Southwest Alaska's Economic Linkages to the State and Beyond

Prepared for

Southwest Alaska Municipal Conference

May 2026

Northern Economics

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Please cite as: Northern Economics, Inc. *Southwest Alaska's Economic Linkages to the State and Beyond*. Prepared for The Southwest Alaska Municipal Conference. May 2026.

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Abbreviations

ADOLWD	Alaska Department of Labor and Workforce Development
AMHS	Alaska Marine Highway System
ARR	Alaska Road and Railbelt
ATIA	Alaska Travel Industry Association
SE	Southeast
SW	Southwest
SWAMC	Southwest Alaska Municipal Conference
WN	Western and Northern

Executive Summary

This report updates a 2016 report prepared for the Southwest Alaska Municipal Conference (SWAMC) that examined the economic geography of the Southwest region of Alaska. This report, like the prior study, provides a detailed examination of economic trends across the region as well as linkages to the rest of the state and the country, but updates the 2016 data and analyses using the most recent data available (2023 or 2024 in most cases) and examines what has changed since the last report.

Fisheries. While SW regional fisheries faced multiple stressors since the last report, the region remained among the highest volume and value in the nation, and continues to comprise a significant proportion of statewide fisheries activity and source of tax revenue. Since 2021, ex-vessel revenue dropped from $1.3 billion to $600 million in 2024, a 54% decline. In the same period, wholesale value from SW shorebased processors dropped 46% from $2.6 billion to 1.4 billion. Despite dropping to their lowest levels in 2024 ($20.7 million), shared fish taxes averaged $32.5 million between 2015 and 2024, of which SW regional communities accounted for 75% or $24.6 million.

Population. The SW region experienced the highest average population loss in the state since 2015 at 7%. The SWAMC regional population decreased from 29,769 people in 2010 to 27,643 in 2024, and is projected to decrease to 26,723 by 2035.

Income. As of 2023, per capita income for SW residents was $30,946, compared to $41,544 in Alaska as a whole. On average between 2014 and 2023, SW residents' per capita income rose the least of any AK region at 12.6%.

Employment. While the total number of jobs in the region has increased slightly from 13,480 to 14,987 since 2010, the number of jobs held by SW residents is estimated to have decreased to an average of 8,439 jobs between 2018 and 2022 compared with 10,166 between 2010 and 2014. The proportion of Alaskan resident jobs has also decreased from 2.1% to 1.9% across the same period.

Commuting. Commuting patterns have stayed consistent since 2014. In 2024, about 60 percent of workers in SW were not SW residents, and just over 6 percent of SW residents worked outside their region of residence. This net importation of workers suggests that SW offers ample employment opportunities to residents of the other regions of Alaska, as well as non-residents.

Trade flows. The total value of commodities and services exported from SW to the rest of the U.S. in 2022 amounted to about $2.8 billion, 82% of which was likely seafood products. However, between 2014 and 2022, the value of exports fell by $121 million to the rest of the U.S. and $41 million to the rest of the state. Imports from the rest of the U.S., increased in value by $276 million, while imports from other parts of Alaska declined by $200 million.

Economic output. There was a 2% decline in statewide economic output from $116 billion in 2014 to $114 billion in 2024, driven primarily by a decline in output from the oil and gas sector. SW's output decreased from $7.11 billion to $6.43 billion. Between 2014 and 2024, SW's seafood product and preparation sector increased its significant contribution to the statewide output at 69% compared to 63% in 2014.

Domestic waterborne commerce. SW domestic exports have increased slightly on average since the last report, both in terms of tonnage and as a share of all domestic exports from 1,479 to 1,664 tons and from 2% to 5% of domestic exports, comparing 2012–2013 to 2019–2023. The majority of exports continue to be composed of seafood products. Between 2019 and 2023 SW seafood products represented a larger share of all Alaska domestic exports of seafood products, increasing from 50% to 75%. Due to similar decreases in overall Alaska domestic imports, SW's share of imports has also increased, despite the weight of imports only increasing slightly (from 1,096 to 1,150 tons). The top domestic import to SW remains distillate fuel oil products, which now represents 40% of statewide domestic imports, an increase from 2012–2013 levels, at 33%.

International waterborne commerce. In terms of tonnage, Alaska's international waterborne exports were 19% greater than its imports annually on average from 2019 to 2023. Among the state's top exported commodity categories were seafood products and forest products, while petroleum products represented a large portion of imports. Additionally, SW's share of statewide international waterborne exports greatly exceeded its share of domestic exports (22.0% versus 5.0%). International seafood export volume has fluctuated from 2010 to 2023, peaking in 2017 at 918,000 tons. Total seafood export volume in 2023 was similar to 2012. The share of seafood exports going to China has fallen by 10.7%, while the share of seafood exports going to South Korea has increased by 10.1%. In recent years, of the largest source of international imports to SW by total tonnage originated from Japan (44.8%), driven by substantial fuel oils, lube oil and grease imports. Dutch Harbor remained the key port for international exports and imports in SW, which aligns with historical norms. Notably, while Kodiak historically was a key port for international forest products exports, over the past decade, international exports of forest products have declined, and as a result, Kodiak no longer plays a meaningful part in international trade by volume, however this does not include seafood products that are first shipped to Seattle but are bound for international markets.

Alaska Marine Highway System. While vessel schedules can vary year-to-year, utilization of the AMHS for transport both within SW and from SW to ARR has gradually declined since the early 2010s. Causes of this reduction in AMHS utilization included reduced operations as a result of budget constraints from 2015 to 2018, a union strike in 2019, and then pandemic impacts in 2020 and 2021. Interregional passenger and vehicle volumes, including cargo, in 2024 were about half of what they were in 2010. However, the volume of passengers transported on AMHS has declined steadily across the whole system beyond SW. Across the AMHS system, passenger volumes have declined by 42.4% and vehicle volumes have declined by 41.8% since 2010.

Air Passenger Travel. Passenger travel declined sharply in 2020 due to the COVID-19 pandemic in 2020, but since 2020, passenger air travel volume has gradually recovered, growing slightly each year. As of 2024, it is nearing 2017 levels but still has not rebounded to 2019 levels. Some of this reduction in passenger travel is likely associated with a decrease in the number of regional airlines serving the SW region.

Air Freight Volume. In recent years, there has been a major shift in air freight volumes from SW to other places. Since 2022, outbound annual freight volume has decreased by 54.1%, and freight volume to Anchorage has decreased by 58.6%. However, over the same period freight volume going to SW only declined by 14.3%, which is more similar to other year-to-year fluctuations.

Tourism. Southwest Alaska represents a modest but growing share of the state's visitor economy, accounting for roughly 5% of winter visitors, 3% of summer visitors, 7% of summer visitor nights, and about 6% of direct tourism spending in 2022–2023. Visitation to the region has increased over time, with summer visitor volumes rising from 58,000 in 2011 to nearly 88,000 in 2022. Visitors traveling with a guided group are the most common type of visitor to the SW region, but cruise activity is economically important to Kodiak and Dutch Harbor.

Conclusion. Southwest Alaska continues to play a vital role and contributes significantly to the state's economy, particularly in fisheries and seafood exports. However, challenges such as population decline, reduced resident employment, and lower economic output highlight the need for strategic planning to address these issues and support the region's growth.

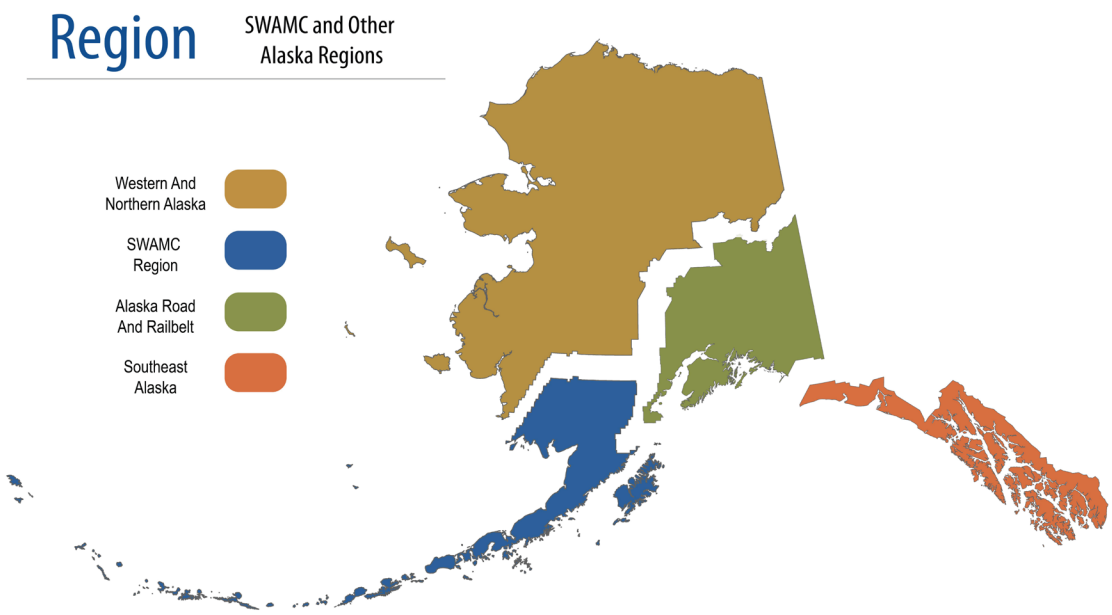
1 Introduction

In December of 2025, the Southwest Alaska Municipal Conference (SWAMC) contracted with Northern Economics, Inc., to update a report that examines the economic geography of Southwest Alaska. The last report, produced in 2016, focused on the years 2010–2014. It provided a detailed examination of economic trends across the region as well as linkages to the rest of the state and the country. This report focuses on data from 2016 forward to the most current data available (2023 or 2024 in most cases). It also analyzes and explores what has changed since the last report.

1.1 Geographic Overview

As in previous reports, to evaluate inter-regional trends we divide the state into four regions (Figure 1).

Figure 1. Alaska Regions



These regions are defined as follows:

1. **SWAMC Region (SWAMC; SW):** Dillingham Census Area, Bristol Bay Borough, Lake and Peninsula Borough, Aleutians East Borough, Aleutians West Census Area, and Kodiak Island Borough.

2. **Alaska Road and Railbelt (ARR):** Municipality of Anchorage, Matanuska-Susitna Borough, Kenai Peninsula Borough, Denali Borough, Fairbanks North Star Borough, Southeast Fairbanks Census Area, and Chugach Census Area and Copper River Census Area (formerly Valdez-Cordova Census Area).

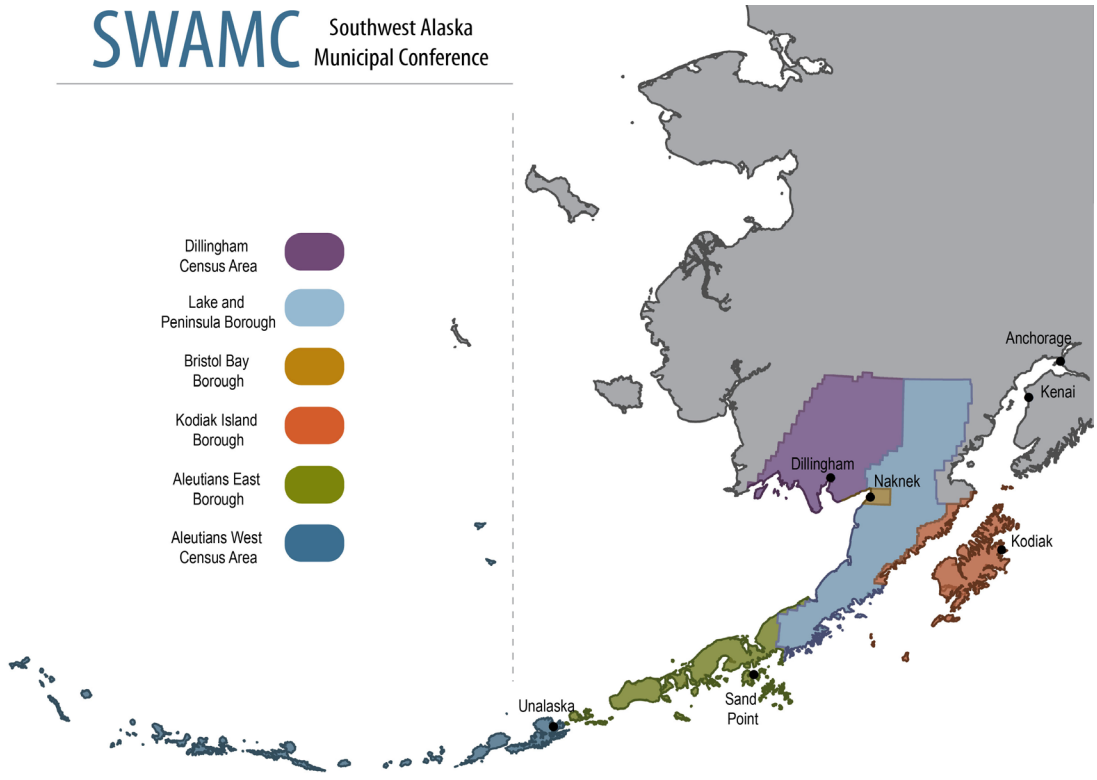
3. **Western & Northern Alaska (WN):** Bethel Census Area, Kusilvak Census Area (formerly Wade Hampton Census Area), Yukon-Koyukuk Census Area, Nome Census Area, North Slope Borough, and Northwest Arctic Borough.

4. **Southeast Alaska (SE):** Haines Borough, Hoonah-Angoon Census Area, City and Borough of Juneau, Ketchikan Gateway Borough, Petersburg Borough, Prince of Wales-Hyder Census Area, City and Borough of Sitka, Skagway Municipality, City and Borough of Wrangell, and the City and Borough of Yakutat.

This study devotes considerable attention to comparative economic measures across these four regions and economic linkages between them. Where applicable, this analysis also identifies economic flows to and from the remainder of the United States (termed "rest of the U.S.," as well as specific foreign countries.

As noted above, four boroughs and two census areas constitute SW Alaska. The geographic boundaries of these six areas are shown in Figure 2.

Figure 2. SWAMC Region



1.2 How this Report is Organized

The remainder of this report is divided into ten additional sections.

Section 2 provides a summary of the study's major findings, with a focus on the changes since the 2016 report.

Sections 3 through 9 provide greater detail and discussion of the major areas of research:

- SW Commercial Fisheries
- Demographics and Interregional Movements
- Trade Flows and Economics Output
- Waterborne Commerce
- Alaska Marine Highway
- Air Transport
- Tourism

Section 10 describes the study's conclusions

Section 11 references, lists all sources cited in the document

2 Summary of Findings

This report examines the economic geography of Southwest (SW) Alaska. It is the latest in a series of reports evaluating economic outcomes within and across regions of the state and focuses on changes since the last report, which examined a five-year period between 2010 and 2014. Results are divided into 8 main sections, covering fisheries, population and migration, income and employment, trade flows and economic output, transportation and trade, and tourism. This summary provides an overview of major results in each section followed by conclusions.

