

# Gloucester Municipal Harbor Plan Update

## HPC Meeting #10

### Economic Baseline and MHP Recommendations

July 28, 2022



# Agenda for Discussion

1. Desires and considerations for Harbor
2. Regulatory Plan vs Economic Development Plan
3. Economic Baseline Revisit
  - a. Recurring questions and concerns
  - b. Living Resources Capacity
4. Q&A Open Discussion

# Desires and Goals

- A. Leverage and increase commercial fishing and seafood processing activity
- B. Support and position local/current businesses to stay competitive
- C. Support more vessel activity by providing more dockage and berthing space
- D. Adapt infrastructure to meet the needs of evolving nature of catch
- E. Strengthen tourism by highlighting fishing heritage and industry
- F. Advance innovation in blue tech industry (outside of working harbor?)
- G. Clarify and streamline WDUZ and supporting use regulations to benefit business owners
- H. Identify point entity to lead, monitor, and implement vision of working waterfront development

# Key Questions and Considerations

## 1. SUPPORTING FISHING CAPACITY & COMPETITIVITY

- How can Gloucester fishing capture more value?
- What is the capacity of the harbor in terms of potential fishing activity?
  - How does Gloucester ensure that the Harbor can accommodate growth while supporting fishing related uses?
  - How much dockage space exists, and how is it being used?
- How can Gloucester maintain culture of independent private operators while creating stronger support infrastructure for those operators?

## 2. ADVANCING RELEVANT BLUE TECH & WIND OPPORTUNITIES

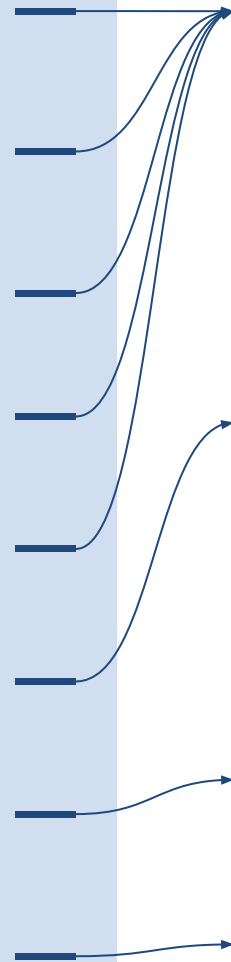
- What is taking place in the fishing industry specifically that Gloucester as a port and a fleet will need to adapt to?
  - How can Gloucester access the right technical expertise to assist with adaptation?
- How can Gloucester leverage and support Salem offshore wind development through servicing fleet, ship and boat repair services?

## 3. PURSUING SUPPORTIVE REGULATIONS

- Which of the regulatory hurdles create actual impediments to existing and new businesses on the harbor?

## 4. BUILDING ORGANIZATIONAL CAPACITY

- What knowledge, skill base, and organizational supports are needed to ensure the continued viability of the working waterfront?



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## Regulatory Plan vs. Economic Development

	DPA/Regulatory	Local Regulation	Economic Initiative	External Economic Factors
A	Create language that prioritizes fish and shellfish industry over other potential uses		Organizational and financial capacity issue; Promotional initiatives, entity to oversee and measure, Identify niche markets	Catch volumes/harvest levels, recruitment and supply unpredictability, risk & investment capital
B	Supporting use model, licensing future development proposals		Supporting appropriate diversification to help subsidize traditional businesses	
C		Capacity issue, site control, public - private mechanisms		
D				This will likely happen at an individual business scale or will be incentivized at a state or national level
E	Supporting use model, licensing future development proposals	I4C2 opportunity	Grants, funding, infrastructure improvements, partnerships	
F	I4C2 opportunity	I4C2 opportunity	Grants, funding, infrastructure improvements, partnerships	
G		Adjust local zoning to accommodate development flexibility/establish standards	Organizational capacity issue; point entity for property owners	
H			Grants, funding, infrastructure improvements, partnerships	

# Defining and Measuring Capacity of Gloucester Harbor

- What is the baseline capacity of the harbor?
- What is the delta between our allowance and our catch?

