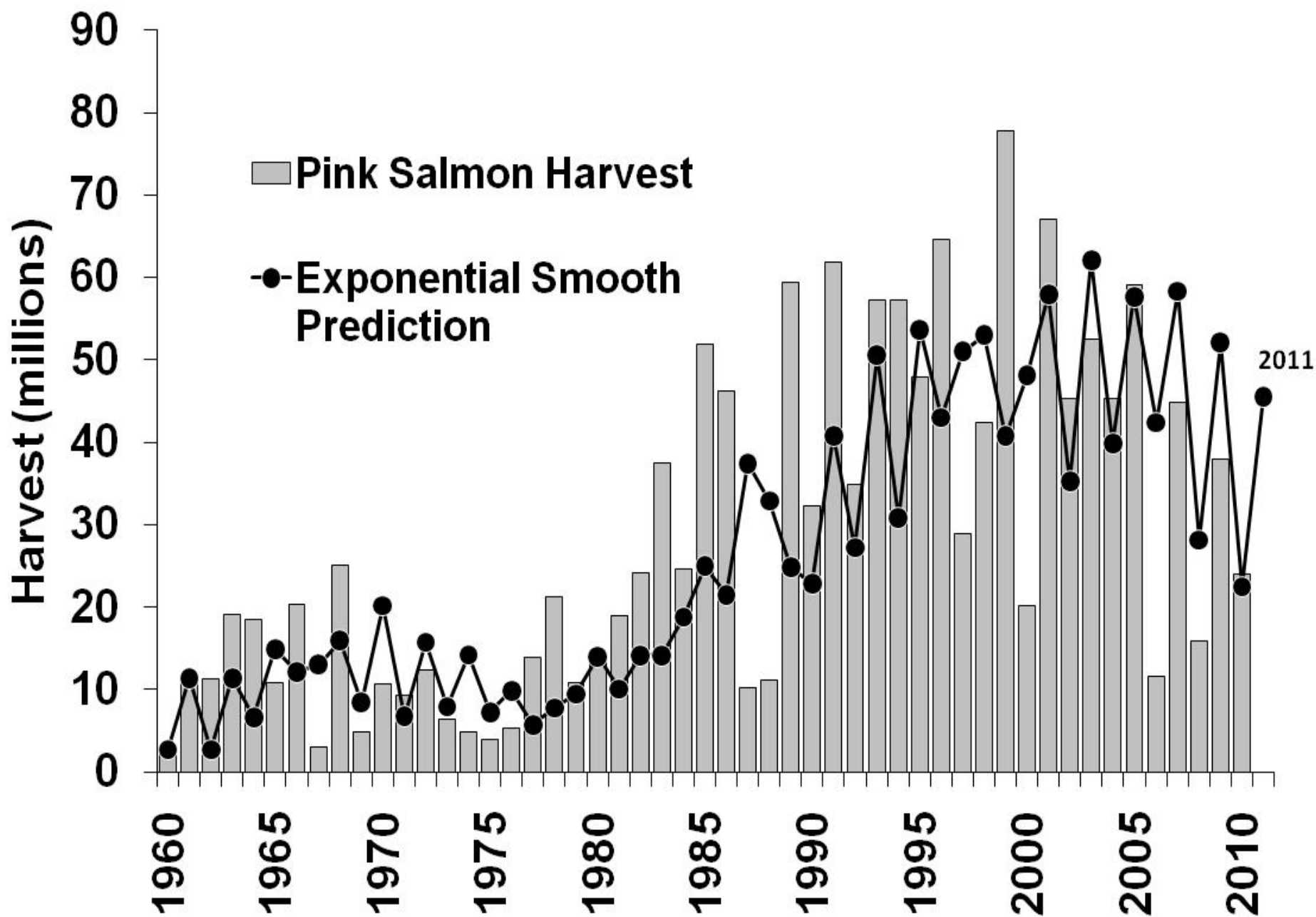
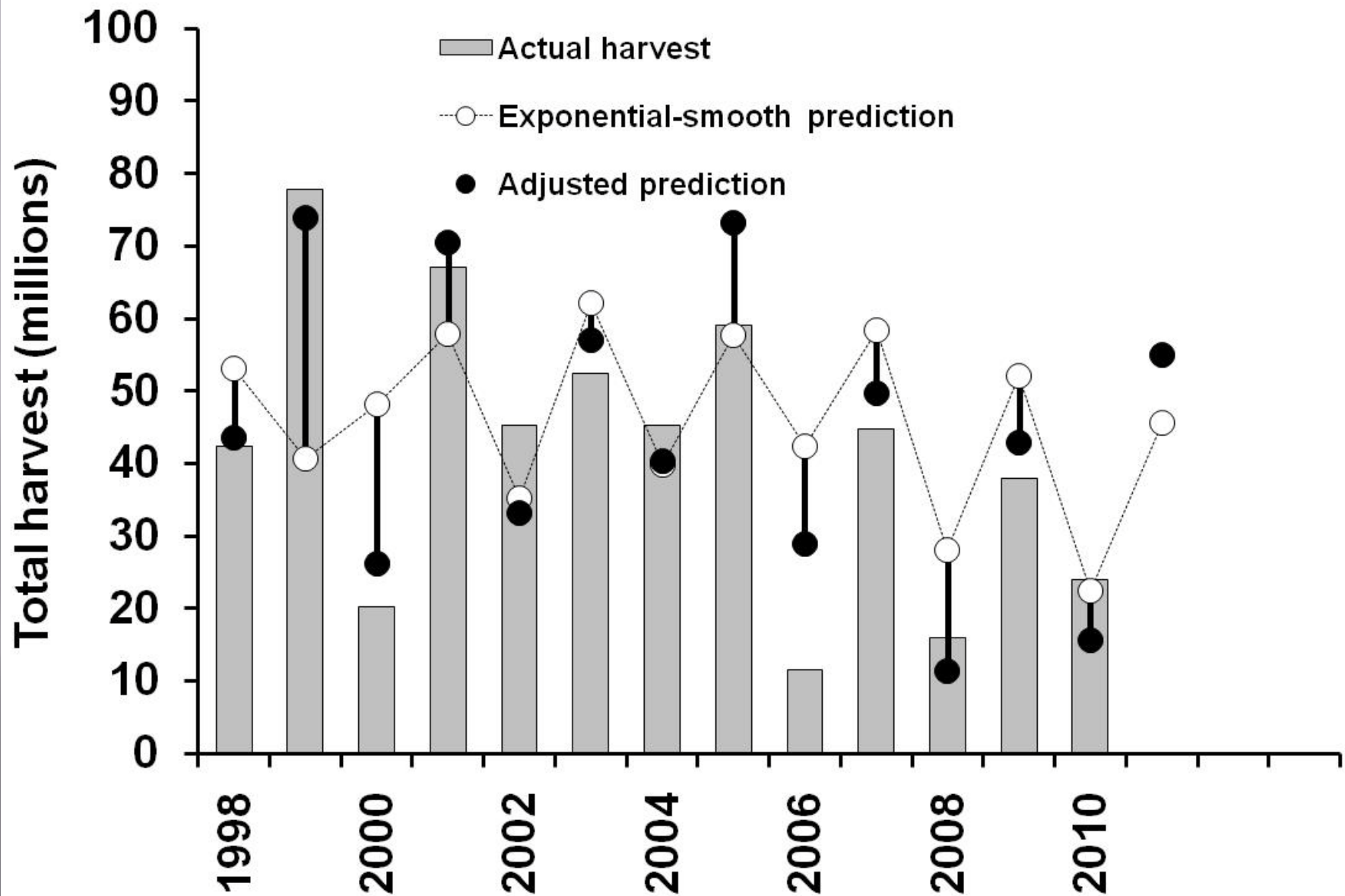