2.1 Changes in Alaska and SW Regional Fisheries

Because the fisheries sector is the primary economic driver of the SW region, trends in this sector may have a strong bearing on the other economic outcomes discussed throughout this report. The importance of SW fisheries is illustrated by simply looking at the top U.S. fisheries ports measured by harvest weight and value of landings (Table 1). In 2024, Four of the top ten ports in the country, by both weight and value of commercial seafood landings, are in SW Alaska.[1]

Table 1. Top Alaska Ports by Value and Weight and US Rank 2024

Port	Landed Value ($ Million)	U.S. Rank	Weight (Million pounds)	U.S. Rank
Dutch Harbor	$200.8	2	784	1
Kodiak	$76.4	9	214.3	6
Naknek	$124.1	5	99.6	9
Aleutian Islands (other)	$118.9	6	521.3	2
Bristol Bay	$37.7	23	23	25

Source: NOAA 2025

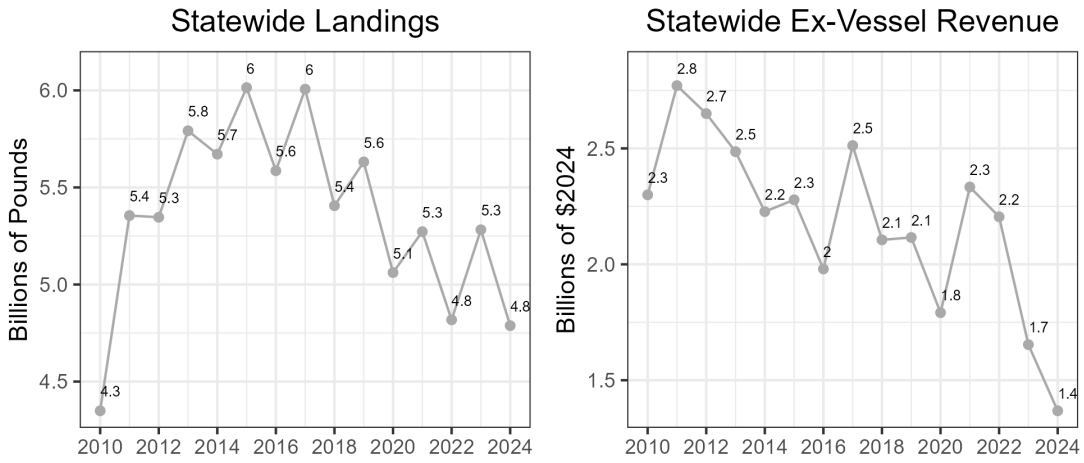
Within the State of Alaska, in 2024, SW communities accounted for over 65% of the state's revenue from the fisheries business tax at $10.6 million. Nearly all of the state's fishery landing tax, totaling over $4.5 million was collected based on activity in the region. On average since 2010, SW communities accounted for about 67% of the total fisheries business tax revenue and about 99.2% of the total fishery resource landing tax.

However, since the last report there have been substantial changes in fisheries landings and revenue across Alaska fisheries, caused by a combination of fishery disasters, processor closures and changes, as well as global market changes and high rates of inflation (NMFS 2024). Overall, landings across all

[1] It should be noted that in past years Alaska Peninsula (Other) (including King Cove, Sand Point, Chignik, and False Pass) was consistently in the top ten ports in the U.S., but changes in company ownership in 2024 lowered the number of participating processors below the confidential threshold and was therefore not reported.

Alaska fisheries have decreased by 20.4% since 2015 and ex-vessel revenue has decreased by 40% (Figure 3).

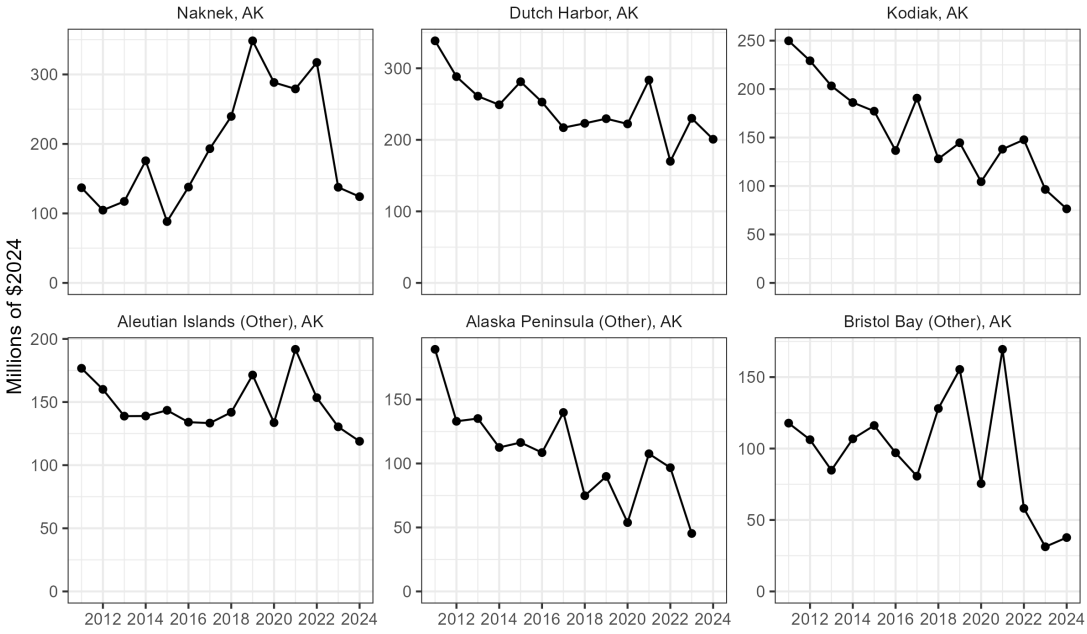
Figure 3. Statewide Landings and Ex-Vessel Revenue 2010–2024



Source: NOAA 2025

Decreases in ex-vessel revenue across key SW Alaska ports such as Dutch Harbor, Kodiak, and other ports in the Aleutians and Alaska Peninsula have been observed since 2010. Strong market conditions and rebounds in the Bristol Bay salmon fishery between 2018 and 2022 buoyed fisheries revenues in Alaska. However, ex-vessel revenues plummeted in 2023 and 2024 due to global competition, surplus inventories, and other unfavorable market conditions (Figure 4).

Figure 4. Ex-Vessel Revenue in SW Ports and Port Areas 2011–2024

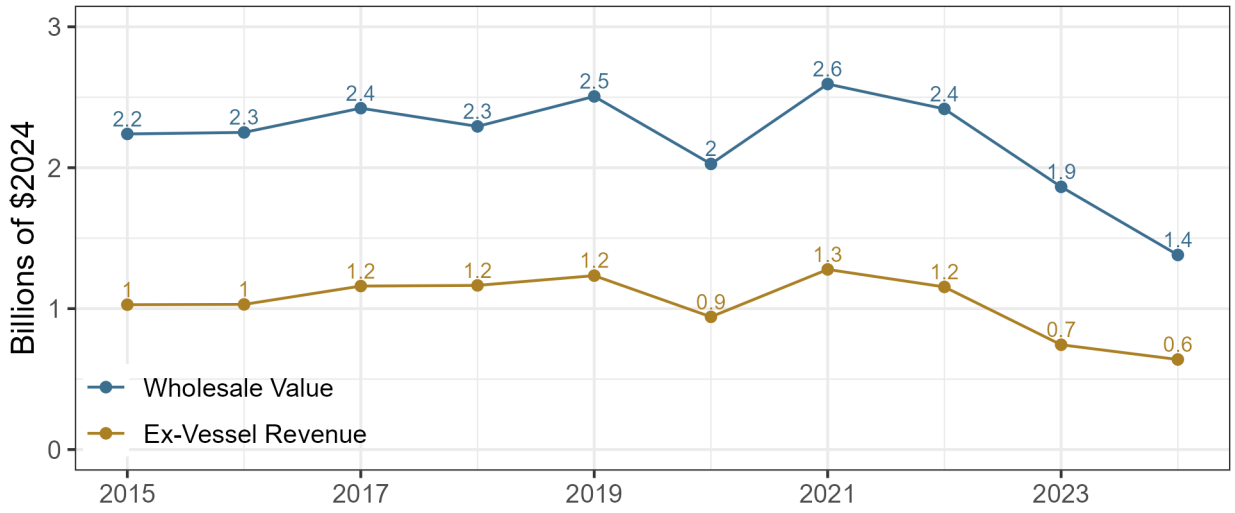


Note: data for Alaska Peninsula (other) are not available for 2024, due to confidentiality.

Source: NOAA 2025

Consistent with declines in statewide ex-vessel revenue, ex-vessel revenue landed across all SW ports decreased overall since 2015 (Figure 5). Since 2021, ex-vessel revenue dropped from $1.3 billion to $600 million in 2024, a 54% decline. In the same period, wholesale value from SW based processors dropped 46% from $2.6 billion to 1.4 billion.

Figure 5. SW Ex-Vessel and Wholesale Revenue 2015–2024



Source: Northern Economics Analysis based on data from CFEC (2026)

The sharp decline in shorebased ex-vessel and wholesale revenues across SW fisheries in recent years reflects multiple biological, market, and management shocks. The number of federally declared fishery disasters has increased over time. Of the 35 applications for fisheries disasters that have sought federal support, 33 have occurred since 2015, and 26 of those have been since 2020. Of the 35 disaster requests, 16 have affected SW regional fisheries and 15 of those have been since 2015. Of the 25 fishery disasters where a determination has been made, the total amount awarded is nearly $447 million, of which approximately $291 million is associated with SW fisheries. The majority of those have been Bering Sea crab fishery disasters since 2020 ($244 million).

However, even though federal fishery disasters have been increasing over time, the 2023 and 2024 revenue losses are not confined to a single species or region, but instead reflect broad-based declines across salmon, groundfish, and crab fisheries, compounded by global market conditions, post-pandemic price corrections, inflation, and the strength of the US dollar (NMFS 2024).

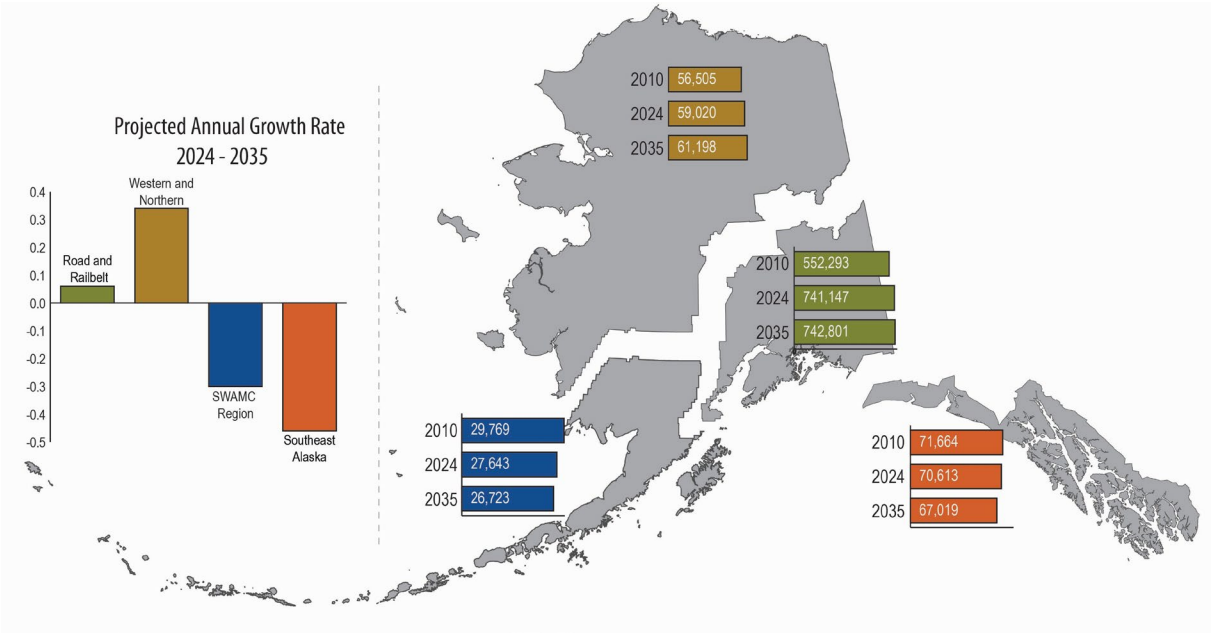
Declines in the value of SW regional fisheries not only affects those working in the industry, but can significantly affect local and regional government tax revenues, as well as the state revenues. The amount collected in shared fishery taxes varies significantly with ex-vessel revenues, but averaged $32.5 million between 2015 and 2024, of which SW regional communities accounted for 75% or $24.6 million (see Table 12 in section 3.1.4). Because taxes are assessed on a fiscal year basis, declines in tax revenues do not necessarily correspond with changes in ex-vessel revenue reported out on a

calendar year basis. However, in 2024, shared fishery tax revenues dropped to their lowest levels since 2010, at $20.7 million.

2.2 Changes in Population & Migration Patterns

The SWAMC and SE regions were the only two regions to lose population since 2014. At a net loss of 7.1%, population loss in the SWAMC region is the greatest in the state, though population loss has been relatively consistent at an average of 0.8% per year since 2015. The highest single year loss was recorded in 2023 at 1.6%. The SWAMC regional population decreased from 29,769 people in 2010 to 27,643 in 2024. The population is projected to further decrease to 26,723 by 2035 (Figure 6).

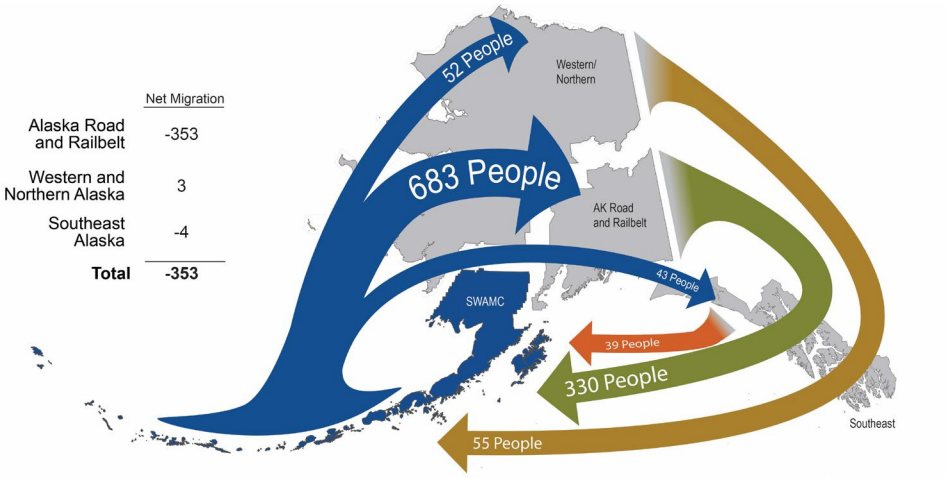
Figure 6. Historical and Forecasted Population by Region



Source: ADOLWD (2025b, 2025e, 2025f) and Northern Economics analysis.

Migration to and from the SWAMC region is shown in Figure 7. Migration is highest between the Alaska Road and Railbelt region, with 683 people a year on average moving from the SWAMC region to the ARR, and 330 people a year moving from the ARR to SW. Overall, there is a net negative flow of residents out of the SWAMC region. This pattern has increased since the last report period.

Figure 7. Average SW Annual In- and Out-Migration, 2020–2024

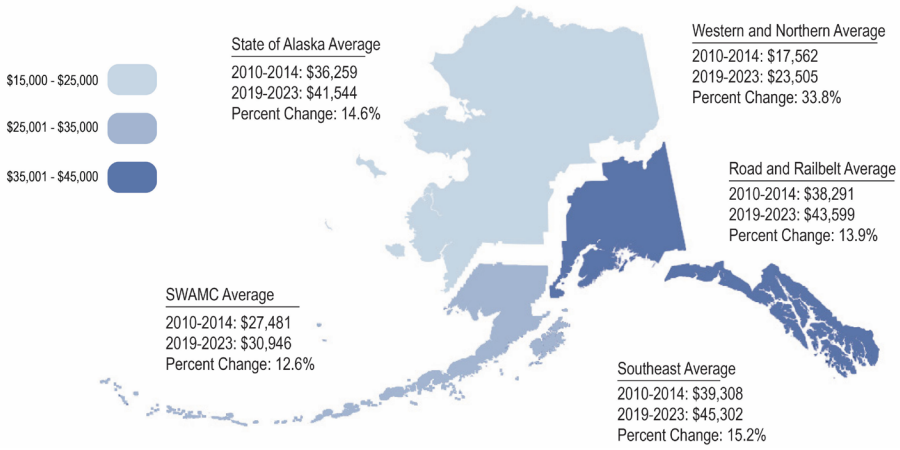


Note: This figure only captures migration within Alaska, and does not include in-migration or out-migration from beyond Alaska.
Source: ADOLWD (2025a) and Northern Economics analysis.