## Shoreside Capacity

can be known

proprietary

### Homeport

- Dockage (linear ft/boat size = # of boats) + tie-ups
- Dock water depth
- Accessibility and ownership

### Load/Unload

- # of locations
  - # of slips, slots, truck bays
- total SF of space
- Speed of unloading

### Processing

- Move/hold/process/store
  - cycle time
  - Processing Speed (product/line switching)
- Physical size
- Available time

## Vessel capacity

### Number of Boats

- Sizes of boats
- Types of Gear

### Crew Availability

### Number of Trips

## Catch Allowances

Biomass estimate

### National Marine Fisheries Service

- Sector (confidential)
- Common Pool

### MA State limits

### Known Limits

Trip or Vessel based X weight or number of fish

Key variable is how many boats?



# Shoreside Capacity: Homeport - Dockage



Table 5 Amount (linear feet) of dockage in Gloucester Inner Harbor by use category.

Total length of commercial dockage <sup>a</sup>	16,955 lf
Total length of recreational dockage	5,920 lf
Total length of other (government, shallow, transient, loading)	1,540 lf
Total length of dockage in the inner harbor	24,415 lf
Potential for expansion of dockage	2,960 lf
Existing and potential	27,375 lf
The total length of commercial fishing vessels at berths in the inner harbor <sup>b</sup>	9,754 lf

<sup>a</sup> The Gloucester Harbor Characterization, 2004 estimated commercial wharves and piers in the inner harbor at 13,195 linear feet. No methodology or source was cited.

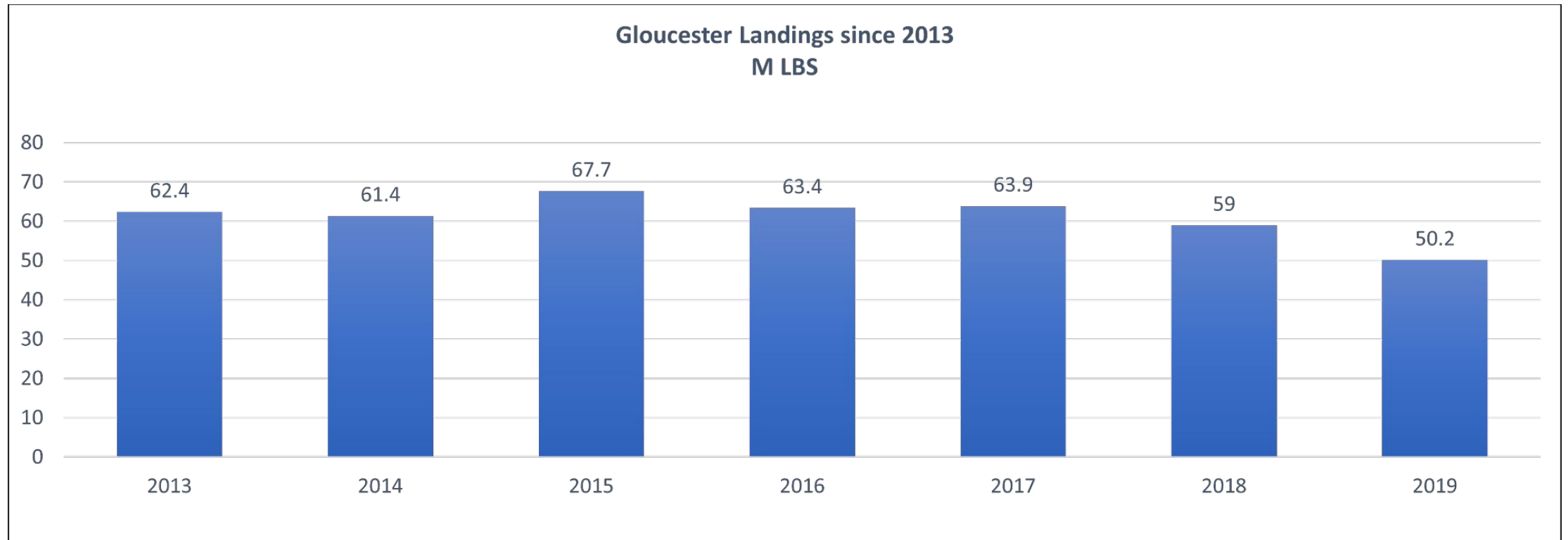
<sup>b</sup> There is no direct correlation between total dockage length and total vessel length as many vessels are not berthed broadside, but it is a useful number.

Source: 2014 Study of Dockage in Gloucester’s DPA

# Shoreside Capacity & Catch Allowance: Weight

**Things we do know about capacity - Gloucester has handled 143% more lbs over the dock than it does presently**

- Based on National Marine Fisheries Service (NMFS) data, Gloucester landings went from **122mlbs** in 2009, fluctuated in the **mid-60mlbs** range until 2017, then dropped to approximately **50mlbs** in 2019.