Southwest Alaska Pink Salmon Harvest Forecast



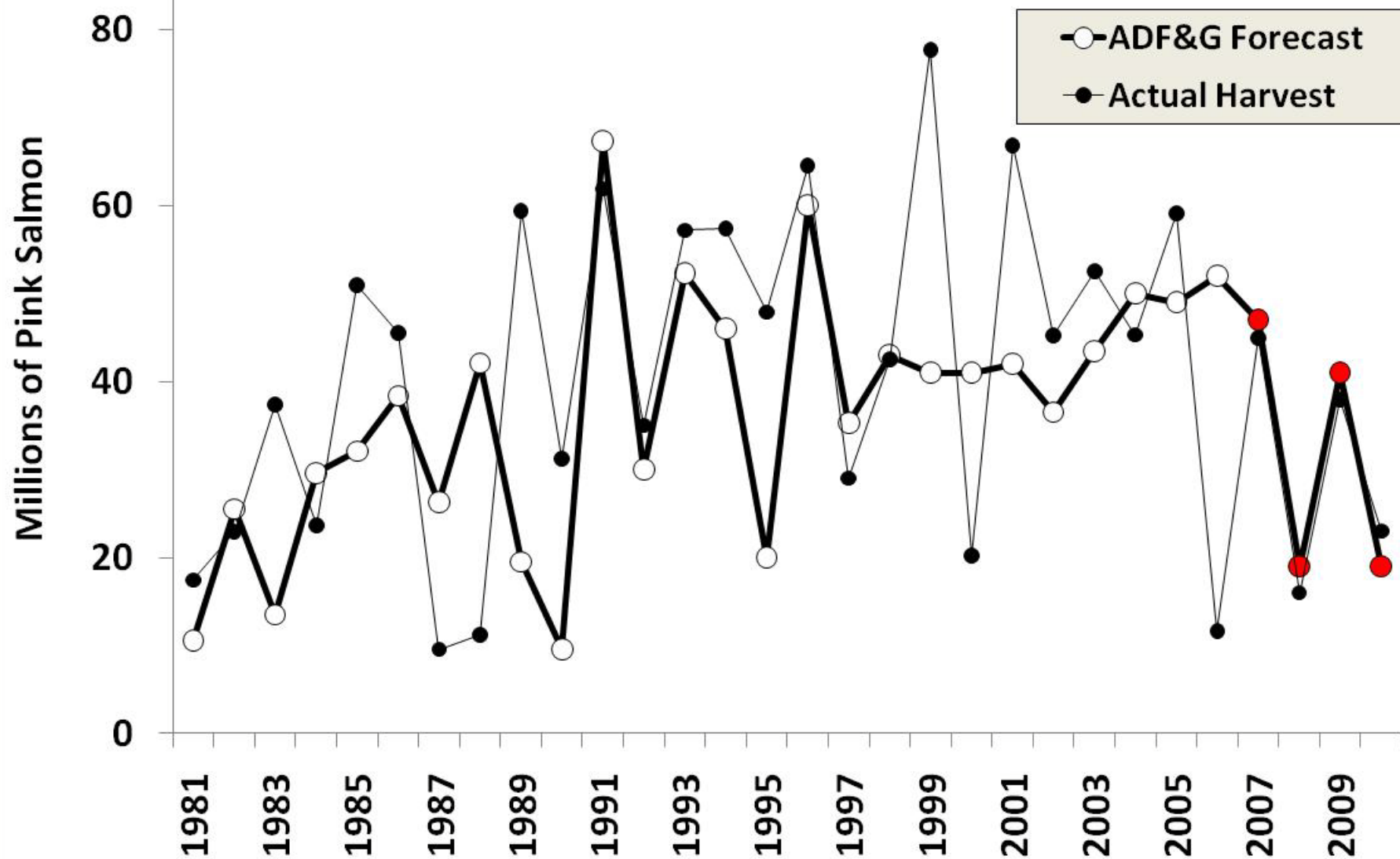


2011 Adjusted Prediction = 55 million



ADF&G Southeast Alaska Pink Salmon Harvest

Forecast vs. Actual Harvest, 1981-2010



2011 ADF&G Pink Salmon Harvest Forecast

55 Million

(80% CI Range: 43–67 Million)

NSRAA, DIPAC and SSRAA 2011 Forecasts

Species and Site	Common Property	Cost Recovery	Total Harvest
DIPAC chum/Taku	577,000		
DIPAC chum/Lynn Canal	651,000		
DIPAC Total Chum	1,228,000	1,678,000	2,906,000
NSRAA chum/Hidden Falls	865,000	200,000	1,650,000