2.3 Changes in Income and Employment

On average, between 2019 and 2023 SW per capita income was $30,456. In the same period, per capita income was highest in SE at $45,302, followed closely by the ARR at $43,599. The WN region had the lowest per capita income ($23,505). SW residents' per capita income rose the least of any AK region at 12.6% when comparing 5-year averages from the prior period (2010–2014) to 2019–2023.

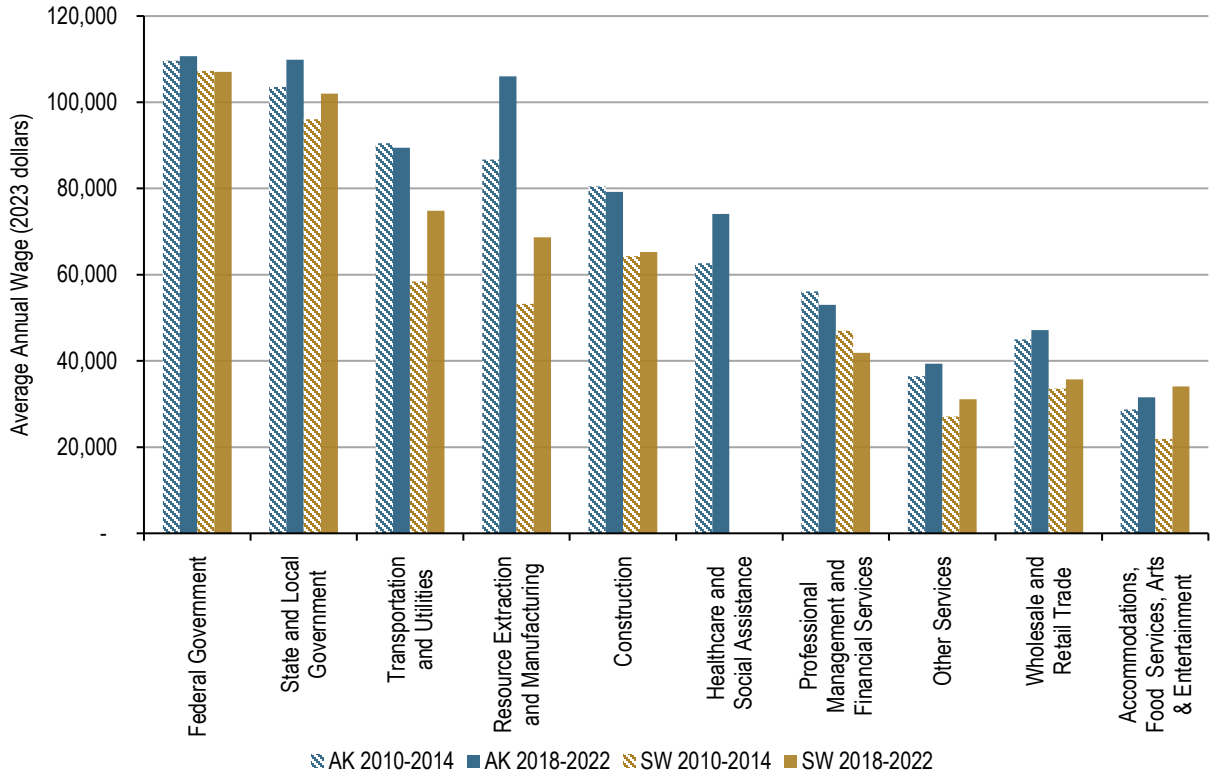
Figure 8. Average per Capita Income by Region and SW Borough/Census Area of Residence, 2019–2023



Source: Developed by Northern Economics based on data from USCB (2025) and ADOLWD (2025d and 2025g).

Figure 9 compares average annual wages by sector and region of residence for the state of Alaska and the SWAMC region for the 2010–2014 period covered by the prior report and 2018–2022. In SW, between 2018 and 2022 compared to 2011–2014, wages in the accommodations, food services, arts & entertainment sector experienced the most growth (55.7%), followed by resource extraction and manufacturing (29.0%) and transportation and utilities (28.1%). Two sectors in SW reported decreases in average wages: professional management and financial services (-10.9%) and federal government (-0.2%). The Resource Extraction and Manufacturing sector includes seafood harvesting and manufacturing employees; however, it is likely that seafood harvesting jobs are underestimated in the BEA counts, since these jobs are seldom reported for fishermen who do not receive a W-2 or 1099, including most commercial fishing crew. Northern Economics has not augmented the BEA estimates with independent estimates of fish harvesting workers; thus, the importance of this sector as a source of employment for residents of SW is even greater than is suggested by BEA data.

Figure 9. Average Annual Wages by Sector and Region of Residence, AK & SW, 2010–2014 versus 2018–2022



Note: There were insufficient data for the healthcare and social assistance sector in SW.

Source: Developed by Northern Economics based on data from BEA (2025b, 2025c) and ADOLWD (2025g).

In recent years, the total number of statewide jobs held by Alaskan residents has declined relative to the early 2010s (441,772 jobs versus 451,475 jobs). Additionally, SW residents in recent years have had an average of 8,439 jobs compared with 10,166 in the early 2010s (Table 2). Unlike in recent years, between 2010 and 2014, average annual employment was growing in all Alaska regions except

for WN. In the early 2010s, SW residents held 2.3% of all Alaskan jobs, which has declined to 1.9% in recent years (Figure 10).

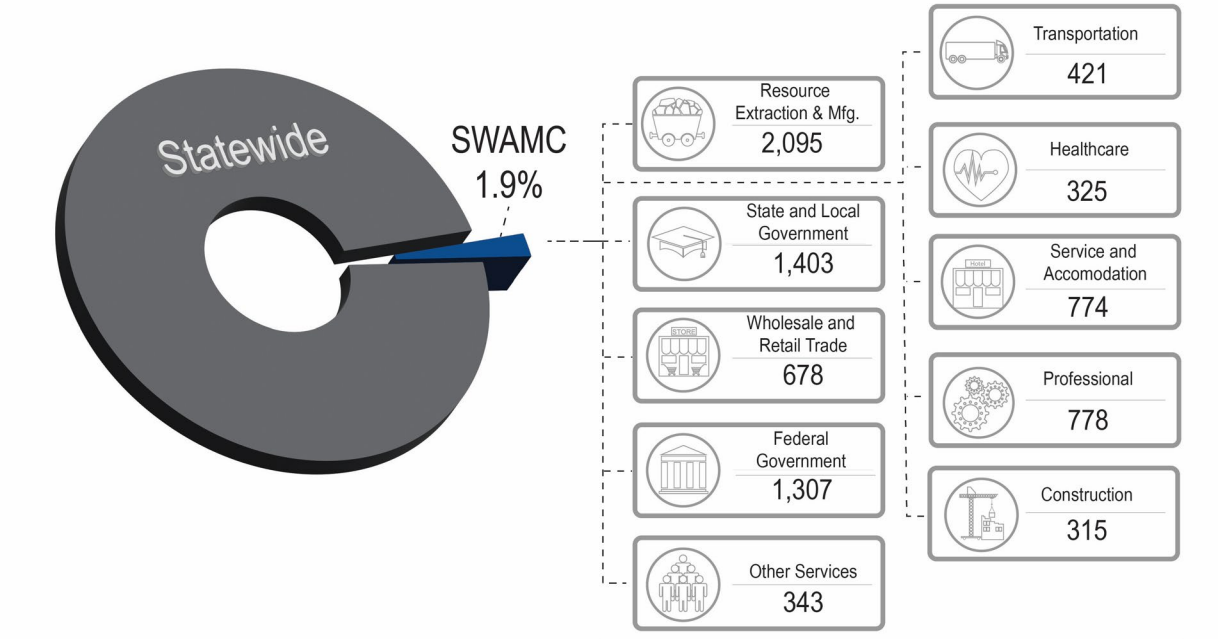
Table 2. Number of SW Resident Jobs by Sector and Period

Sector	SW (2010–2014)	SW (2018–2022)
Accommodations, Food Services, Arts & Entertainment	698	774
Construction	332	315
Federal Government	1,424	1,307
Healthcare and Social Assistance	476	325
Other Services	410	343
Professional Management and Financial Services	848	778
Resource Extraction and Manufacturing	3,494	2,095
State and Local Government	1,299	1,403
Transportation and Utilities	482	421
Wholesale and Retail Trade	703	678
Total	**10,166**	**8,439**
Avg Annual Growth in Total Employment	**3.60%**	**-0.60%**

Note: Non-disclosed employment is excluded.

Source: Developed by Northern Economics based on data from BEA (2025c).

Figure 10. Average Annual Employment of SW Residents by Sector, 2018–2022

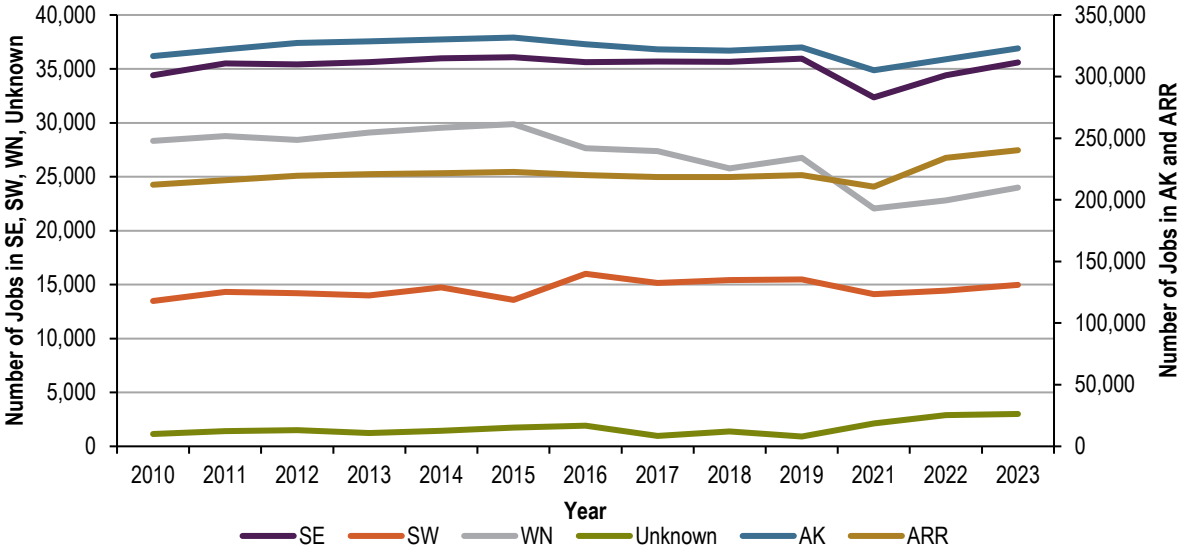


Note: Fish harvesting and processing employment is likely underestimated since self-employed workers are not included.

Source: Developed by Northern Economics based on data from BEA (2025c).

By place of work, the number of jobs in the SW region has increased slightly over time from 13,480 in 2010 to 14,987 in 2024 (Figure 11). As can be seen in the figure, all regions are generally following similar trends except for WN.

Figure 11. Total Employment by Region of Work, 2010–2023, Excluding 2020



Source: Developed by Northern Economics based on BLS (2025).

While the total number of jobs has remained relatively constant, there have been changes in the composition of jobs by sector (Table 3). The Resource Extraction and Manufacturing sector, including fisheries harvesting and processing, had the largest increase in the number of jobs located in SW as well as the share of all jobs in that sector in AK (26.3% increase and 6.6% increase). However, as noted above, it is likely that seafood harvesting jobs are underestimated in this data, including most commercial fishing crew.[2]

Table 3. Change in SW Jobs by Sector from 2010 to 2023

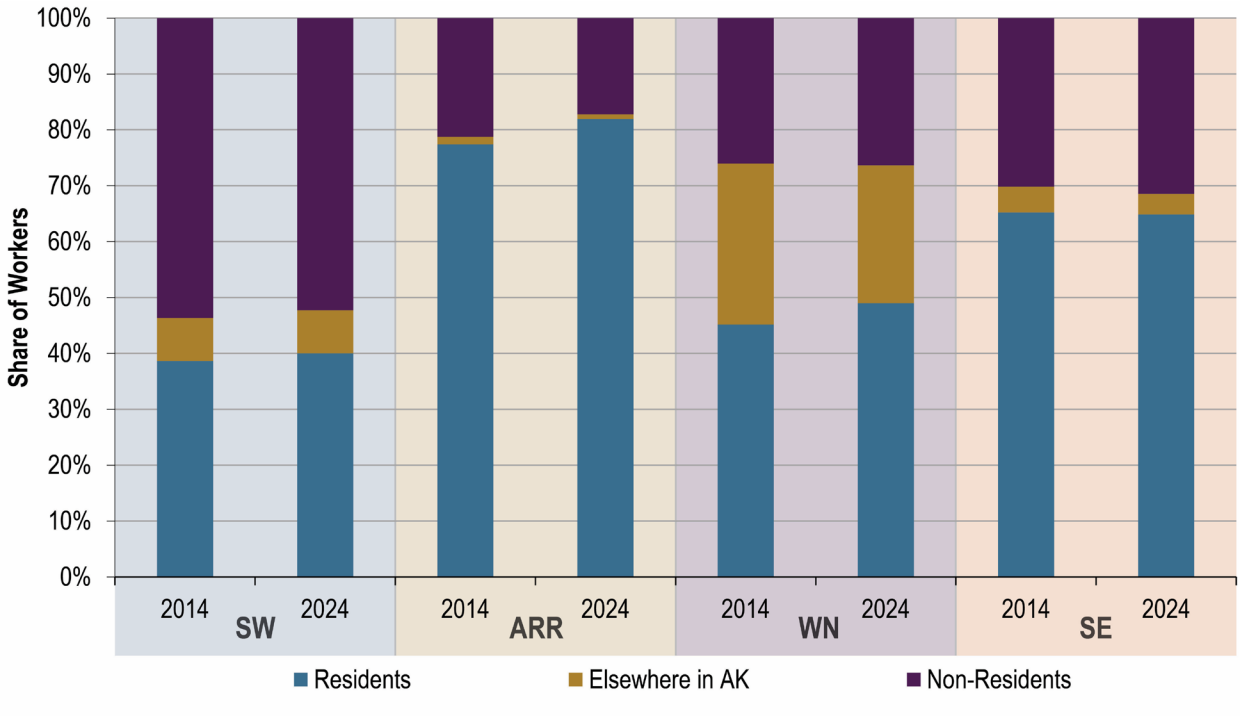
Sector	Change in Jobs (%)	Change in SW Share of AK (%)
Accommodations, Food Services, Arts & Entertainment	23.1	0.2
Construction	-6.9	-0.2
Federal Government	-21.0	-0.3
Healthcare and Social Assistance	4.3	-0.5
Other Services	-38.0	-1.1
Professional Management and Financial Services	-28.8	-0.5
Resource Extraction and Manufacturing	26.3	6.6
State and Local Government	14.6	0.9
Trade, Transportation, and Utilities	7.0	0.1

Source: Developed by Northern Economics based on BLS (2025).

[2] While commercial crew licenses collect information on residency, they do not collect information on the fisheries that the crewmembers are participating in or other information that would enable identification of how many crew are based in any given region.

Figure 12 shows the share of the workforce by region of residence and region of work in 2014 and 2024, which provides insight into commuting patterns. The share of commuters working in SW has remained stable since 2014, with over half of the workforce residing outside of the region. The only other region in AK with over half of the workforce residing outside of the region was WN. However, the vast majority of commuters to SW reside outside of AK while about half of commuters to WN reside elsewhere in AK.

Figure 12. Share of Workforce by Region of Residence and Region of Work, 2014 & 2024



Source: Northern Economics analysis of commuting patterns based on data from ADOLWD (Robinson 2015 & 2024)

Table 4 shows the share of residents who commute outside their region of residence for work in 2014 and 2024. In both years, a slightly higher share of SW residents commuted outside their region of residence compared with other regions. Comparing 2014 to 2024 shows a decline in the share of residents who commute beyond their region for work. As of 2024, the share of SW residents who commute elsewhere for work has become more similar to other regions (within 1.0 percent of ARR).

