160	28	190	33	260
1996	146	18	179	68	232
1997	148	11	174	66	225
1998	119	10	143	47	181
1999	124	14	138	36	180
2000	138	16	0	23	166

Source: CFEC/ADF&G Fish Tickets from NPFMC, June 2001

Note: 2000 halibut data are missing.

Figure 3.3-7. Number of Groundfish Vessels Owned by Residents of the Southcentral Alaska Region Participating in Non-Groundfish Fisheries, by Species, 1999



Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001.

3.3.10 Processing Diversity

Table 3.3-41 provides information on processor diversity across groundfish, salmon, crab, halibut, and other non-groundfish fisheries by enumerating processors present in the region. Table 3.3-42 displays information on ex-vessel value paid by all shorebased processors in the region, using the same species grouping as in the previous table. Figures 3.3-8 and 3.3-9 illustrate these same data.

For the Southcentral region, in 1999 more processors processed salmon (70 percent) than any other species complex (2000 data are problematic for analysis because halibut is missing from the data set). Crab was processed at 62 percent and halibut at 47 percent of the plants respectively. In terms of relative value, in 1999 salmon accounted for 53 percent of total ex-vessel value paid by processors. Halibut was a distant second at 29 percent, and groundfish accounted for 17 percent of total value.

Table 3.3-41. Total Number of Groundfish and Non-Groundfish Shorebased Processors in Southcentral Alaska Region by Species, 1992-2000

Year	Number of Processors					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	30	43	11	38	20	53
1993	21	43	10	38	21	54
1994	26	47	11	38	17	60
1995	28	45	5	30	10	57
1996	27	46	5	30	19	58
1997	38	43	6	33	21	60
1998	29	48	6	35	12	61
1999	35	39	2	28	10	56
2000	22	38	2	0	6	50

Notes: Includes all shore based facilities in the region including facilities that did not process groundfish. Data for halibut in 2000 were not available in time for inclusion.

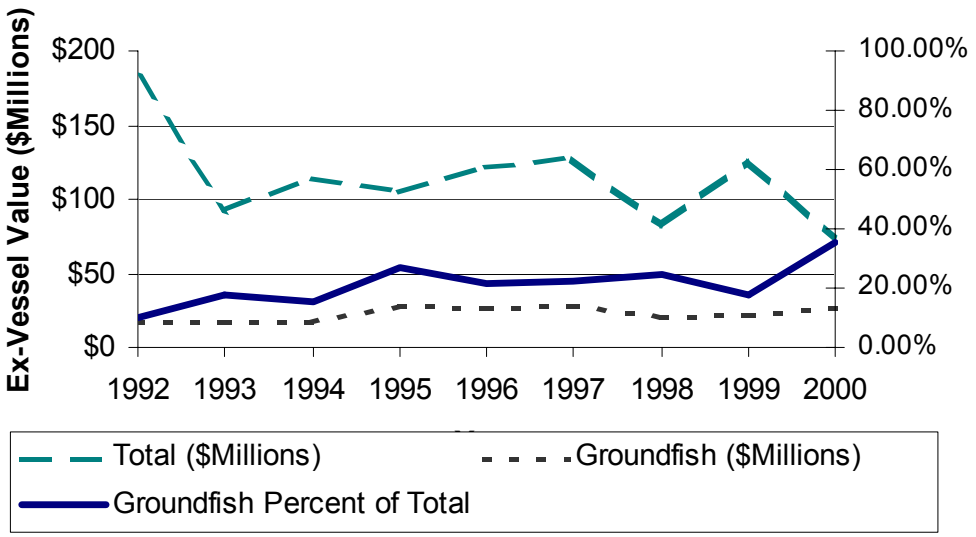
Table 3.3-42. Ex-Vessel Value Paid by All Processors In Southcentral Alaska Region by Species, 1992-2000

Year	$Millions					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	17.4	139.7	1.5	12.0	10.4	180.9
1993	16.2	59.3	1.8	12.2	3.3	92.7
1994	17.2	72.0	1.7	21.3	1.6	113.8
1995	27.9	57.9	0.4	14.6	3.3	104.1
1996	26.2	68.8	0.5	21.5	4.9	122.0
1997	28.4	73.9	0.2	24.2	1.4	127.9
1998	20.3	40.4	0.1	22.8	0.1	83.7
1999	21.8	67.3	a	36.6	0.1	125.8
2000	26.4	47.7	a	0.0	0.4	74.4

Notes: Includes all shore based facilities in the region including facilities that did not process groundfish. Data for halibut in 2000 were not available in time for inclusion.

