



**Atlantic States
Marine Fisheries**
COMMISSION

Spiny Dogfish Conservation Equivalency of Weekly Trip Limits

August 5, 2026

- Current trip limit of 7,500 pounds per day
- Proposed: 37,500 pounds per week from September 1-December 31, 2026
- Revert to daily limit if 80% of NR quota utilized
- Conditional upon federal Exempted Fishing Permit under review
 - 50 vessel maximum
 - 4 trips per week

- Overall, the responses were supportive, with a few minor concerns noted. The primary issues were dockside monitoring of trip limits and clear notification of any in-season program changes.
 - From an enforcement perspective, monitoring actual offloads across an entire week to establish an overage case would be extremely difficult.
 - Increased burden on shoreside monitoring

1. Are there discard concerns with large batches of landings to processor?
2. Is the system manageable for quota monitoring?
3. Are there biological concerns?



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Questions?

Social and Economic Information Assessment of the U.S. Spiny Dogfish Commercial Fishery

Prepared for: ASMFC Spiny Dogfish Management Board

Prepared by: Tara Scott

Charge

Investigate available social and economic information on the U.S. Atlantic spiny dogfish commercial fishery to assess the impacts associated with low quotas and potential adjustments to trip limits.

Approach

Review relevant existing literature and draft a memo interpreting research that includes a snapshot using existing data (2019–2024) to help guide future policy and research.

Markets

Domestic Market

Primary Uses: Bait, fertilizer, biomedical.

Consumer Demand: Minimal interest in food-grade products.

Foreign Market (EU & UK)

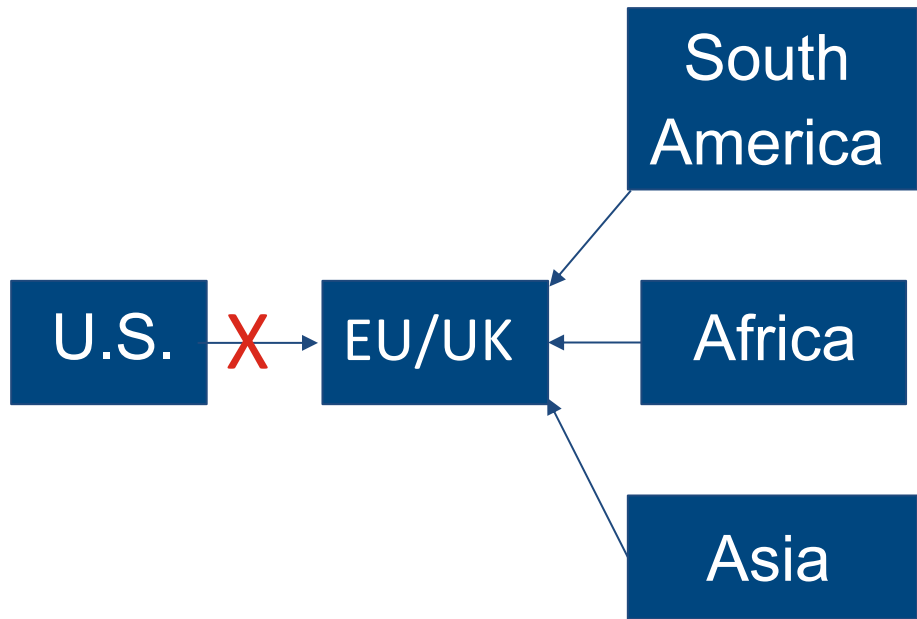
Primary Uses: Direct whitefish substitute.

Consumer Demand: High (e.g., traditional fish & chips, smoked belly flaps).

Relevant Literature

- Dell'Apa, A., Bangley, C. W., & Rulifson, R. A. (2014). Who let the dogfish out? A review of management and socio-economic aspects of spiny dogfish fisheries. *Reviews in Fish Biology and Fisheries*. 25(2): 273–295
- Dell'Apa, A., J. Johnson, D. Kimmel., R. Rulifson. 2013. The international trade and fishery management of spiny dogfish: A social network analysis. *Ocean and Coastal Management*. 80: 65-72
- Wiersma, J., & Carroll, M. 2018. An Economic Analysis of Spiny Dogfish: Historical Trends, Future Markets, and Implications for Management Action. Massachusetts Division of Marine Fisheries, Seafood Marketing Program. 16 pages

Findings: Global Flow and Market Leverage (Dell'Apa et al., 2013)