Table 4. Share of Residents Who Commute Outside their Region of Residence, 2014 & 2024

Region of Residence	2014	2024	Change
SW	10.4%	6.6%	-3.8%
ARR	7.6%	5.9%	-1.7%
WN	7.2%	4.9%	-2.3%
SE	5.8%	3.2%	-2.7%

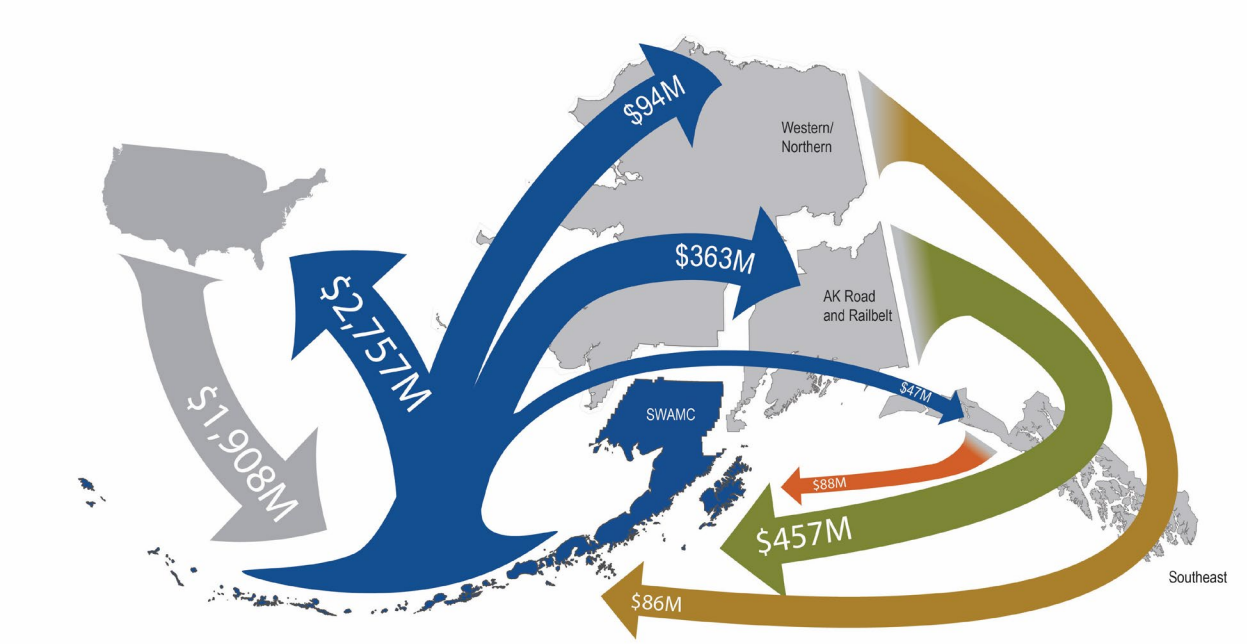
Source: Northern Economics analysis of commuting patterns based on data from ADOLWD (Robinson 2015 & 2024)

Taken together, this analysis of commuting patterns between SW and the other regions of the state reveals that more non-SW Alaska residents commute to SW for jobs than SW residents who commute to jobs outside their home region. This net importation of workers suggests that SW offers ample employment opportunities to residents of the other regions of Alaska, as well as non-residents.

2.4 Trade Flows and Economic Output

The total value of commodities and services exported from SW to the rest of the U.S. in 2022 amounted to about $2.8 billion, which was more than 5 times the combined value of exports to the other three regions of the state (Figure 13). Moreover, in 2022, 82% of SW's exports to the rest of the U.S. fell into the commodity category labeled "Food Products" (food manufacturing sector), of which it can be assumed that seafood products constitute the vast majority, if not all exports.

Figure 13. Interregional Trade Flows in 2022 (2024$)



Source: Developed by Northern Economics, Inc., based on data from IMPLAN

Overall, from 2014 to 2022, SW's total value of imports increased by 3% ($75 million) while total value of exports declined by 5% ($162 million; see Table 5). The value of exports from SW to other Alaska regions declined by about $41million and the value of exports to the Rest of the U.S. declined by $121 million. In 2014, SW exports accounted for 8% of total statewide exports to the rest of the U.S.; in 2022, SW's share of statewide exports was 7%. The value of imports from the Rest of the U.S., on the other hand, increased by $276 million and the value of imports from other Alaska regions decreased by $200 million (2024$) during the same period.

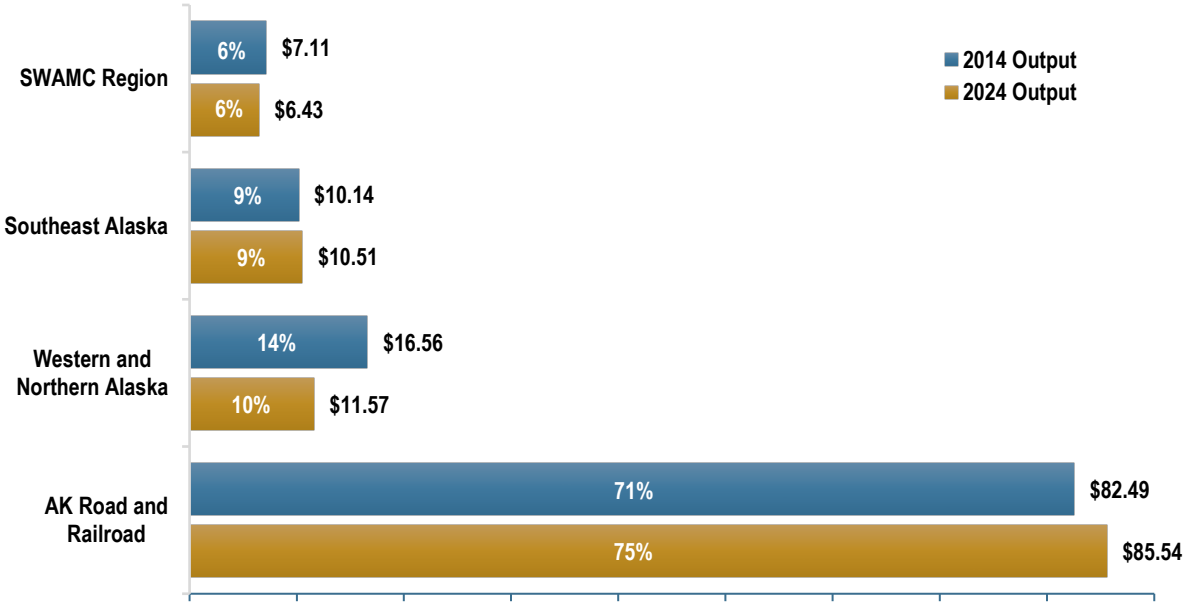
Table 5. Interregional Trade Flows with SW Alaska in 2014 and 2022, in millions (2024 $)

	Incoming		Outgoing	
Region	2014	2022	2014	2022
SE	$68	$88	$70	$47
WN	$181	$86	$100	$94
ARR	$581	$457	$376	$363
Rest of U.S.	$1,633	$1,908	$2,878	$2,757
Total	**$2,463**	**$2,538**	**$3,424**	**$3,262**

Source: Developed by Northern Economics, Inc., based on data from IMPLAN

There was a 2% decline in statewide economic output from $116 billion in 2014 to $114 billion in 2024. At the regional level, the changes varied, with a significant decline of about 30% in economic output in the WN region, 4% increase in both the SE and the ARR regions, and a 10% decline in the SWAMC region (Figure 14). The decline in the WN region's output was driven by the oil and gas sector, which experienced a drop in both price and production volumes in the last decade. This also contributed to the decrease in this region's share of total statewide output from 14% to 10%.

Figure 14. Change in Economic Output and Share of Statewide Output by Region (in billions of 2024$)



Source: Source: Analysis by Northern Economics, Inc., based on data from IMPLAN

Notably, for total statewide output from the seafood product preparation and packaging sector—whose output was ranked fourth overall for Alaska in 2024—SW's contribution of nearly $3 billion constituted 69%. Importantly, the data sources that inform IMPLAN's estimates of sectoral output do not capture output related to at-sea harvests and processing. SW's output values from the Water transportation and Commercial fishing sectors were also significant relative to respective statewide totals, at 19% and 44%, respectively.

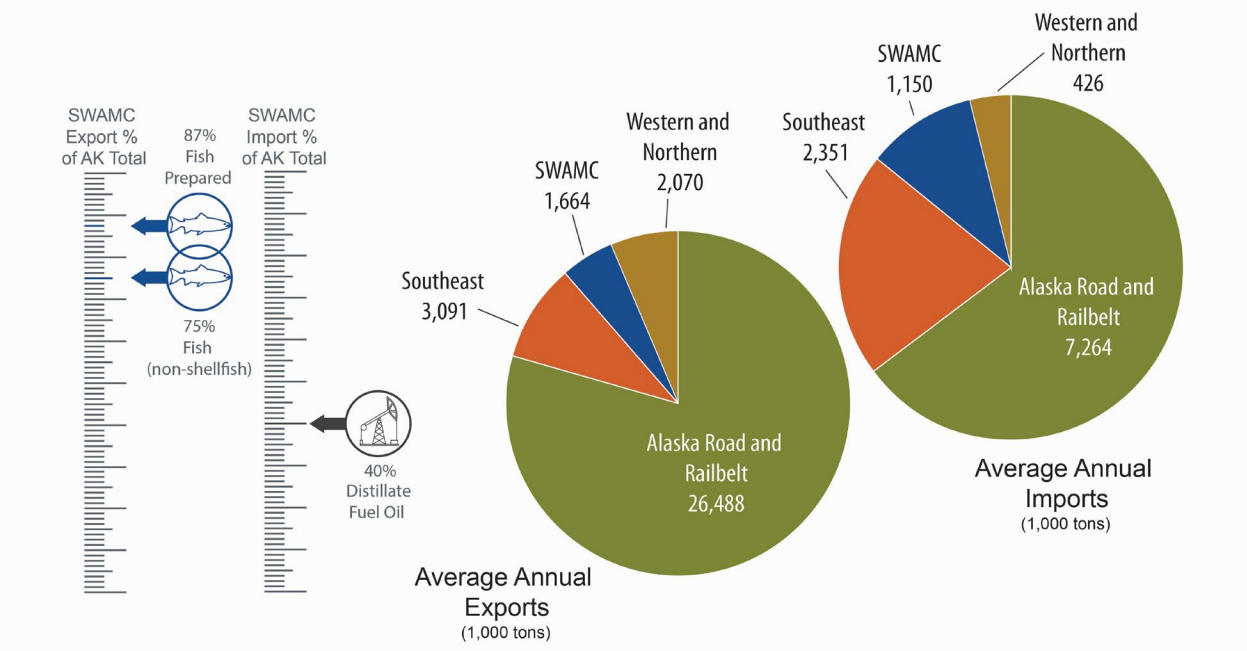
Between 2014 and 2024, SW's seafood product and preparation sector increased its significant contribution to the statewide output to 69% compared to 63% in 2014. The share of the region's commercial fishing sector increased to 44% compared to 22% in 2014, and the water transportation sector's contribution to the statewide output increased slightly from 14% in 2014 to 19%.

2.5 Changes in Domestic and International Waterborne Commerce

Waterborne trade, both domestic and international, is an important component of the SW economy, with large volumes of seafood products exported from and substantial volumes of petroleum products imported to the region.

On average between 2019 and 2023, the weight of domestic waterborne exports from SW accounted for a small percentage of the statewide total (33,313 tons), at 5% (1,664 tons, Figure 15).However, this is more than double what SW accounted for on average for 2012–2013 at the time of the prior Economic Geography report. As noted in the 2016 report, SW exports previously represented 2% of the statewide total, due to higher total exports and slightly lower levels of SW exports). The vast majority of SW's domestic waterborne exports are classified as Seafood Products (1,436 tons), which represents 75% of statewide domestic Seafood Product waterborne exports, an increase from 50% in 2012–2013. Unsurprisingly, in the same period the top domestic import to the SW region was distillate fuel oil (which includes diesel and heating oil), at 473 tons (and 40% of the statewide total), an important input to both seafood harvesting and processing. This represents a relative increase from 2012–2013, where distillate fuel oil was 33% of statewide total domestic imports.

Figure 15. Average Annual Domestic Waterborne Exports and Imports by Region, 2019–2023

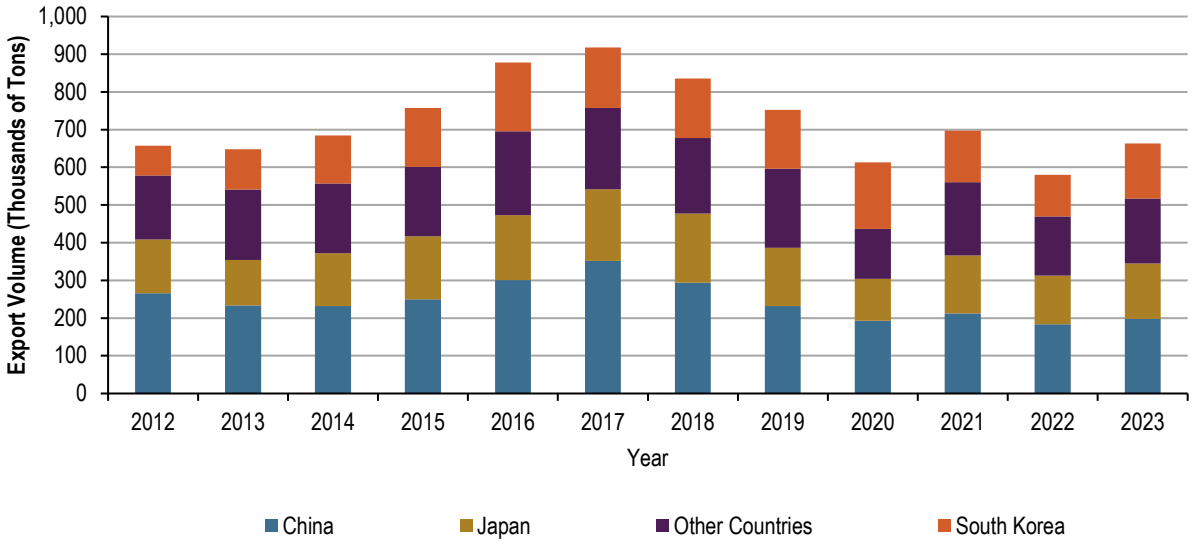


Source: Developed by Northern Economics based on data from USACE (2025b).

In terms of tonnage, Alaska's international waterborne exports were 19% greater than its imports annually on average from 2019 to 2023. Among the state's top exported commodity categories were seafood products and forest products, while petroleum products represented a large portion of imports. Additionally, SW's share of statewide international waterborne exports greatly exceeded its share of domestic exports (22.0% versus 5.0%); however, SW trailed behind WN and ARR for total exports by tonnage.

From 2019 to 2023, China, South Korea, and Japan were the top destinations for exports from SW by tonnage, with the overwhelming majority of these exports consisting of seafood products and forest products. Seafood export volume has fluctuated some year to year from 2010 to 2023, peaking in 2017 at 918,000 tons. Total seafood export volume in 2023 was similar to 2012 (Figure 16). The share of total volume of seafood exports going to China has fallen by 10.7%, while the share of seafood exports going to South Korea has increased by 10.1%. By tonnage, the volume of seafood product exports to South Korea nearly doubled, increasing by 86.7%.