NSRAA chum/Deep Inlet	800,000	200,000	1,000,000
NSRAA Total Chum	1,665,000	400,000	2,065,000
NSRAA Total Coho	135,300	140,610	275,910
SSRAA chum/Nakat	249,000	0	249,000
SSRAA chum/ Anita Bay	185,000	0	185,000
SSRAA chum/Kendrick	509,000	0	509,000
SSRAA chum/Neets Bay	533,000	800,000	1,333,000
SSRAA Total Chum	1,476,000	800,000	2,276,000
SSRAA Total Coho	370,000	60,000	430,000
Total Enhanced Chum	4,369,000	2,878,000	7,247,000
Total Enhanced Coho	505,000	200,610	705,610

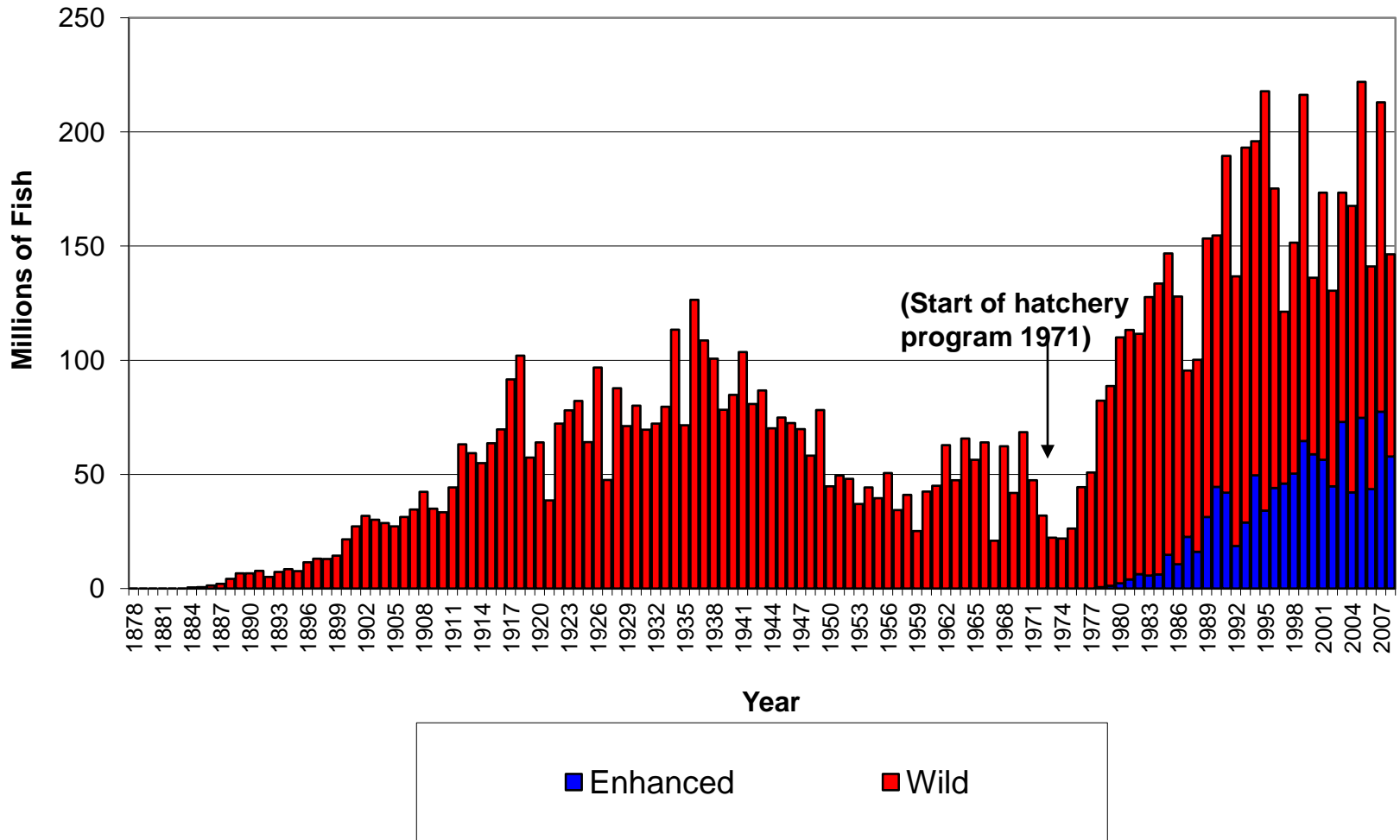
NSRAA, DIPAC and SSRAA Chum Salmon Production Increase in 2011