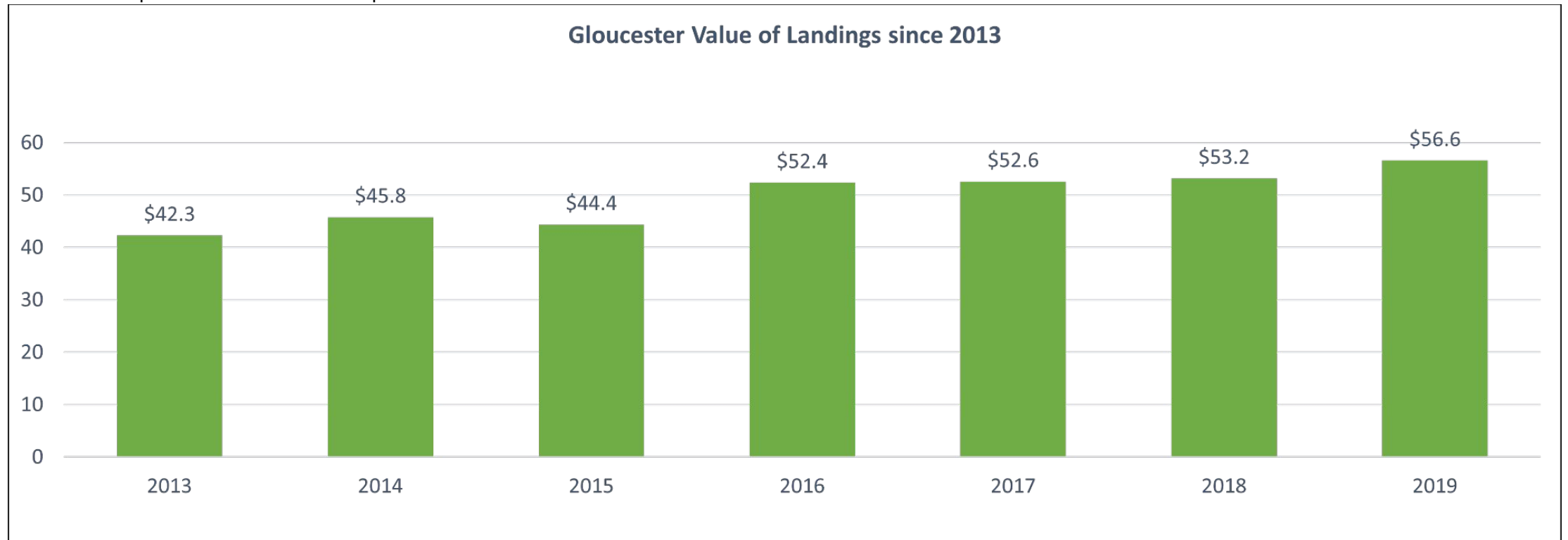


Source: NP analysis of National Marine Fisheries Service (NMFS) Landings data, various years

# Shoreside Capacity & Catch Allowance: Value

## It's moved from pounds to dollars

- Based on NMFS data Gloucester's catch value in 2019 was \$56.6m – the highest catch value since 2011 and \$6 million higher than 2009 when the total pounds caught was 143% higher
- This obviously reflects a change in species mix, which is also exemplified in the price per pound, which went from \$.41 in 2009 to \$1.13.



Source: NP analysis NMFS Landings data, various years



# Vessel Capacity

- Gloucester's fishing capacity and activity appears to be roughly equivalent to New Bedford.
- Capacity is measured by harvesters and vessels. Activity is measured by trips, harvesters and dealers.
- This data implies about Gloucester:
  - The largest fishing fleet
  - Most dealer activity
  - And a fleet that makes frequent trips (dayboat driven)
- In 2018 446 Vessels were homeported in Gloucester, compared to 425 in 2014.
  - However, according to the most recent Ports Compact Study in 2013, only 279 vessels were actually active in Gloucester.
  - More recent data related to active versus home ported vessels is currently unavailable.