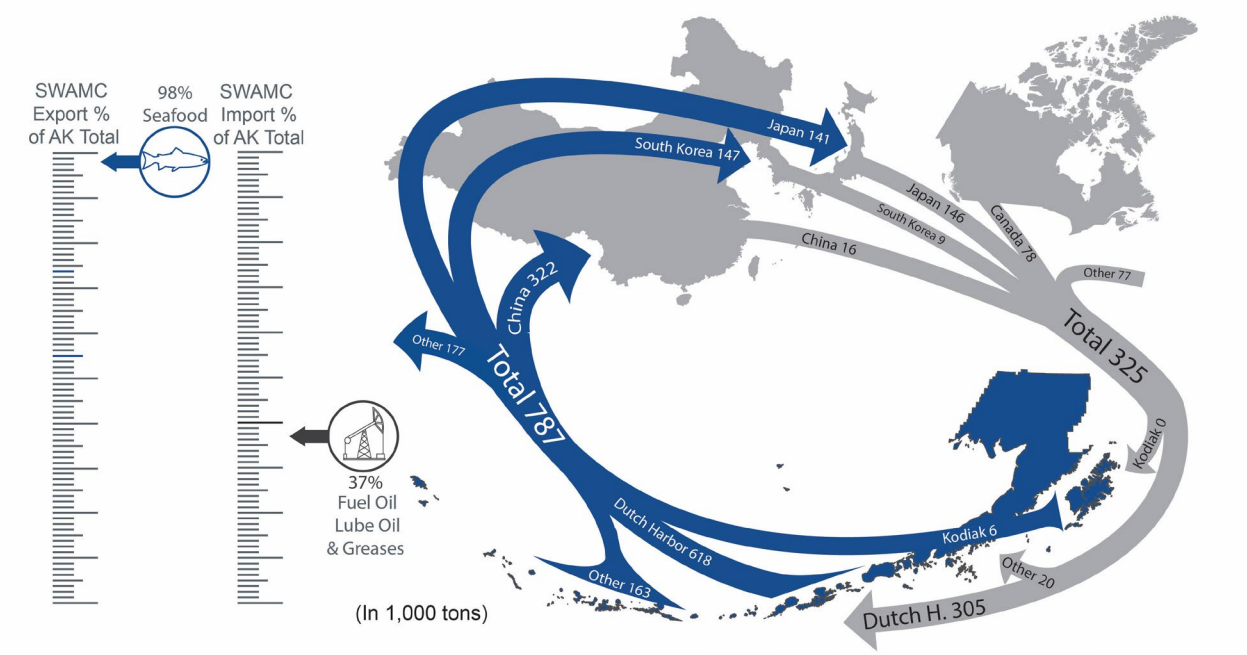
Figure 16. Annual International Seafood Exports by Destination from SW, 2012–2023



Source: Developed by Northern Economics based on data from USACE (2025a).

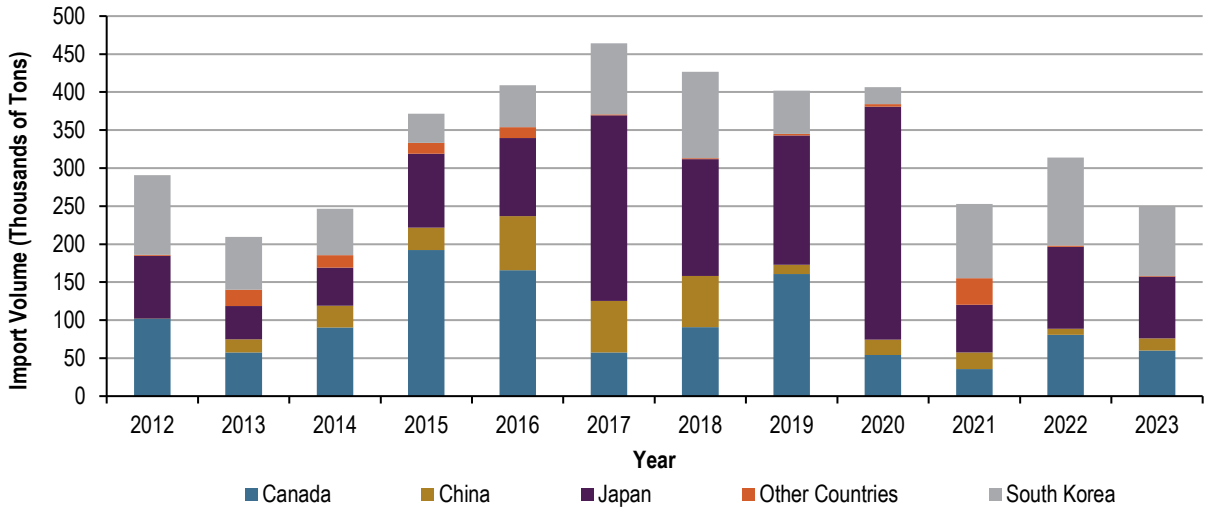
Figure 17 shows average annual international waterborne imports and exports between the SWAMC region and the rest of the world for the 2019–2023 period. In recent years, the largest source of international imports to SW by total tonnage originated from Japan (44.8%), driven by substantial fuel oils, lube oil, and grease imports (Figure 18). Other noteworthy trade partners for imports to SW included Canada, China, and South Korea.

Figure 17. Average Annual International Waterborne Imports and Exports (1,000 tons), SW, 2019–2023



Source: Developed by Northern Economics based on data from USACE (2025)

Figure 18. Annual International Waterborne Imports to SW by Country of Origin, 2012–2023



Source: Developed by Northern Economics based on data from USACE (2025a).

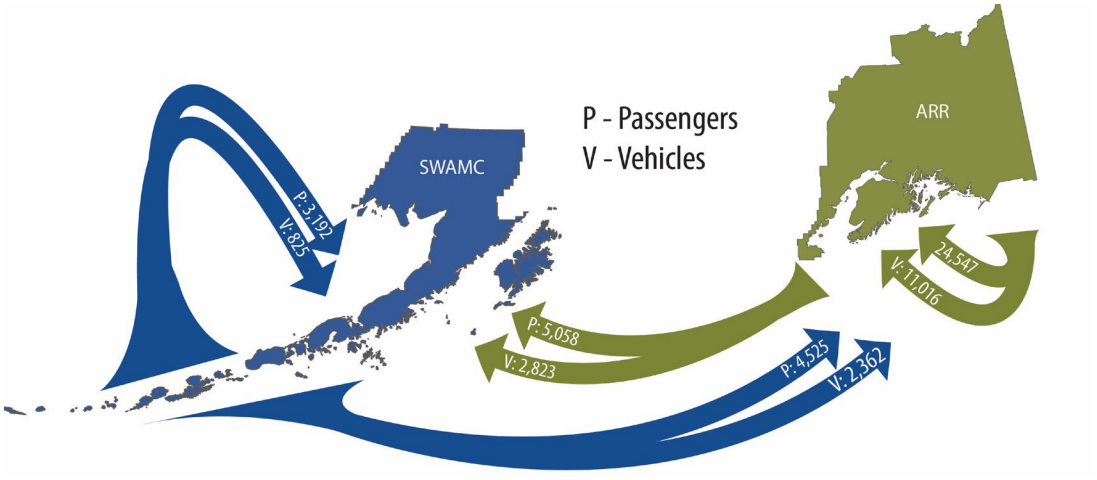
From 2019 to 2023, Dutch Harbor remained the key port for international exports and imports in SW, which aligns with historical norms given its strategic location for international trade. Historically, Kodiak was a key port for international forest products exports. Notably, over the past decade, international exports of forest products have declined, and as a result, Kodiak no longer plays a meaningful part in international trade in terms of volume.

It is important to note that seafood supply chains are complex and variable across regions of Alaska. In some areas, like Dutch Harbor, it is common for seafood products to be processed and shipped directly overseas; in other ports, it may be more common for seafood products to be processed locally, but then sent to Seattle or other areas before shipped to their final destination (Northern Economics, 2011; McKinley Research Group 2023). It is estimated that Alaska's seafood industry ships half a billion pounds of seafood products to Seattle or Tacoma each year (McKinley Research Group 2023). Additionally, because the data here are in terms of weight, international waterborne commerce trade values may vary substantially, which may be important for high-volume, but relatively low-value fisheries like the Alaska pollock fishery concentrated in some ports, compared to lower volume but higher value fisheries, like crab, salmon, or other groundfish.

2.6 Alaska Marine Highway System (AMHS)

The primary purpose of the Alaska Marine Highway System (AMHS) is to connect roadless and remote communities in Alaska with the rest of the U.S. highway system, helping to meet the social, educational, and economic needs of Alaskans. The AMHS is a critical means of transportation between SW and ARR, as well as between points within SW, serving as the region's equivalent of ARR's road system. In 2019 and 2021–2024 5,058 passengers and 2,823 vehicles (including cargo) were transported from ARR to SW, with slightly lower volumes traveling from SW to ARR (Figure 19). Additionally, 3,192 passengers and 825 vehicles were transported from one place to another within the SW region annually via the AMHS.

Figure 19. Average Annual Intra- and Interregional Utilization of AMHS, 2019, 2021–2024

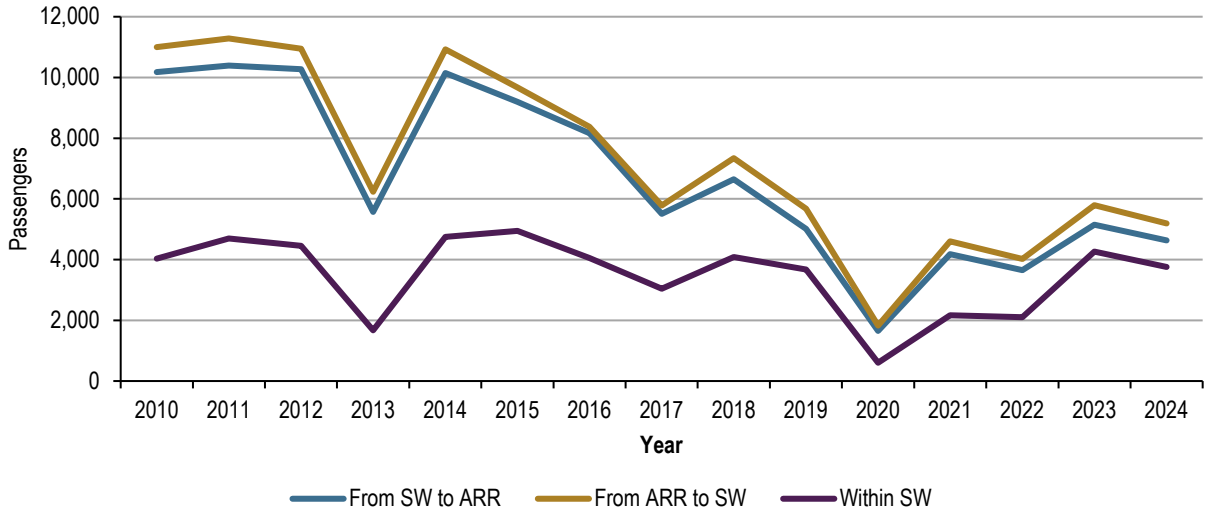


Source: Developed by Northern Economics based on data from ADOTPF (2010–2024)

While vessel schedules can vary year-to-year, utilization of the AMHS for transport both within SW and from SW to ARR has gradually declined since the early 2010s (Figure 20 and Figure 21). Causes of this reduction in AMHS utilization included reduced operations as a result of budget constraints from 2015 to 2018, a union strike in 2019, and then pandemic impacts in 2020 and 2021. Passenger

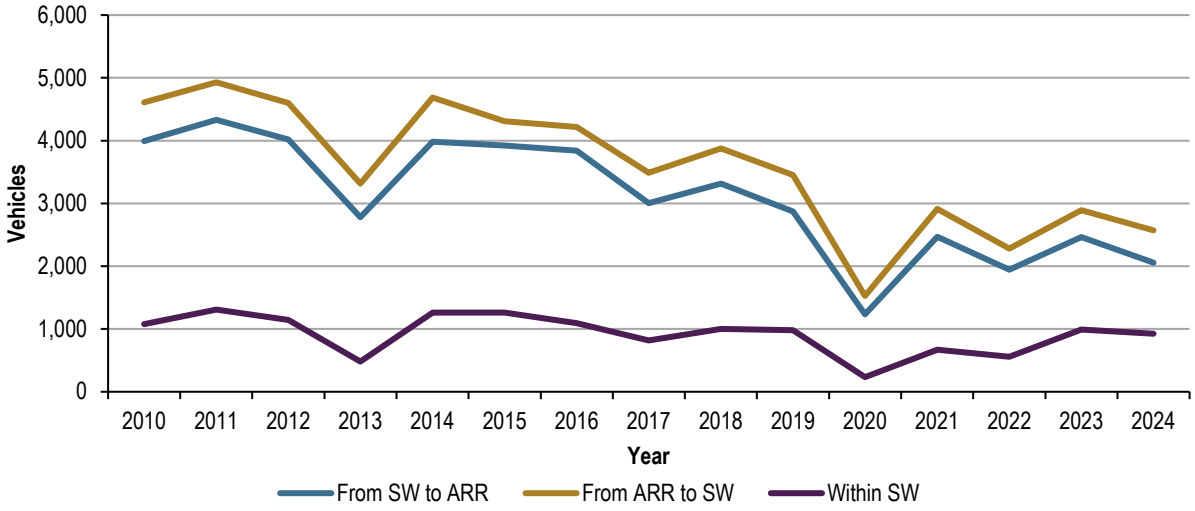
and vehicle volumes peaked in 2011, when there were 21,675 passengers and 9,260 vehicles transported between SW and ARR regardless of direction. Interregional passenger and vehicle volumes in 2024 were about half of what they were in 2010. However, the volume of passengers transported on AMHS has declined steadily across the whole system beyond SW. Across the AMHS system, passenger volumes have declined by 42.4% and vehicle volumes have declined by 41.8% since 2010.

Figure 20. SW Region AMHS Passenger Volumes, 2010–2024



Source: Developed by Northern Economics based on data from ADOTPF (2010–2024).

Figure 21. SW Region AMHS Vehicle Volumes, 2010–2024



Source: Developed by Northern Economics based on data from ADOTPF (2010–2024).

In 2024, Homer was the primary port of origin for AMHS vessel transits from ARR ports to SW ports, and the primary destination for vessel trips from SW ports to ARR ports. Meanwhile, the

overwhelming majority of passenger and vehicle transports from ARR destined for SW ports arrive in Kodiak. These primary ports align with historical norms for the AMHS during the 2010s.

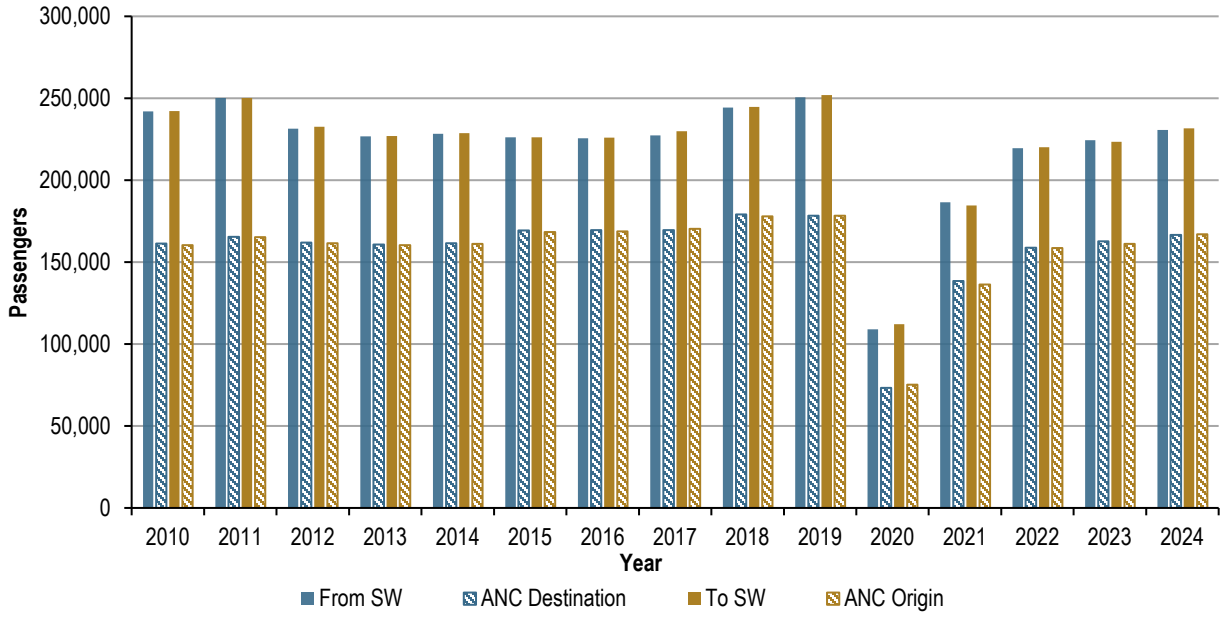
2.7 Air Transport

In the absence of a road system connecting SW to the rest of the state, aviation represents an important interregional mode of transport for people, freight, and mail.