Site	Current Release	2011 Increase in Eggs to Fry (2012)	2012 Total Release
DIPAC/Lynn Canal	58,000,000	0	58,000,000
DIPAC/Taku	37,000,000	0	37,000,000
NSRAA/Hidden Falls	81,000,000	10,000,000	91,000,000
NSRAA/Deep Inlet	60,000,000	0	60,000,000
SSRAA/Nakat	16,000,000	0	16,000,000
SSRAA/ Anita Bay	22,000,000	0	22,000,000
SSRAA/Kendrick	20,000,000	10,000,000	30,000,000
SSRAA/Neets Bay	69,000,000	12,000,000	81,000,000
Enhancement Total	363,000,000	32,000,000	395,000,000

Alaska Salmon Enhancement Challenges



Commercial Salmon Harvest



ECONOMIC IMPACT OF THE SOUTHERN SOUTHEAST REGIONAL AQUACULTURE ASSOCIATION

Prepared for:
SSRAA

Prepared by:
McDowell Group, Inc.
September 2008



Neets Bay Hatchery, 40 Air Miles From Ketchikan





Remote Rearing



Neets Bay Barrier Seine



Cost Recovery Seine in Neets Bay



Tender at Lucky Buck



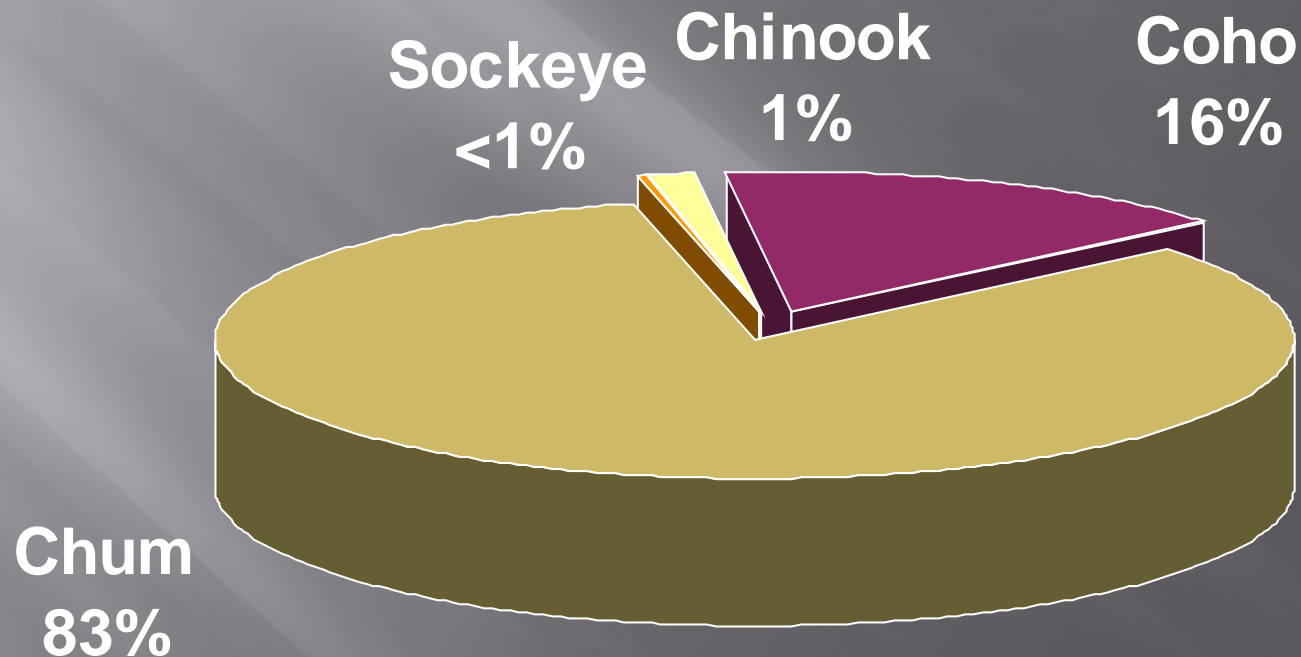
COMMERCIAL HARVEST

Chum Trollers in Neets Bay



Average SSRAA Salmon Production by Species, 2001-2007

(Based on Number of Fish)



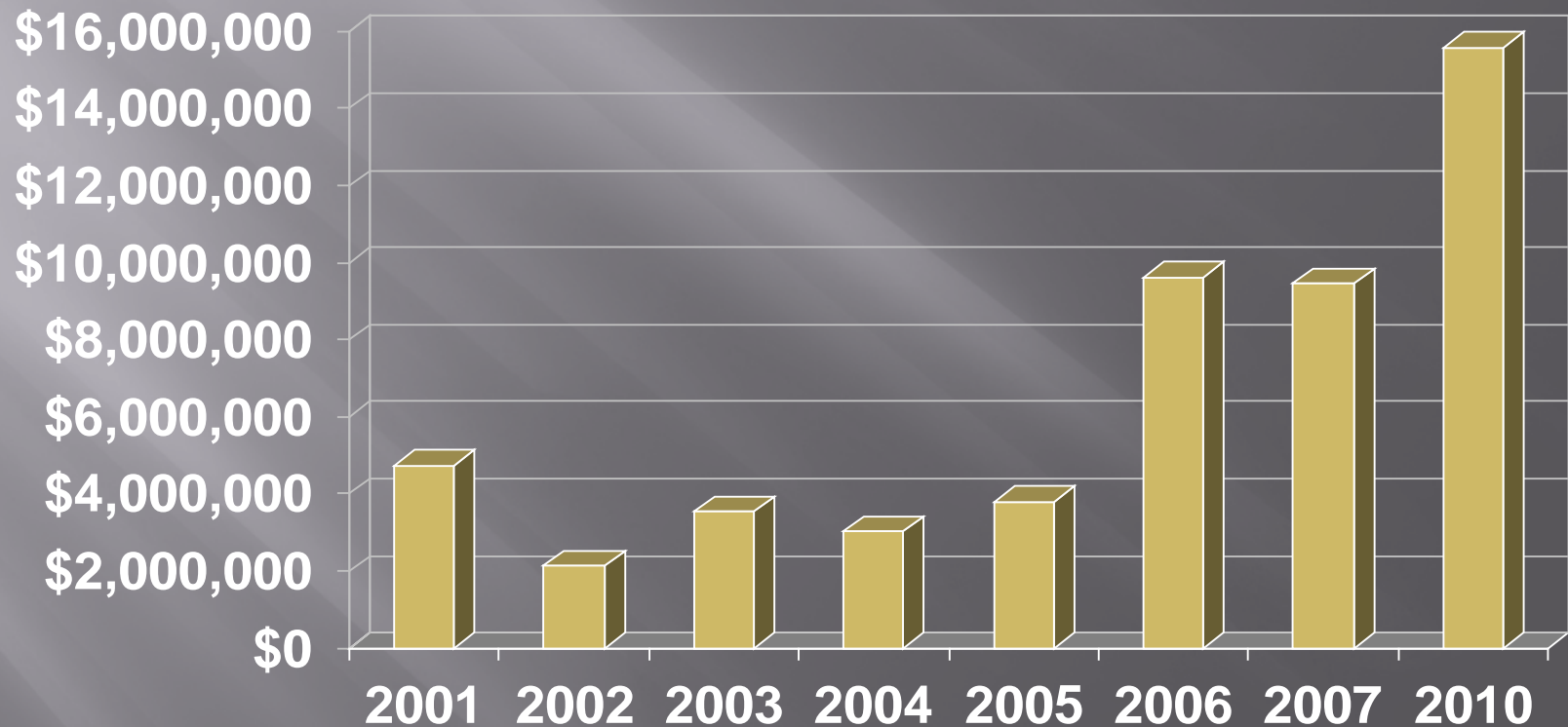
Southern Southeast Alaska Salmon Market

SSRAA production provides opportunities to participate in the region's strongest salmon market growth segment: **chum salmon**