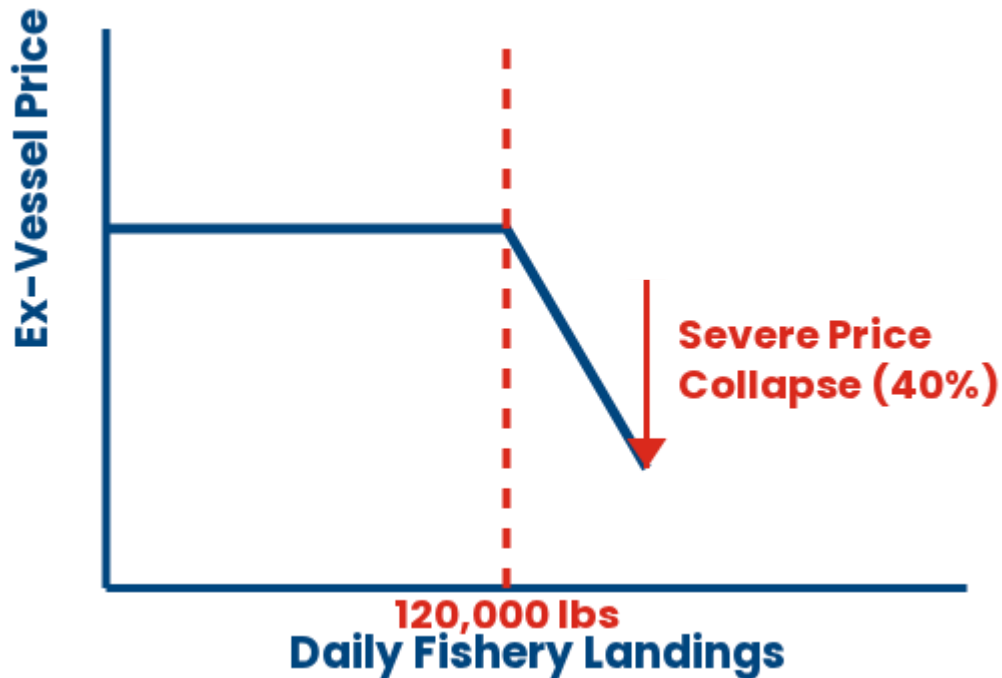
- The EU and UK hold significant market leverage.
- When U.S. exports are **restricted**, global trade networks rapidly adapt, sourcing substitute product from South America, Africa, and Asia.
- Strict international trade regulations historically protected U.S. market value from unregulated global stocks.

Findings: Operational Bottleneck (Dell'Apa et al., 2014)

- Management succeeded biologically but lost crucial processing capacity and market share. Quota increases are ineffective due to lost operational capacity.
- Strict biological limitation (within 48 hours) dictates that daily landings cannot exceed the daily throughput capacity of remaining processors.
- Fishers must land high volumes to remain profitable. Adjusting quotas or trip limits without considering processing capacity and market demand leads to significant inefficiencies.

Findings: The Processing Capacity Cap (Wiersma & Carroll, 2018)

Ex-Vessel Price Response to Processing Threshold



- **Core Dynamic:** The U.S. provides >90% of global supply, domestic bottleneck
- **The Threshold:** Processing capacity is capped at approximately **120,000 pounds per day**.
- **The Consequence:** Exceeding this threshold causes severe processor inventory gluts. In 2011 and 2016, oversupply triggered massive market price corrections, resulting in **40% drops in ex-vessel prices**.

Snapshot (2019–2024): Fishery Contraction

Total Commercial Landings

2019: 17.4 M lbs.