SW relies on air transport particularly for the movement of passengers and mail. Over the five year period ending in 2023, combined inbound transport of passengers, freight, and mail to SW and outbound transport of passengers, freight, and mail from SW accounted for 6.3%, 1.0%, and 12.4% of combined inbound volumes arriving in Alaska and outbound volumes departing Alaska respectively (see Table 41 in section 8). These figures include all inbound passengers, freight, and mail originating from points within Alaska or airports outside the state, as well as outbound transports destined for either intrastate locations or points outside Alaska.

Figure 22 shows annual total air passenger travel to and from SW from 2010 to 2024, including the number of passengers going between Anchorage and SW. There was a sharp decline in air passenger travel that coincided with the COVID-19 pandemic in 2020, but since 2020, air passenger travel volume has gradually recovered, growing slightly each year. As of 2024, it is nearing 2017 levels but still has not rebounded to 2019 levels.

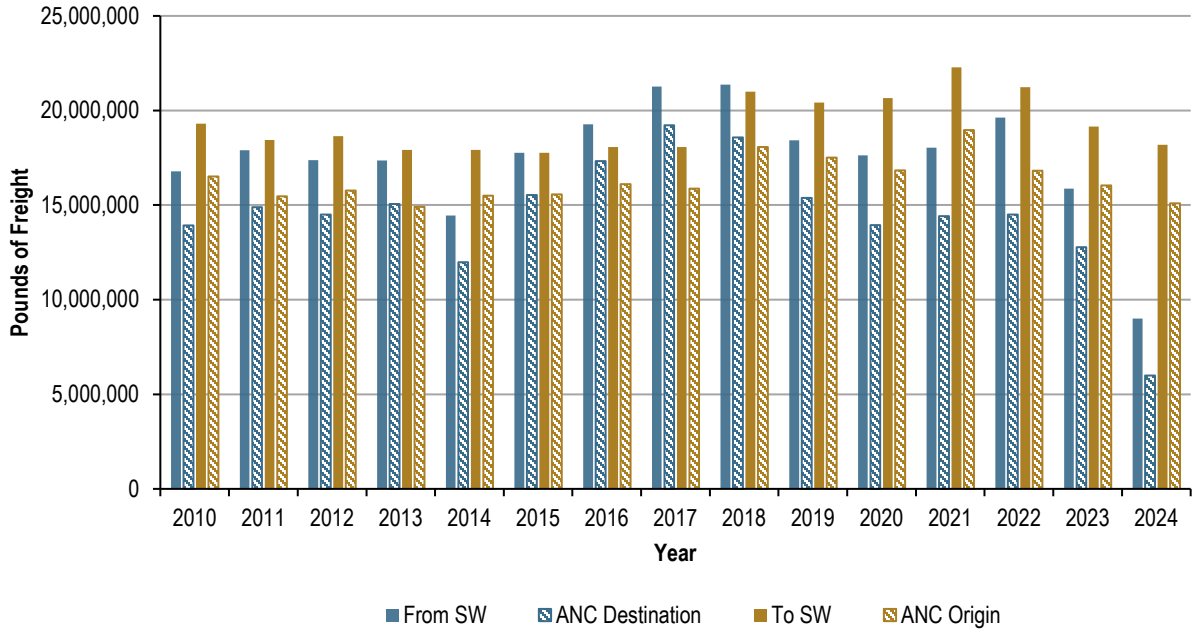
Figure 22. Annual Total Air Passenger Travel to and from SW, 2010–2024



Source: Developed by Northern Economics based on BTS (2025).

Figure 23 shows annual total air freight to and from SW from 2010 to 2024, including the volume of freight going between Anchorage and SW. Interestingly, since 2022, there has been a major shift in air freight volumes from SW to other places. Since 2022, annual air freight volume has decreased by 54.1% to all destinations, and air freight volume to Anchorage has decreased by 58.6%. However, over the same period air freight volume going to SW only declined by 14.3%, which is more similar to other year-to-year fluctuations. Additionally, comparing the five-year average of the first five years to the last five years included in Figure 23, we see that air freight volumes from SW have declined by 4.4% while volumes to SW have increased by 10.1%.

Figure 23. Annual Air Freight Transported to and from SW, 2010–2024



Source: Developed by Northern Economics based on BTS (2025).

2.8 Tourism

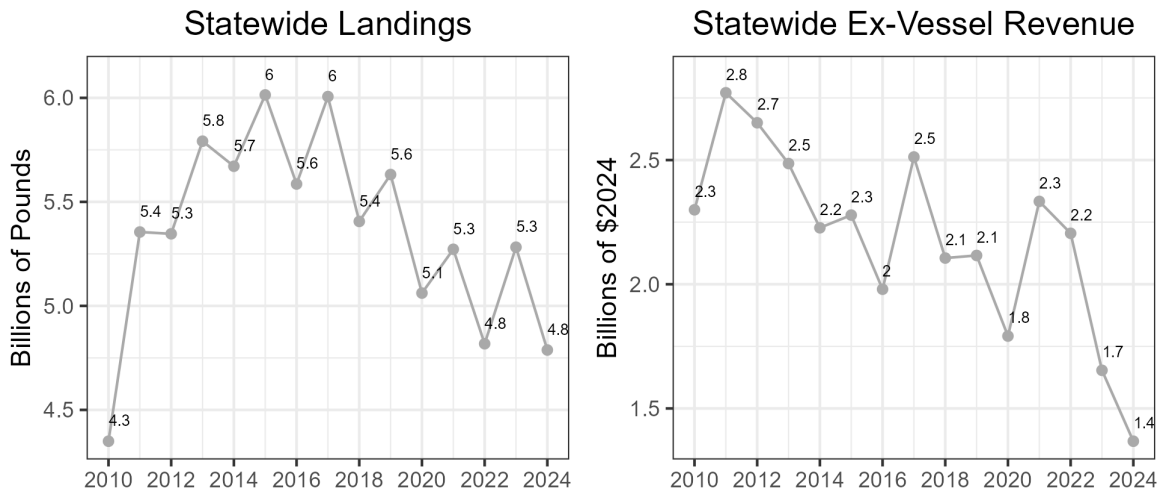
Southwest Alaska represents a modest but growing share of the state's visitor economy, accounting for roughly 5% of winter visitors, 3% of summer visitors, 7% of summer visitor nights, and about 6% of direct tourism spending in 2022–2023. Visitation to the region has increased over time, with summer visitor volumes rising from 58,000 in 2011 to nearly 88,000 in 2022. Guided group travelers are the most likely visitor type to travel to Southwest and to Kodiak specifically, and they participate heavily in wildlife viewing, bear viewing, local cuisine, shopping, museums, and boat excursions, as well as higher rates of adventure activities compared to other traveler types. Although cruise visitors make up a relatively small share of total SW visitors, cruise activity remains economically important to Kodiak and Dutch Harbor, with visitation rebounding post-pandemic and strong port call schedules heading into 2025.

These findings are drawn from recent tourism reports produced by McKinley Research Group and Destination Analysts in partnership with the Alaska Travel Industry Association (ATIA), which now serve as the primary source of statewide visitor data following the discontinuation of the Alaska Visitors Statistics Program in 2016. It is important to note that ATIA's definition of "Southwest Alaska" differs slightly from the definition used elsewhere in the report (including the inclusion of the Bethel Census Area), and this section reflects ATIA's regional boundaries without reconciliation to the study's definition.

3 SW Commercial Fisheries

Fisheries are the main driver of the SW regional economy, and as such, what occurs in the fisheries harvesting and processing sectors can significantly affect the trends discussed in all other sections of this report. Since the last report there have been substantial changes in fisheries landings and ex-vessel revenue across Alaska fisheries, caused by a combination of fishery disasters, processor closures and changes, as well as global market changes and high rates of inflation (NMFS 2024). Overall, landings across all Alaska fisheries have decreased by 20.4% since 2015 and ex-vessel revenue has decreased by 40% (Figure 24).

Figure 24. Statewide Landings and Ex-Vessel Revenue 2010-2024



Source: NOAA 2025

Despite declines, in 2024, SW Alaska was still home to 4 of the 10 top ports in the U.S. in both volume and value of commercial fish landings, further illustrating the vast importance of commercial fishing in SW waters to the region, state, and country (NMFS 2025). Table 6 identifies the top U.S. ports by weight of commercial seafood landings in 2024, with the areas of the circles corresponding to ports' landings by weight. Ex-vessel values of commercial fisheries landings in SW waters illustrate the economic importance of seafood harvesting and processing to the regional and state economies. Ports in SW accounted for 46% of the total weight of seafood landings across the top 25 U.S. ports (ranked by weight of seafood landings) in 2024 and 35% of the total value of seafood landings across the top 25 ports (ranked by value of seafood landings) (NMFS 2025). Due to changing circumstances in the region, Alaska Peninsula (other) was confidential in 2024 and therefore not included in the list of top ports where it often is in the top 10 ports in the United States in both landed value and landed weight. Figure 25 shows the ex-vessel revenue of the six top Alaska ports, all within the SW region, all of which experienced a decrease between 2010 and 2024 with some notable port changes. Naknek rose to the top Alaska port from 2018 to 2022, except 2021, which was due to historic harvests in the

Bristol Bay salmon fishery, and overtook Dutch Harbor, which typically holds the top spot. Generally, from 2017 to 2022, all ports appear to have experienced more differences year to year than previously. Figure 26 illustrates the revenue produced from major species groups in Alaska showing that all species, except pollock, experienced a downward trend in revenue from 2010 to 2024. Since the last report there have been substantial changes in fisheries landings and revenue across Alaska fisheries, caused by a combination of fishery disasters, processor closures and changes, as well as global market changes and high rates of inflation (NMFS 2024).

Table 6. Landed Value and Weight of top SW Alaska Ports, 2024

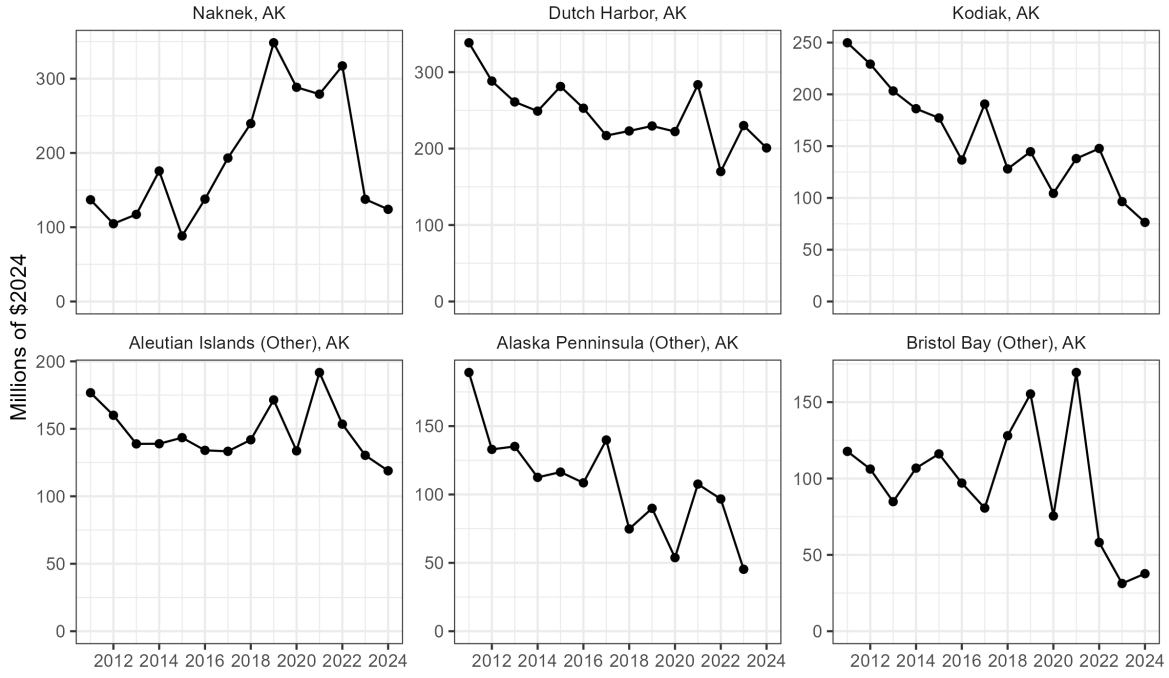
Port	Landed Value ($ Million)	U.S. Rank	Weight (Million pounds)	U.S. Rank
Dutch Harbor	200.8	2	784	1
Kodiak	76.4	9	214.3	6
Naknek	124.1	5	99.6	9
Aleutian Islands (other)	118.9	6	521.3	2
Bristol Bay (other)	37.7	23	23	25
Alaska Peninsula (other)	conf		conf	

Note: Ports have been aggregated into Port Groups by NMFS to protect confidential business information, therefore Naknek includes King Salmon and Bristol Bay (Other) includes St. Paul and St. George. A description of these port groups can be found here: https://www.st.nmfs.noaa.gov/Assets/commercial/pdf/akportgroups.pdf

In 2024, the Alaska Peninsula (other) port group was confidential. It is included here as it is frequently in the top 25 ports in the US.

Source: NMFS 2025

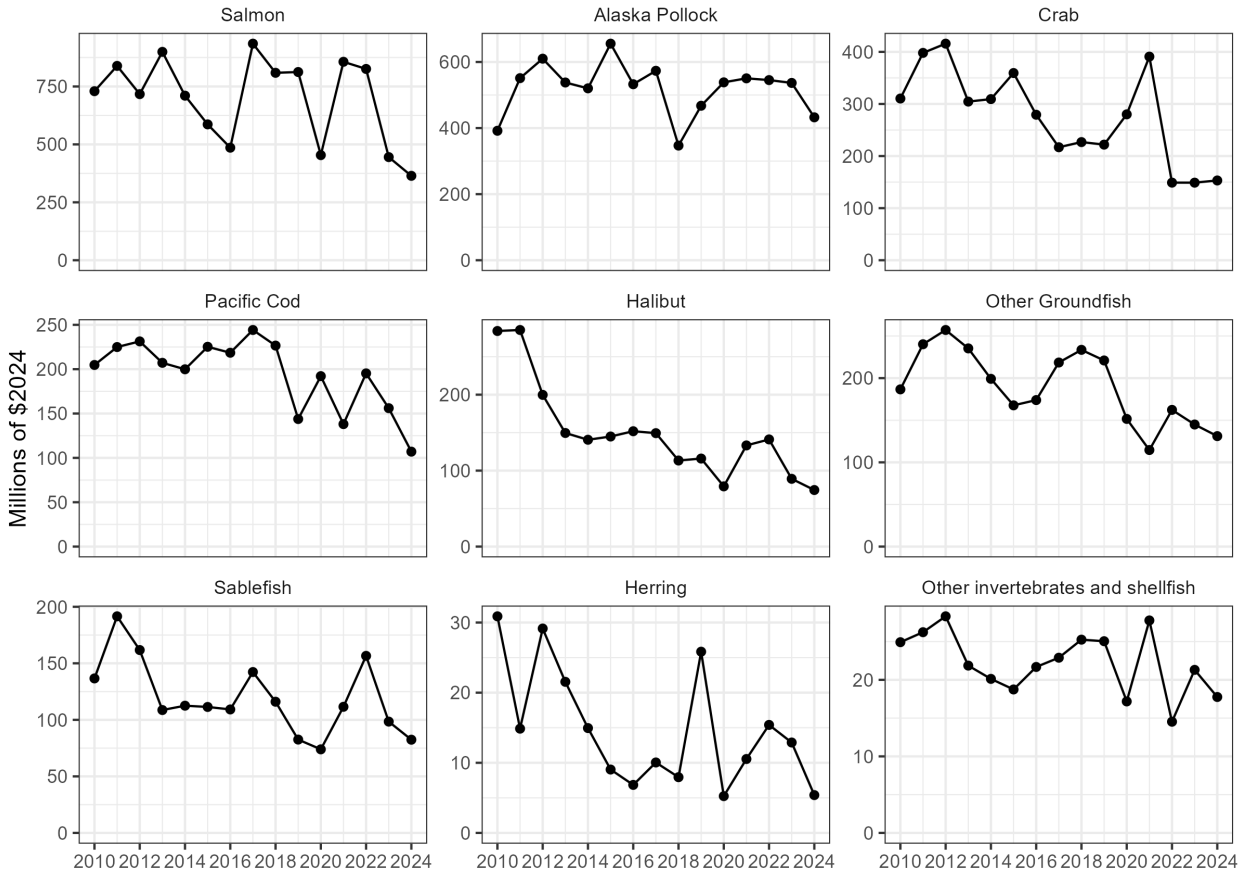
Figure 25. Ex-Vessel Revenue of Top SW Ports