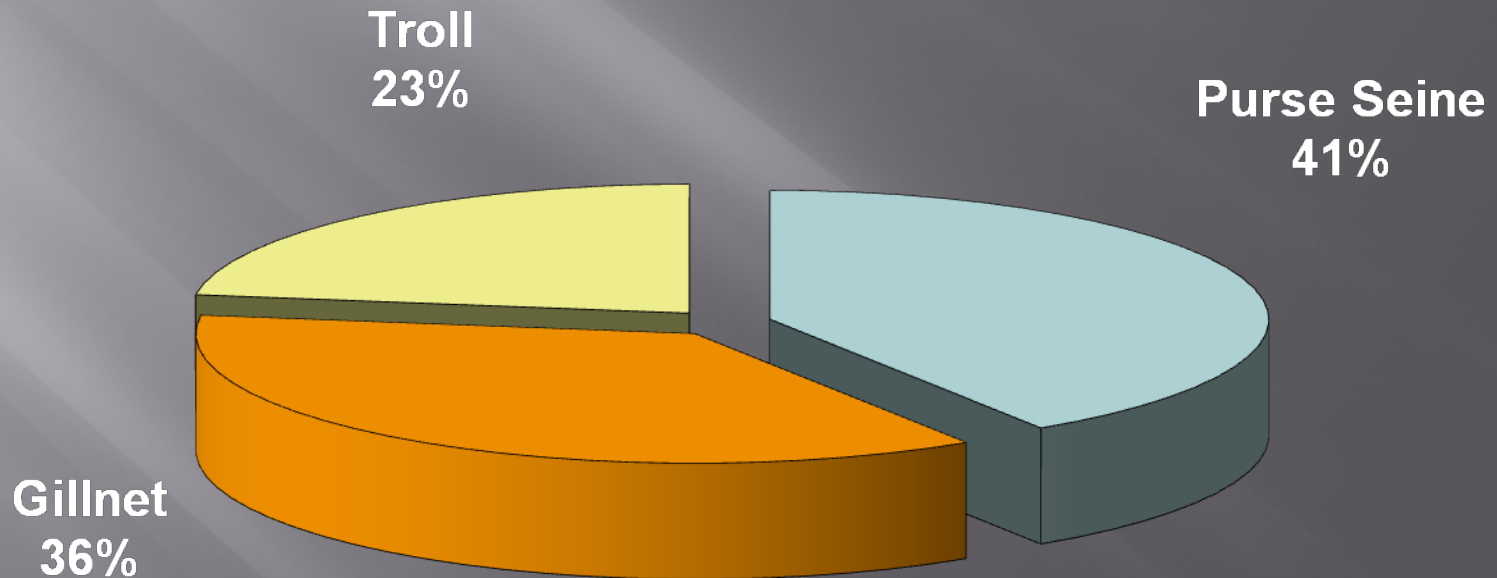
	SE Average Ex-Vessel (\$/lb.)	Frozen H&G Wholesale (\$/lb.)	Chum Roe Wholesale (\$/lb.)
2003	\$0.22	\$0.45	\$6.57
2007	\$0.39	\$0.92	\$7.87
2008	\$0.60	\$1.04	\$11.72
2010	\$0.71 (plus)	\$1.60 (plus)	?