2024: **8.4 M lbs.**

51.6%
Reduction

Active Vessels

2019: 248
Vessels



2024: **142**
Vessels

42.7%
Reduction

Active Dealers

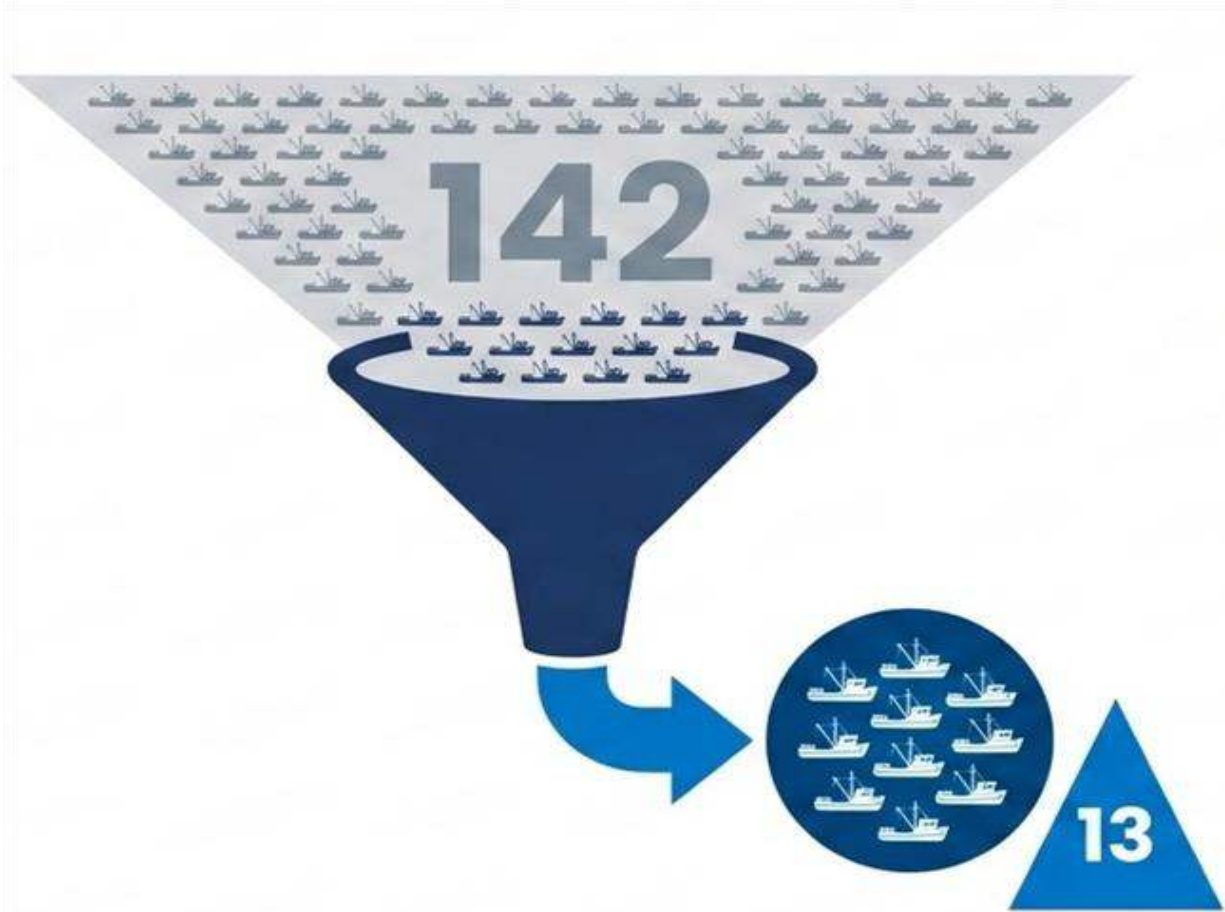
2019: 58
Dealers



2024: **39**
Dealers

32.7%
Reduction

Fleet Dynamics: Concentration of Effort



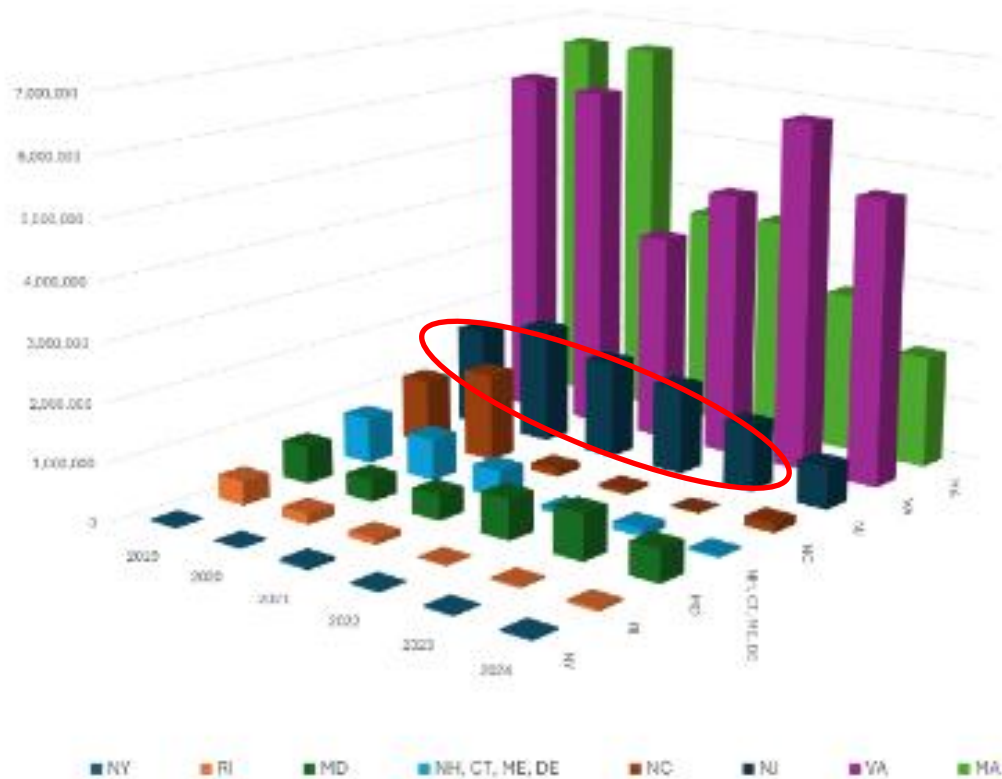
Catch Concentration

In 2024, just **13 vessels** accounted for **50%** of all total commercial landings (down from 22 vessels in 2019).