2018	Gloucester	New Bedford	Boston
Permitted Harvesters	436	416	166
Homeported Vessels	446	329	123
Trips Landing	19,638	10,551	2,165
Active Permitted Harvesters Landing	607	720	146
Active Dealers Purchasing	87	81	21

Data Source: Mass Marine Commercial Fisheries Port Profile reports various ports; MA Permitting Database, SAFIS Dealer Database, 06/02/2020 & ACCSP Data Warehouse, 03/17/2020 TH

# Catch Allowances: NMFS Common Pool & MA State Limits

## MA State Limits

Species	Fishery	Season	Open Days	Size limit	Possession Limit
American eel (1)	All	1/1/ - 12/31	Sun - Sat	9 in.	no limit
Black sea bass (2)	All gears	1/1/ - 3/31	Sun - Sat	12 in.	100 lb.
	Weirs	4/1 - <a href="#">Quota</a>	Sun - Sat	12 in.	No trip limit. Annual catch capped at 24,000 lb.
	Trawl	4/23 - <a href="#">Quota</a>	Sun - Sat	12 in.	100 lb.
	Pots	7/1 - 9/14	Sun - Thu	12 in.	500 lb.
	Pots	9/15 - <a href="#">Quota</a>	Sun - Sat	12 in.	600 lb. if >15% of quota remains; otherwise 500 lb.
	Hook/Other	7/1 - 9/14	Sun - Thu	12 in.	250 lb.
	Hook/Other	9/15 - <a href="#">Quota</a>	Sun - Sat	12 in.	300 lb. if >15% of quota remains; otherwise 250 lb.
Bluefish	All	1/1 - <a href="#">Quota</a>	Sun - Sat	16 in.	5,000 lb.
Cod (3) (4)	Gulf of Maine	1/1/ - 12/31	Sun - Sat	19 in.	400 lb.
	Southern New England	1/1/ - 12/31	Sun - Sat	19 in.	1,000 lb.

Source:  
<https://www.mass.gov/service-details/commercial-finish-regulations>  
<https://www.mass.gov/service-details/commercial-lobster-crab-regulations>

## National Marine Fisheries Service Common Pool

### A Days-at-Sea, Handgear A, Small Vessel Category (Type C), and Handgear B

Species	Minimum Size	Stock Area <sup>1</sup>	A DAS	Handgear A	Small Vessel Category (Type C) <sup>2</sup>	Handgear B
Cod	19"	GOM	200 lb per DAS, up to 400 lb per trip	200 lb per trip	200 lb per trip	25 lb per trip
		OFF GB, IN GB, and SNE	100 lb per DAS, up to 200 lb per trip 500 lb per trip Closed Area II Yellowtail Flounder/Haddock SAP (for targeting haddock)	100 lb per trip	100 lb per trip	25 lb per trip
Haddock	16"	GOM	2,000 lb per DAS, up to 4,000 lb per trip	2,000 lb per trip	300 lb per trip	2,000 lb per trip
		OFF GB, IN GB, and SNE	100,000 lb per trip		300 lb per trip	100,000 lb per trip
Pollock	19"	All Areas	Unlimited			
Redfish	7"	All Areas	Unlimited			
White hake	none	All Areas	1,500 lb per trip			
Atlantic halibut	41"	All Areas	1 fish per trip			
Yellowtail flounder	12"	GOM, IN GB	1,000 lb per DAS up to 2,000 lb per trip	1,000 lb per trip	300 lb per trip	1,000 lb per trip
		SNE	100 lb per DAS, up to 200 lb per trip	100 lb per trip		

*NOTE: these are just sample screenshots of the full regulations dictating the catch allowances at the national and state level.*

Source:  
<https://www.fisheries.noaa.gov/new-england-mid-atlantic/commercial-fishing/northeast-multispecies-common-pool-fishery>

# Living Resources Capacity Opportunities

Regulatory and economic development initiatives can address these constraints:

- **PERMITS** (access to catch):  
took action to obtain community permits
- **DOCKAGE** (access to docks):  
this is not solved, using cross subsidy loophole  
--> entity to acquire and protect/control
- **PROCESSING** (access to market): co-op, etc.
- **WORKFORCE** (access to people):

*The market could solve all of these, but it is not financially attractive enough for the market to do this, so the public sector needs to step in to spearhead efforts in the opportunity areas*

- ### Biomass estimate

## Catch Allowances

Key variable is  
how many  
boats?

# Next Steps

1. Draft MHP
  - a. Economic Framework and Narrative
  - b. Draft Plan Recommendations
    - i. Sub-area goals & recommendations
    - ii. Site-specific goals & objectives (I4C2 & 112 Commercial)
  - c. Draft Plan Framework and Writing
2. Public Meeting #3 Prep - TBD



**- Thank You -**