Total Ex-Vessel Value of SSRAA Salmon Harvest, 2001-2007

2007: \$9.5 million – 2010: \$16.6 million



Average % of Commercial Ex-Vessel Value of SSRAA Salmon by Gear Type, 2001-2007

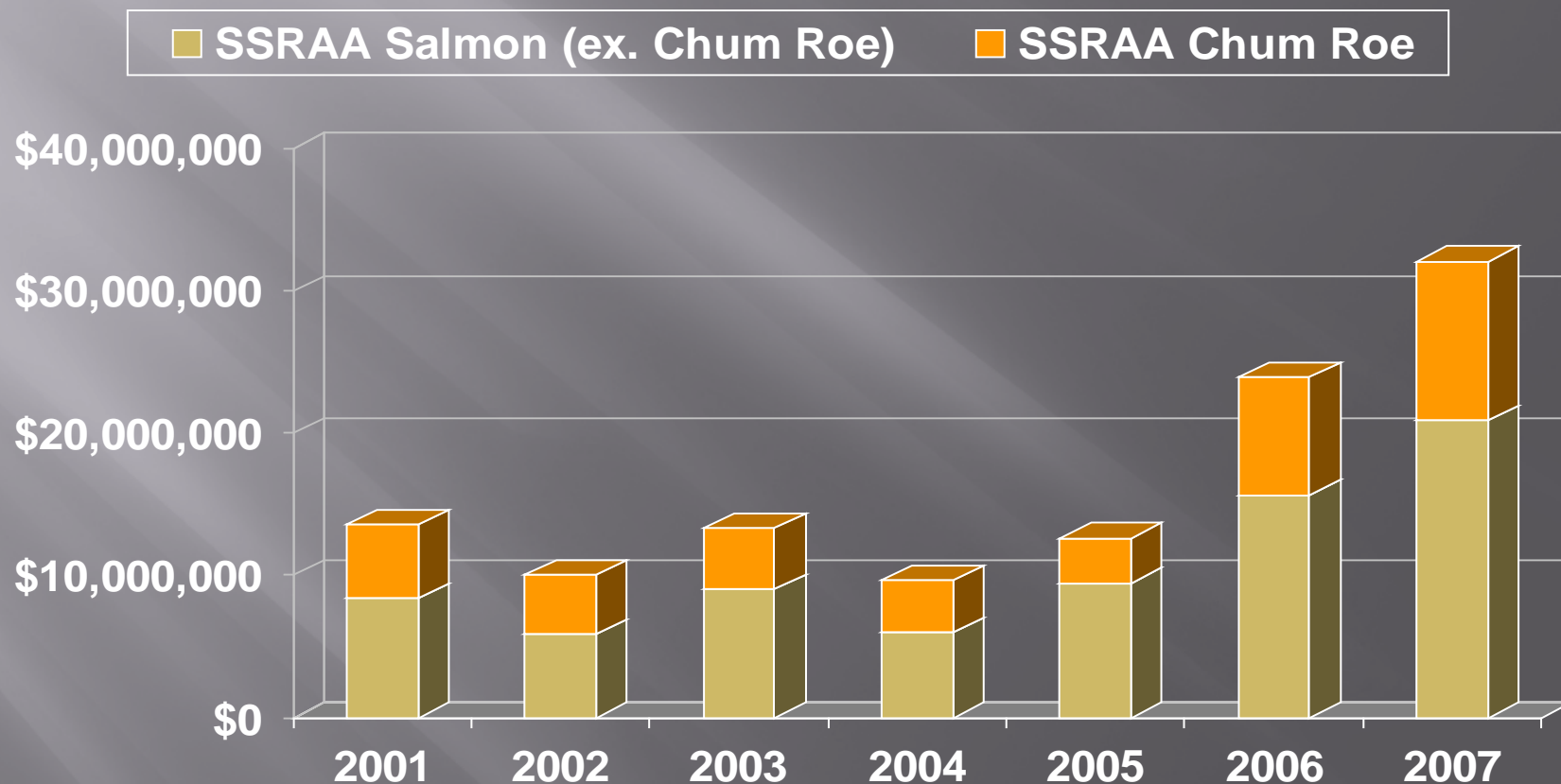


Geographic Distribution of SSRAA Ex-Vessel Value, 2007

Permit Holder Residence	Ex-Vessel Value	% of Total
Wrangell-Petersburg	\$2,646,000	28%