Note: Ports have been aggregated into Port Groups by NMFS to protect confidential business information, therefore Naknek includes King Salmon and Bristol Bay (Other) includes St. Paul and St. George. Data for Alaska Peninsula (Other) were withheld in 2024 due to confidentiality constraints. A description of these port groups can be found here: https://www.st.nmfs.noaa.gov/Assets/commercial/pdf/akportgroups.pdf

Source: NMFS 2025

Figure 26. Alaska Revenue by Major Species Groups 2010–2024



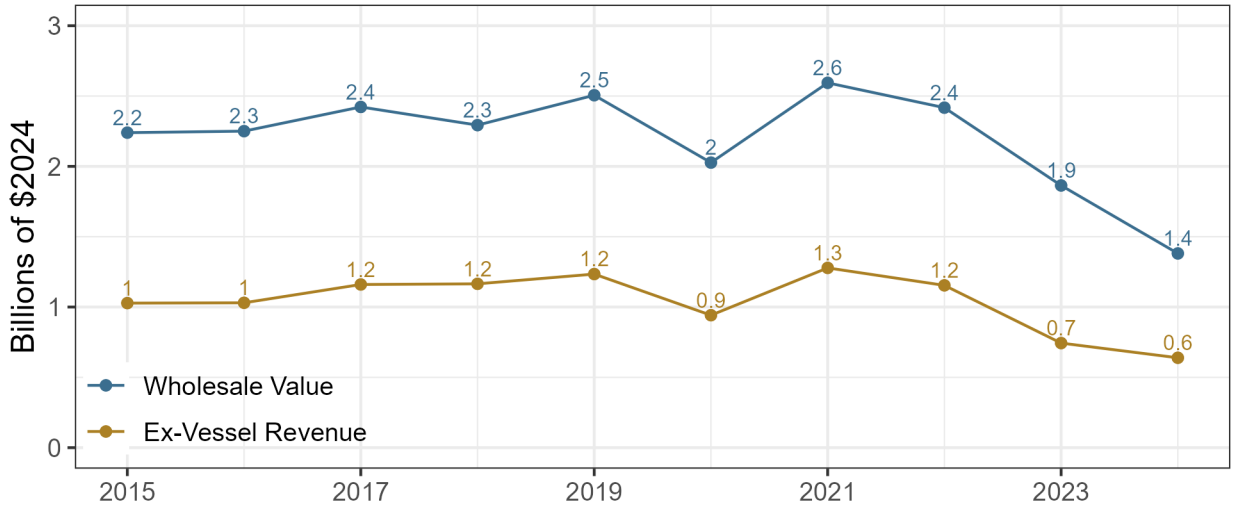
Note: Data represents all species that are landed in Alaska. All values have been adjusted for inflation using the GDP implicit price deflator.

Source: NMFS 2025

3.1 Shorebased Ex-Vessel and Wholesale Value

Consistent with declines in statewide ex-vessel revenue, the ex-vessel revenue landed across all SW ports decreased overall since 2015 (Figure 27). Since 2021, ex-vessel revenue dropped from $1.3 billion to $600 million in 2024, a 54% decline. In the same period, wholesale value from SW based processors dropped 46% from $2.6 billion to 1.4 billion.

Figure 27. SW Shorebased Ex-Vessel and Wholesale Value 2015-2023



Source: Northern Economics Analysis based on data from CFEC (2026)

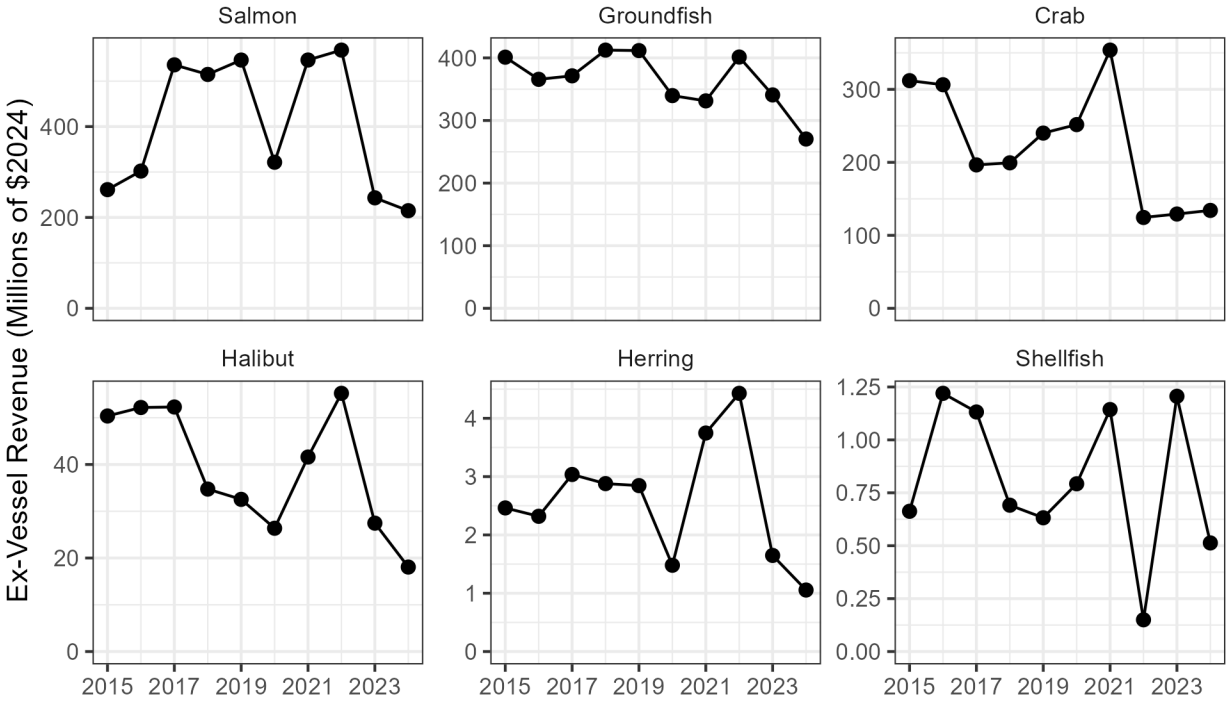
The following sections provide more information about how ex-vessel and wholesale revenue have changed across different species groups landed in SW regional ports, as well as how SW resident fishery earnings have changed over time.

3.1.1 SW Shorebased Ex-Vessel Value by Species Group

Shorebased ex-vessel revenue in SW Alaska show similar trends as the statewide species group trends, particularly for salmon, groundfish, and crab (Figure 28).[3] When comparing average annual ex-vessel revenue for 2020–2024 compared to the previous five years, all fishery groups have experienced declines (Table 7), ranging from roughly 9% (herring) to 24% (halibut). Groundfish, salmon, and crab ex-vessel revenue all decreased by over $50 million for each species group.

[3] Does not capture revenue to at-sea sectors including mothership or catcher-processing sectors.

Figure 28. SW Shorebased Ex-Vessel Revenue by Fishery Group 2015-2024



Source: Northern Economics Analysis based on data from CFEC (2026)

Table 7. Changes in Average SW Shorebased Ex-Vessel Revenue by Fishery Group and Period

	Average Ex-Vessel Revenue (millions of $2024)		
Species Group	2015-2019	2020-2024	Percent Change
Salmon	$432.06	$378.87	-12.3%
Groundfish	$392.48	$336.75	-14.2%
Crab	$250.83	$198.66	-20.8%
Halibut	$44.43	$33.74	-24.1%
Herring	$2.71	$2.47	-8.8%
Shellfish	$0.87	$0.76	-12.3%
Total	**$1,123**	**$951**	**-15.3%**

Source: Northern Economics Analysis based on data from CFEC (2026)

As discussed in the previous section, a number of factors contribute to the overall declining trend, but inflation and market factors have affected nearly all Alaska fisheries in recent years, resulting in the declines in most fishery groups in 2023 and 2024—in particular, tariffs and the strength of the US dollar compared to the currency of countries that typically import Alaska seafood. Some of these dynamics include tariffs implemented in the summer of 2018 that affected US seafood exports to China including products sent to China for reprocessing (White, 2018). There is also interplay with

Russian exports that directly compete with Alaska seafood and can drive prices lower for pollock, cod, salmon, and crab (NMFS, 2024).

Other factors include the COVID-19 pandemic and fishery closures stemming from environmental conditions, resulting in federal fishery disaster declarations. There have been increases in the number of federal fisheries disaster requests throughout the state of Alaska since 2010 including salmon fisheries from the Yukon River to Prince William Sound, Gulf of Alaska Pacific Cod, as well as in the Red King Crab, Tanner Crab, and Bering Sea Snow Crab fisheries.

Most of the disaster requests have been approved or are still pending a decision. Of the 35 disasters that have applied for federal support, 33 of them occurred since 2015 with 26 of them occurring since 2020 (Table 8). Of the 35 disaster requests, 16 have affected SW regional fisheries and 15 of those have been since 2015.. As of January 2026, one crab and nine salmon fishery disaster requests are still pending a determination, and thus do not yet have a funding allocation from Congress. For the remaining 25 fishery disasters the total amount awarded is nearly $447 million, with 55% allocated to crab fishery disasters, 35% to salmon fisheries, and the remaining 10% to groundfish fisheries. Of the total amount awarded, approximately $291 million is associated with SW fisheries disasters, the majority of which have been Bering Sea crab fishery disasters since 2020 ($244 million).

Table 8. Fishery Disaster Funding Requests from Alaska Fisheries

Fishery Group	2010–2014	2015–2019	2020–2024	Total
Salmon	$20,797,534 (2)	$110,463,082 (4)	$25,433,518 (20*)	**$156,694,134 (26*)**
Crab	-	$14,382,719 (2)	$233,609,515 (5*)	**$247,992,234 (7*)**
Groundfish	-	$24,416,440 (1)	$17,790,330 (1)	**$42,206,770 (2)**
Total	**$20,797,534 (2)**	**$149,262,241 (7)**	**$276,833,363 (26*)**	**$446,893,138 (35*)**

Source: NOAA Fisheries Funding and Financial Services (2025)

Note: The value in each cell is the total allocated amount to fisheries disasters in that fishery group with the number of disasters in parentheses. In the last period, there are three salmon disasters that have been declared, but are awaiting funds to be appropriated by congress and there are nine salmon and one crab disaster applications that are pending a disaster determination indicated by an asterisk (*). All values have been adjusted for inflation using the GDP implicit price deflator.

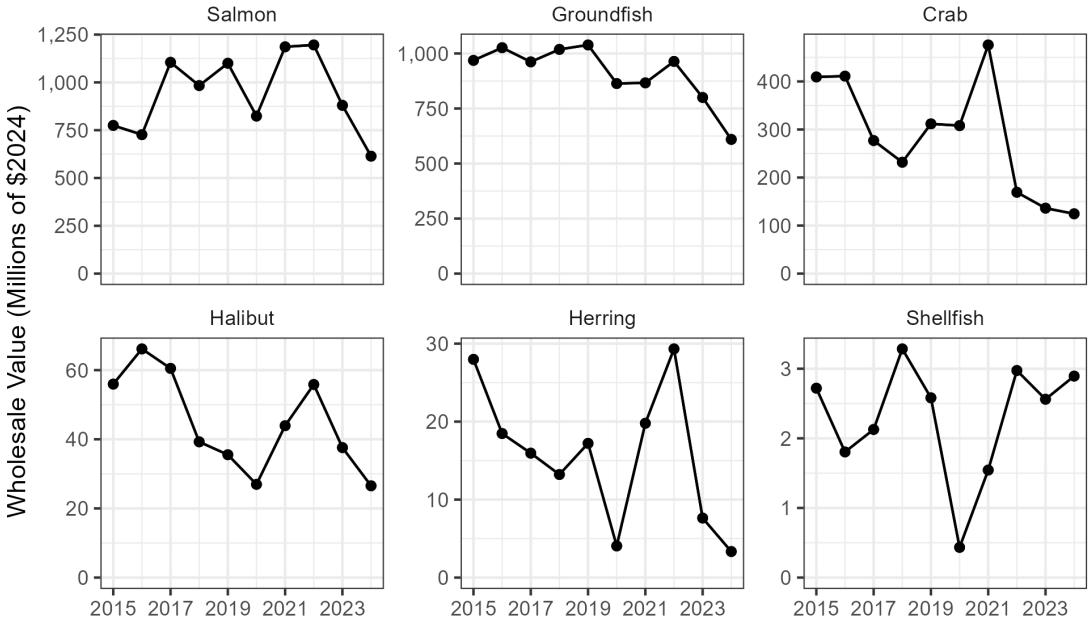
3.1.2 Wholesale Values by Species Group

Shorebased processor wholesale values, or the value of products produced by SW shorebased processors, show similar fluctuations and declines as ex-vessel values by fishery group (Figure 29). The only fishery group where wholesale values did not decrease on average between 2020 and 2024 was salmon, due to high wholesale value in 2021 and 2022, when demand and prices were high (Ess 2024). On average, the annual average wholesale value for groundfish products declined 18% from $1 billion between 2015 and 2019 to $821 million between 2020 and 2024. Crab declined 26% from $328 million to $243 million in the same period (Table 9).

Even though average salmon wholesale value held steady in recent years, the number of shorebased processors that processed salmon in the region declined from 37 to 34, reflecting differences across

salmon fisheries in the region, including sockeye salmon fishery disasters in Chignik (Ross 2022). Overall, the number of halibut processors in the region has declined the most, from roughly 18 to 11, a 36% decline, and crab processors have declined the least despite recent crab fishery disasters, declining by only 1 on average. It should be noted that because processors may purchase and process multiple species groups, these changes are not additive, and may not necessarily reflect plant closures, since processors may stop buying some species or species groups while processing others, but several plant closures have occurred. In January of 2024, Trident announced it was selling processing and related assets in Kodiak, False Pass, South Naknek, and Chignik, and scaling back winter operations in Kodiak (Bauman 2024).