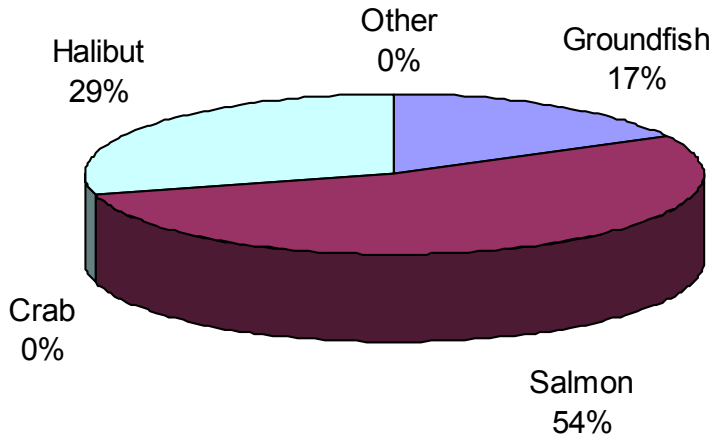
a Data for Crab added to Other for confidentiality

Figure 3.3-8. Ex-Vessel Value Paid by All Processors in Southcentral Alaska Region, by Species, 1999



Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001.

Figure 3.3-9. Percent total of Ex-Vessel Value Paid by All Processors in Southcentral Alaska Region, by Species, 1999



Source: CFEC/ADF&G Fish Tickets and NMFS Observer Data, June 2001.

3.3.11 Subsistence in the South Central Alaska Region

As noted, Cordova, Homer, Nikiski, Seward, and Anchorage are the regionally important groundfish communities in the South Central region. Subsistence in each of these communities is described in

this section. Subsistence data for groundfish for these communities, where known, shows a much lower level of use than is the case for the Aleutian and Kodiak Island regions.

Residents of Cordova are reported to harvest and consume about 179 pounds of subsistence resource per capita, based on a 1997 survey of an estimated 830 year round households for a total ADF&G effective population of 2,507 individuals (ADF&G 2000). Of the total of subsistence resources, 35 percent was salmon, 24 percent was non-salmon fish, 30 percent was land mammals, 2 percent was marine mammals, 1 percent was birds and eggs, 3 percent was marine invertebrates, and 5 percent was vegetation. Various groundfish are a component of the non-salmon fish and average about 4 percent of the total (7 pounds per capita). The major contributors to this component are rockfish (5 pounds) and cod (1 pound).

Homer was designated a "rural" community in May 2000. Prior to that time Homer residents had not been federally qualified subsistence users, so no data has been collected in recent years. Hence, the only available information on Homer's community pattern of subsistence use is fairly old. Residents of Homer are reported to harvest and consume about 94 pounds of subsistence resource per capita, based on a 1982 survey of an estimated 1,798 year round households for a total ADF&G effective population of 5633 individuals (ADF&G 2000). Of the total of subsistence resources, 21 percent was salmon, 32 percent was non-salmon fish, 25 percent was land mammals, 2 percent was birds and eggs, 18 percent was marine invertebrates, and 2 percent was vegetation. No groundfish were reported as part of the Homer subsistence harvest. This probably indicates a relatively low level of harvest, perhaps as incidental take while targeting some other species, rather than a complete absence of take.

Kenai's community pattern of use of subsistence resources is described as an indicator for Nikiski, as no information exists for Nikiski in the ADF&G subsistence database. Both Nikiski and Kenai had been classified as "non-rural" (non-subsistence) communities until the Federal Subsistence Board changed their classification in May 2000, when the board designated all communities on the Kenai Peninsula as "rural." The ADF&G subsistence database nonetheless includes some historical harvest information for Kenai. Residents of Kenai are reported to harvest and consume about 84 pounds of subsistence resource per capita, based on a 1993 survey of an estimated 2,274 year round households for a total ADF&G effective population of 6372 individuals (ADF&G 2000). Of the total of subsistence resources, 46 percent was salmon, 19 percent was non-salmon fish, 20 percent was land mammals, 1 percent was marine mammals, 1 percent was birds and eggs, 6 percent was marine invertebrates, and 6 percent was vegetation. An insignificant amount of the non-salmon fish harvest was composed of groundfish (0.32 pounds per capita).

Anchorage is not described in terms of its residents' subsistence use patterns because Anchorage is defined as a "non-rural" community and thus its residents are not federally qualified subsistence users. It can be assumed that the average Anchorage resident takes few groundfish while sport fishing. Seward is not described in terms of its residents' subsistence use patterns because there is no available information. Until May 2000, Seward was also classified as a "non-rural" community. Seward's community pattern of subsistence resource use is probably very similar to Homer's.