Ketchikan Gateway	\$1,534,000	16%
POW-Outer Ketchikan	\$1,389,000	15%
Sitka	\$205,000	2%
Juneau	\$74,000	1%
Kenai Peninsula	\$48,000	1%
Anchorage	\$44,000	<1%
Other Alaska	\$77,000	1%
Total Alaska	\$6,016,000	64%
Outside Alaska	\$3,454,000	36%

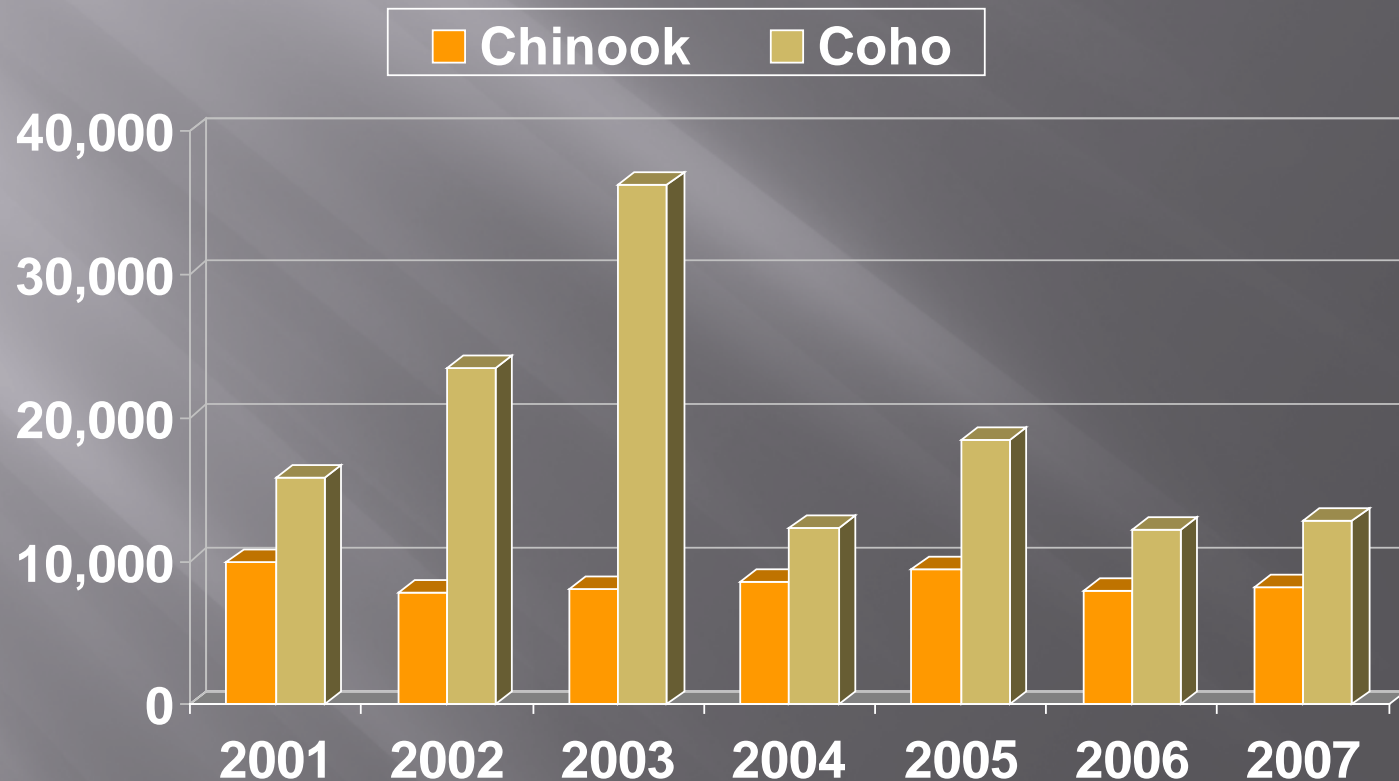
First Wholesale Value of SSRAA Salmon with Chum Roe Shown Separately, 2001-2007