Gear Dominance

Gillnets remain the primary gear type, accounting for an average of **77%** of catch over the 5-year period, peaking at **88%** in 2024.

Geographic Shifts: Decline of Southern Landings



Source: ACCSP

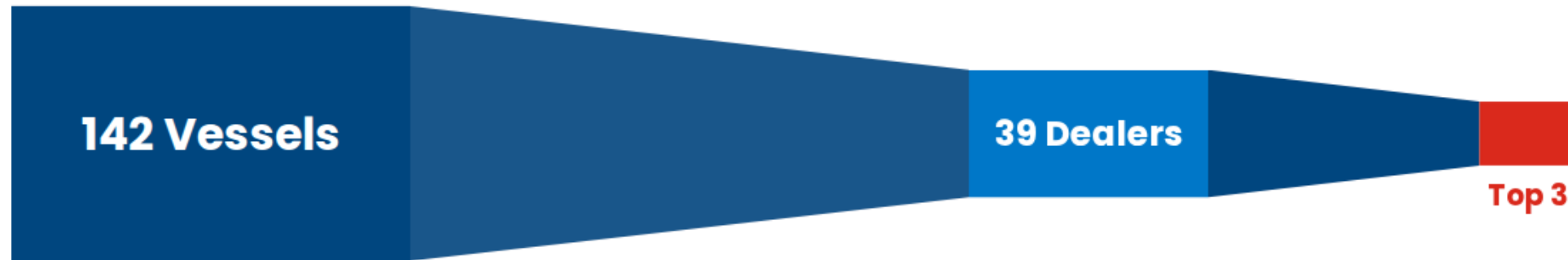
Hub

Landings remain heavily centralized in Virginia, Maryland, New Jersey, and Massachusetts.

Anomaly

North Carolina, historically a major participant, experienced a substantial drop in landings over the time series.

Processing Sector Consolidation: Limited Buyers Risk



The Funnel:

Almost a third of dealers have exited the market since 2019. Today, the top 3 dealers process **67%** of all landings.

Infrastructure Deficit:

There are very few remaining processors, primarily relying on a single large-scale processor in the Northern Region.

Market Impact:

This centralization places the market at risk of monopsony. Buyers impose informal daily/weekly catch limits to protect processing capacity (e.g., labor and freezer storage).

Limitations and Caveats: A Shifting Baseline

Historical assumptions regarding U.S. supply and global demand must be applied with caution due to recent shocks.

Pre-2019 (2010-2018)

Higher Quotas (between 15-50.6 M lbs.).

Stable logistics.

Fluid EU/UK trade.

Post-2019

Addendum VI/VII, substantial quota reductions (2023-2025), and 2024 Atlantic sturgeon bycatch measures.

COVID-19 disruptions, shipping bans on shark products.

Brexit trade friction and stricter EU sustainability standards (e.g., high MSC certification costs).

Final Notes: Mitigating the Bottleneck

Current State:

While quotas are currently far below global oversupply levels, the significant loss of processing infrastructure means bottlenecks can still trigger market corrections during peak landings. Prices are stable (\$0.20–\$0.22/lb.) but declining against inflation.

Policy Consideration:

Increase flexibility via daily or weekly landing aggregates considering processing thresholds.

Potential Benefit:

Facilitate necessary volume to offset rising overland transit expenditures (e.g., fuel) and aid remaining processors in coordinating offloads.

Future Research Needs

- Harvest Sector Socioeconomics

Vessel expense (e.g., fuel and transport fees), crew demographics, and fleet's revenue dependency on the resource



- Processing Infrastructure

Define current daily throughput capacities

- Predictive Modeling

Incorporate production thresholds and market substitutes

- Market Power Analysis

Investigate buyer influence on ex-vessel price

- Limit Optimization

Cost-benefit analysis of daily vs. weekly limits

- Global Flow

Update review of export flow, shifting market demand, and alternate supply chains

- Incidental Catch/Ecosystem Analysis

Examine the economic impacts and ecological trade-offs resulting from spiny dogfish encounters with higher value fisheries (e.g., groundfish and lobster)