

2016 Spiny Dogfish Advisory Panel (AP) Fishery Performance Report (FPR)

The Spiny Dogfish Advisory Panel (AP) (<http://www.mafmc.org/advisory-panels/>) met September 6, 2016 to develop the Fishery Performance Report (FPR) below. The meeting was conducted via internet webinar and facilitated by Jason Didden, the Mid-Atlantic Fishery Management Council's Dogfish Fishery Management Plan (FMP) coordinator. The advisors who participated were:

Bonnie Brady
James Sulikowski
Jan McDowell
Greg DiDomenico
Sonja Fordham

James Fletcher
Douglas Feeney
Claire Fitz-Gerald
Chris Hickman
Scott MacDonald

Additional participants included:

Max Appleman
Rob O'Reilly
John Whiteside
Wendy Gabriel
Fiona Hogan

William Whitmore
John Boreman
Ray Kane

The fishery performance report's primary purpose is to contextualize catch histories for the Scientific and Statistical Committee (SSC) because of the potential importance of this and related information for determining Acceptable Biological Catches (ABCs). The goal is to allow comparing and contrasting of the most recent year's conditions and fishery characteristics with previous years. First an overview of recent fishery data was provided by Jason Didden, and then trigger questions were posed to the AP to generate discussion. The trigger questions were:

- *What factors have influenced recent catch?
 - Markets/economy? – Environment?
 - Fishery regulations? – Other factors?
- *Are the current fishery regulations appropriate? How could they be improved?
 - Gear regulations and exemptions? -Trip Limits? -Others?
- *Where should the Council and Commission focus their research priorities?
- *What else is important for the Council and Commission to know?
- *Are there any recent major changes in this fishery?

The input from the AP begins on the following page. The information in this FPR does not represent a consensus, but rather a summary of the perspectives and ideas that were raised at the meeting.

General

- Quality is critical for maintaining price and the existing market. Large trips may have trouble maintaining product quality.
- The regional differences in the fishery mean that any changes (e.g. trip limits) have the potential to differentially impact different areas.
- Flooding processors with lots of spiny dogfish will harm the market. The fishery appears stable. See what happens with new rules (higher trip limits and rules allowing dual-targeting of monkfish and dogfish).
 - o A contrary, minority perspective was also voiced: Developing new markets (Asia/Africa) will require lower, not higher prices, and manipulating price (by limiting catch) to address small boat concerns hinders the possibility of greater overseas markets.

Factors Influencing Catch

- Markets are crucial to getting prices high enough to stimulate fishing activity. Low catches relative to the quota in recent years are due to low prices/effort. Some European markets constraints have been mitigated, others persist.
- There may be some spiny dogfish landings in Europe in the near future related to retention rules, which may impact demand for imports.
- Abundance does not currently drive catches; boats have no problem obtaining their trip limits.
- There are relatively few boats willing to go out for dogfish at current prices, but a small price increase could change that (see Cape Cod info below)
- European markets are shifting away from sharks, limiting US dogfish exports to Europe.
 - o The Shark Alliance did not promote European boycotts of US spiny dogfish/other legally caught sharks (though other entities seek/have sought to do this).
 - o Europe seems to have the U.S. figured out in terms of pricing, while traditional European demand may be declining due to changing tastes.
- General sentiment about sharks and shark fins have hurt the market and created barriers to shipping (about 19 container lines have adopted internal policies to not carry any shark products and there are bans in several states). There is interest in purchasing spiny dogfish internationally but ENGO opposition as well, despite MSC certification and the sustainability of the U.S. East Coast spiny dogfish fishery.
- Market & regulatory issues discourage new processors. The one New York processor closed after Hurricane Sandy – market issues discouraged their re-entry.
- The web of federal, state, and international rules (on fishing and sales) discourage entry into the processing sector generally. The Council processes, and favoring of small boats and a few processors, have exacerbated and perpetuate these issues.
- Virginia had mild winter and boats fished through the winter (including Jan & Feb), improving early 2016 landings.
- On Cape Cod:
 - o In 2013, the price for dogfish was extremely low (~10 cents/lb) and processors instituted forced days off.

- In 2014, the price was much better (upper 20s cents/lb) and there were no days off.
- 2015: 18-22 cents per pound; 2016: 20-24 cents, 30-34 cents if trucked to New Bedford. They have seen more vessels participating.
- It is not clear what exactly is driving these price changes, but they have a big impact on fishing/total catches.

Input on Regulations

- Some advisors would like to see a slow and steady approach that does not create large changes in catches and/or prices.
- Raising trip limits may collapse prices if additional markets are not developed.
- An occasional trip limit for trawlers (once or twice a month) around 30,000 pounds could help provide fish to any markets that develop.
 - A double limit once a week was raised as an alternative possibility
 - Regarding different kinds of trip limits, enforcement/monitoring needs to be ensured.
 - Some in Massachusetts are interested in a seasonal (October through December) trip limit increase that would not hurt smaller boats in the summer or crash the market. Discussions are considered preliminary, but may be in the 7,500 – 10,000 pound trip limit range.
 - There was concern that such adjustments could hurt more southern ports, and more details would be needed to evaluate.
- At least one advisor is interested in allowances to harvest male dogfish in excess of the typical trip limit and possibly a separate quota (which is currently made up of mostly female dogfish). A male only fishery would need an Amendment and/or benchmark assessment but recent research suggests it may be feasible. An advisor noted that males can be targeted currently.
- It would be useful to have a NE permit covering smooth dogfish to reduce regulatory burdens.

Research Priority Ideas

- Domestic and/or non-European markets.
 - Lack of southern processor(s) is an issue restricting southern landings.
- Separation of spiny and smooth dogfish in NOAA trade database (buyers in particular may want to know) and ground-truthing of this database by NOAA Fisheries/Council, etc. NOAA cannot separate spiny and smooth dogfish – this is a code by another international trade agency – a petition could be made but may not be successful given the relatively low value of dogfish.
- Longer term tracking of export trends. <https://www.st.nmfs.noaa.gov/commercial-fisheries/foreign-trade/applications/trade-by-product>

- Better tracking of dogfish used/sold as fertilizer.
- Investigate ways to increase the quality of meat (i.e. how can it be processed on deck, etc.), which in turn would increase the price of the product. There is no shortage of dogfish and if we can get the price higher I think this would have a snow ball effect on the market.
- New benchmark assessment needed including:
 - o Exploration of how spiny dogfish recovered so much faster than predicted (Could be useful for managing multiple other shark fisheries).
 - o Increased engagement with fishermen as part of scientific research.
 - o Better estimate of the population of male dogfish and availability of dogfish to the relevant surveys generally.
 - o Obtain reproductive and other biological information across the range of the species before the next assessment.
 - o Prioritize the biological information that needs updating before the next assessment.

Other Issues Raised

- There needs to be a clear division of male and female dogfish in terms of the assessment versus catch limits versus monitoring.
- Consider having NAFO manage the fishery outside the EEZ to facilitate the creation of a male-only fishery.
- There was a concern voiced over the process used to change the trip limit on the ASMFC side of things in terms of public notice – this was passed along to ASMFC staff.
- A name change for spiny dogfish (“chipfish” has been suggested in addition to “cape shark”) could help the market, and could allow access to a prison protein market (<http://www.wsj.com/articles/SB122290720439096481>).
- o Massachusetts advisers noted that “Cape Shark” is an approved market name (http://www.accessdata.fda.gov/scripts/fdcc/?set=seafoodlist&id=Squalus_acanthias&sort=SLSN&order=ASC&startrow=1&type=basic&search=dogfish)