2007: \$32.1 million (total)



Total Number of SSRAA Salmon Harvested in Sport Fisheries, 2001-2007

2007: chinook 8,200 coho 12,800



ECONOMIC IMPACTS OF SSRAA

SSRAA Economic Impacts, 2007

Ex-Vessel Value of SSRAA Salmon	
Ex-vessel value of SSRAA salmon	\$9.5 million
... harvested by Alaska residents	\$6.0 million
... harvested by So. Southeast Alaska residents	\$5.5 million
... harvested by Ketchikan residents	\$1.5 million
SSRAA salmon as % of So. Southeast total harvest <i>value</i>	31%

SSRAA Economic Impacts, 2007 *(cont.)*

Wholesale Value of SSRAA Salmon

First wholesale value of SSRAA salmon	\$32.1 million
...processed in Ketchikan	\$18.1 million
...processed in Ketchikan as % of total	56%

SSRAA Economic Impacts, 2007 *(cont.)*

SSRAA Employment, Payroll and Spending	
SSRAA annual average employment	38
SSRAA total annual payroll	\$1.7 million
SSRAA total annual spending	\$8.1 million
... in So. Southeast Alaska	\$3.8 million
... in Ketchikan	\$3.2 million

SSRAA Impact Summary, 2007 *(cont.)*

Direct and Indirect Impacts Generated by...	Annual Equiv. Jobs	Associated Payroll	Total Econ. Value
Commercial harvest of SSRAA salmon by SE Alaska fishermen	110	\$3.6 million	\$7.8 million
Seafood processing of all SSRAA salmon (excluding ex-vessel value)	215	\$4.9 million	\$30.4 million
Non-resident sport harvest of SSRAA salmon	45	\$1.0 million	\$3.2 million
SSRAA operations	50	\$1.9 million	\$5.0 million
All SSRAA activity	420	\$11.5 million	\$46.4 million
All SSRAA activity in Ketchikan	220	\$6.0 million	\$25.9 million

Total Direct, Indirect, and Induced Economic Impacts of NSRAA, DIPAC and SSRAA in 2008

Industry	Economic Output	Employment	Income
Commercial Fishing	\$61,000,000	468	\$36,600,000
Seafood Processing	\$139,300,000	545	\$15,000,000
Hatchery Operations	\$32,400,000	179	\$7,100,000
Total	\$232,700,000	1,192	\$58,700,000

2010 EX-VESSEL VALUE OF DIPAC, NSRAA AND SSRAA PRODUCTION

		Gillnet	Seine	Troll	Total
DIPAC	Chinook	\$23,095	\$8,486		\$31,581
	Sockeye	\$242,572			\$242,572
	Coho	\$36,427		\$70,963	\$107,391
	Chum	\$6,816,017	\$17,972	\$230,087	\$7,064,076
DIPAC Total	Total	\$7,118,111	\$26,458	\$230,087	\$7,445,620
NSRAA	Chinook	\$189,226	\$242,903	\$511,976	\$944,105
	Sockeye	\$0	\$0	\$0	\$0
	Coho	\$12,476	\$24,239	\$771,734	\$808,449
	Chum	\$1,457,416	\$7,808,454	\$686,462	\$9,952,332
NSRAA Total	Total	\$1,659,118	\$8,075,596	\$1,970,172	\$11,704,886
SSRAA	Chinook	\$356,200	\$374,614	\$779,400	\$1,510,214
	Sockeye	\$125,700	\$0	\$0	\$125,700
	Coho	\$1,495,000	\$191,500	\$1,789,300	\$3,475,800
	Chum	\$3,564,200	\$6,027,214	\$1,371,100	\$10,396,400
SSRAA Total	Total	\$5,541,100	\$6,027,214	\$3,939,800	\$15,508,114
Grand Total	2011 Total	\$14,318,329	\$14,129,241	\$6,140,059	\$34,587,629