Figure 29. SW Shorebased Wholesale Value by Fishery Group 2015-2024



Note: Data here include all production by processors located in SW Alaska

Source: Northern Economics Analysis based on data from CFEC (2026)

Table 9. Changes in SW Shorebased Wholesale Value and Number of Processors by Fishery Group and Period

	Average Wholesale Value (Millions of $2024)			Number of Processors		
Species Group	2015-2019	2020-2024	Percent Change	2015-2019	2020-2024	Percent Change
Salmon	937.99	939.93	0.2%	37.2	33.4	-10.2%
Groundfish	1,002.83	820.75	-18.2%	20.2	15.6	-22.8%
Crab	328.21	242.83	-26.0%	15.8	14.4	-8.9%
Halibut	51.48	38.17	-25.8%	17.8	11.4	-36.0%
Herring	18.57	12.83	-30.9%	8.4	7.4	-11.9%
Shellfish	2.50	2.08	-16.9%	12.2	9.8	-19.7%
Total	**2,341.58**	**2,056.60**	**-12.2%**	**NA**	**NA**	**NA**

Note: Total unique number of processors unable to be calculated from data provided by CFEC

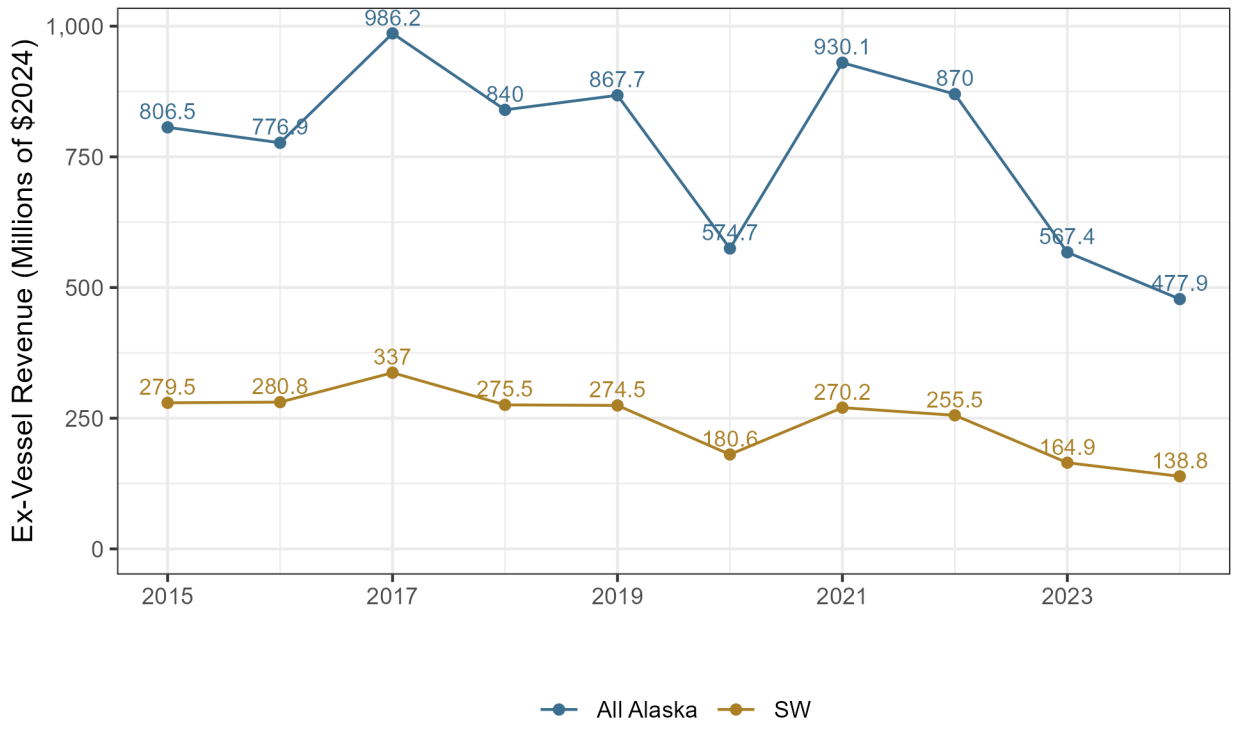
Source: Northern Economics Analysis based on data from CFEC (2026)

3.1.3 SW Resident Share of Statewide Ex-Vessel Revenue and Permits

While SW shorebased ex-vessel revenue declined by 15% on average in the last five years, SW resident permit holder earnings declined by 30% in the same time period (Table 10). SW resident earnings may have declined more for several reasons, including revenue declines in fisheries in other regions, but also through permit sales or changes in permit holder residency.

Indeed, the number of active fishing permits held by SW residents has declined by 16.8%, on average in the last five years (Table 11). However, all regions in Alaska saw net declines in active permits, ranging from an 11% decline in the Alaska Road and Railbelt, to nearly a 68% decline in the Western and Northern Alaska region. Notably, the number of active permit holders residing outside of Alaska also decreased by 17%. Given the previously discussed trends that the SW region has had a net loss of 353 people on average each year since 2020 due to outmigration, permit holder outmigration may exacerbate apparent resident revenue losses.

Figure 30. Ex-Vessel Revenue by Permit Holder Residency



Note: Residency is estimated using the permit holder registered address

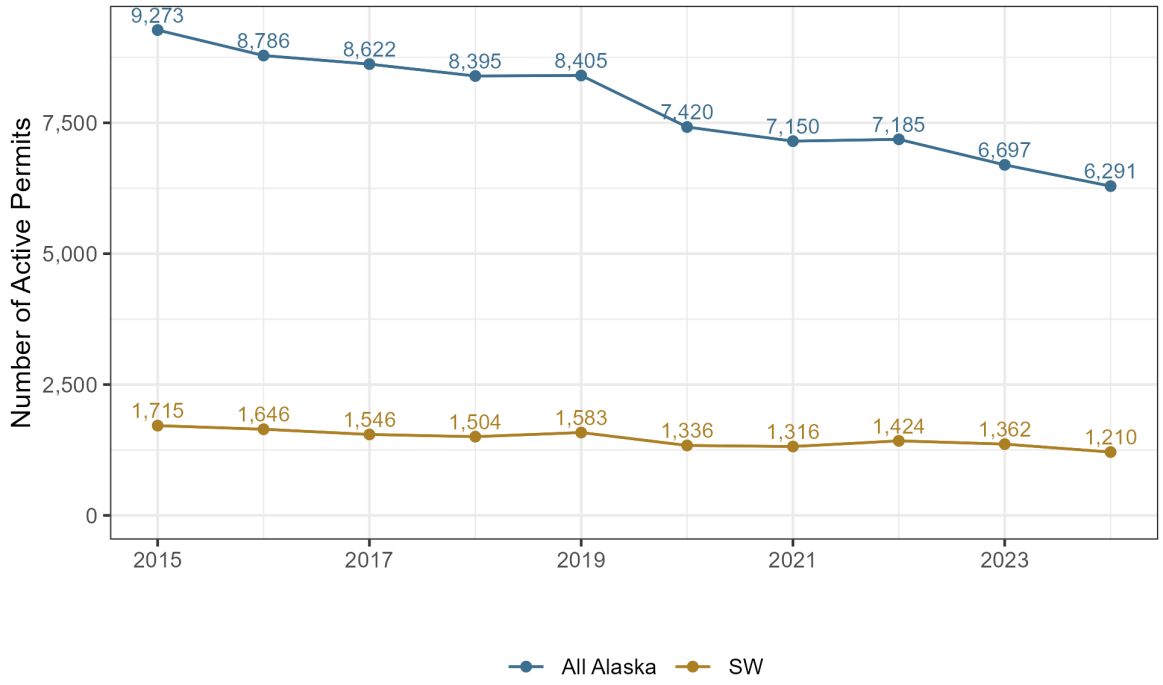
Source: Northern Economics Analysis based on data from CFEC (2026)

Table 10. Distribution of Ex-Vessel Revenue by Residency

Region	Average Ex-Vessel Revenue (millions of $2024)		Average Proportion of Ex-Vessel Revenue		Change in Ex-vessel Revenue	Change in proportion of Revenue
	2015-2019	2020-2024	2015-2019	2020-2024		
AK Road and Railbelt	315.2	270.2	14.1%	16.4%	-14.3%	16.4%
Outside Alaska	1,389.5	957.7	61.8%	58.0%	-31.1%	-6.1%
SE	227.3	200.8	10.2%	12.5%	-11.7%	23.2%
SW	289.5	202.0	12.9%	12.4%	-30.2%	-4.2%
Unknown AK	6.6	5.6	0.3%	0.3%	-15.9%	10.0%
Western and Northern Alaska	16.9	5.5	0.8%	0.3%	-67.6%	-54.7%

Source: Northern Economics Analysis based on data from CFEC (2026)

Figure 31. Number of Active Permits by Residency



Source: Northern Economics Analysis based on data from CFEC (2026)

Table 11. Distribution of Active Permits by Residency

Region	Number of Active Permits		Proportion of Active Permits		Change in Active Permits	Change in Proportion of Permits
	2015-2019	2020-2024	2015-2019	2020-2024		
AK Road and Railbelt	2,896	2,583	24.7%	27.3%	-10.8%	10.5%
Outside Alaska	3,019	2,502	25.8%	26.5%	-17.1%	2.8%
SE	3,212	2,684	27.4%	28.4%	-16.4%	3.5%
SW	1,599	1,330	13.6%	14.1%	-16.8%	3.2%
Unknown AK	42	53	0.4%	0.6%	26.7%	58.0%
Western and Northern Alaska	947	299	8.0%	3.1%	-68.4%	-61.2%

Source: Northern Economics Analysis based on data from CFEC (2026)

3.1.4 Tax Contributions by SW Fisheries

Declines in the value of SW regional fisheries not only affect those working in the industry but can significantly affect local and regional government tax revenues, as well as the state's overall budget. The State of Alaska collects taxes on various parts of the fishing industry, several of which are shared 50% with cities, municipalities, and boroughs. This includes the Fishery Business Tax (also known as the raw fish tax) as well as the Fishery Landing Tax, which are each assessed based on the unprocessed value of the resource.[4]

As a result, the amount collected in shared fishery taxes varies significantly with ex-vessel revenues, but averaged $32.5 million between 2015 and 2024, of which SW regional communities accounted for 75% or $24.6 million (Table 12). However, because taxes are assessed on a fiscal year basis, declines in tax revenues do not necessarily correspond with changes in ex-vessel revenue reported out on a calendar year basis. However, in 2024, shared fishery tax revenues dropped to their lowest levels since 2010, at $20.7 million.

Table 12. Shared Fishery Taxes ($2024)

Fiscal Year	SW	Non-SW	Total	% SW
2010	$20,026,752	$7,648,864	$27,675,617	72.4%
2011	$23,013,322	$11,820,117	$34,833,439	66.1%
2012	$25,695,540	$12,358,234	$38,053,774	67.5%
2013	$28,822,892	$11,096,807	$39,919,698	72.2%
2014	$25,486,421	$13,587,873	$39,074,294	65.2%
2015	$22,919,041	$8,822,853	$31,741,894	72.2%
2016	$24,837,110	$6,377,615	$31,214,724	79.6%
2017	$23,726,619	$8,594,124	$32,320,743	73.4%
2018	$25,583,055	$10,052,991	$35,636,047	71.8%
2019	$26,151,086	$8,441,935	$34,593,021	75.6%
2020	$21,939,281	$6,315,930	$28,255,210	77.6%
2021	$25,411,345	$8,350,928	$33,762,273	75.3%
2022	$23,861,019	$9,113,202	$32,974,221	72.4%
2023	$35,925,346	$7,973,664	$43,899,010	81.8%
2024	$15,183,635	$5,558,689	$20,742,324	73.2%
Average 2010–2014	**$24,608,985**	**$11,302,379**	**$35,911,364**	**68.7%**
Average 2015–2024	**$24,553,754**	**$7,960,193**	**$32,513,947**	**75.3%**

Source: Alaska Department of Revenue 2025

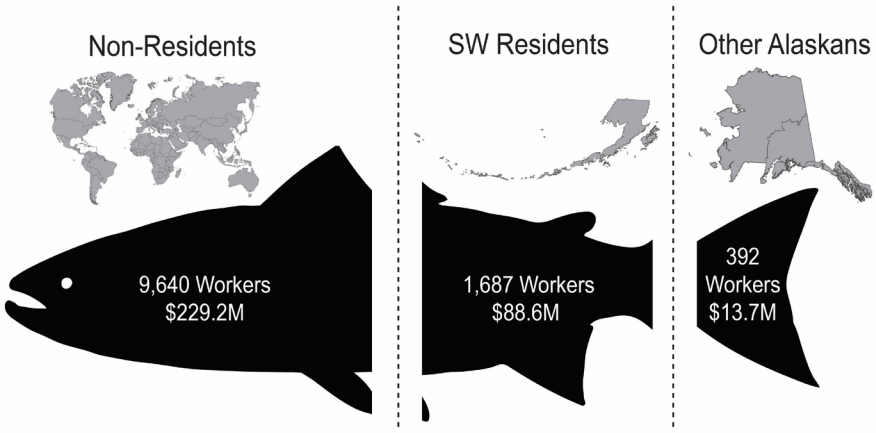
[4] The fisheries business tax is paid by a person or business that processes fish in or exports fish from Alaska and has slightly different rates depending on the facility and the species ranging from 1% to 5%. The fishery landing tax is for resources processed outside of but first landed in Alaska (primarily factory trawlers or floating processors). It is 1% for developing species and 3% for established species (Spanos, 2019)

3.2 Shorebased Fish Processing Employment

Fish harvesting jobs are just one component of the employment opportunities provided by the SW region seafood industry. Seafood processing jobs are also important sources of employment and income to thousands of SW residents, other Alaskans, and non-Alaskans. Figure 32 shows the average annual allocation of workers and wages (in 2024 dollars) across shore-based seafood processing jobs over the years 2021–2024 for residents of three regions: non-Alaska residents, SW residents, other Alaskans. Similar to previous report findings, the annual average number of non-resident workers (9,640) far outnumbers SW resident workers (1,687); however, some of this may be due to a higher rate of turnover or number of unique people, in contrast to the number of unique positions or jobs. Since the 2010–2014 report period, the total number and proportion of local resident workers have decreased (Table 13). The average number of resident workers decreased from 2,417 to 1,687 (a 30% decrease) and the proportion decreased from 19.3% of all workers to 14.4% of workers, consistent with population declines. As the number of resident workers has declined, so has the total amount paid in wages as well as the proportion of wages. Total wages paid to local residents declined from an average of $88.4 million to $86.6 million, a 2% decrease (Table 14). However, total resident wages declined less than the total number of resident workers, this signifying potential wage growth for remaining residents, similar to the trends discussed in other sectors discussed in Section 4.3.2.

Indeed, average wages per local resident worker increased from $36,566 to $51,337, a 40% increase (Table 15). While this level of wage growth is comparable to other sectors in the same time period (as discussed in Section 4.3.2), it may be affected by turnover as well as the composition of the local seafood processing labor force. Similar to past report findings, average wages per worker among SW and other Alaskan residents ($51,337 and $35,528) were higher than averages wages per worker among non-Alaskans ($23,753). Similar to the number of workers, this may be affected by a higher number of individuals holding the same position or job within a year; however, results are similar to past report findings when the number of unique jobs were estimated.

Figure 32. Average Distribution of Shore-based Seafood Processing Workers and Wages by Region of Residence, 2021-2024



Note: Wages have been adjusted for inflation and are in terms of $2024

Source: Developed by Northern Economics based on Data from ADOLWD (Kreiger 2026)

Table 13. Number of Shore-Based Seafood Processing Workers by Region of Residence

Year	Local Resident Workers	Non-local Resident Workers	Nonresident Workers	Total Workers	Local Resident % of workers
2010	2,402	599	8,972	11,973	20.1%
2011	2,526	541	9,514	12,581	20.1%
2012	2,325	815	9,471	12,611	18.4%
2013	2,282	811	9,195	12,288	18.6%
2014	2,550	598	10,090	13,238	19.3%
2021	1,680	448	9,811	11,939	14.1%
2022	1,681	443	9,838	11,962	14.1%
2023	1,704	378	9,993	12,075	14.1%
2024	1,683	299	8,916	10,898	15.4%
2010-2014	**2,417**	**673**	**9,448**	**12,538**	**19.3%**
2021-2024	**1,687**	**392**	**9,640**	**11,719**	**14.4%**

Note: Worker counts include any person who held a position in the course of a year, not unique jobs or positions

Source: Developed by Northern Economics based on data from ADOLWD (Kreiger 2026)

Table 14. Shorebased Seafood Processing Wages by Residency

	Millions of $2024				
Year	Local Resident Wages	Non- local Resident Wages	Nonresident Wages	Total Wages	Local Resident % of wages
2010	82.4	11.5	159.4	253.3	32.5%
2011	91.9	11.9	172.5	276.3	33.3%
2012	87.7	18.2	173.3	279.3	31.4%
2013	84.4	23.3	182.3	290.0	29.1%
2014	95.3	14.1	191.5	300.9	31.7%
2021	74.1	12.9	218.4	305.4	24.3%
2022	85.2	14.7	236.0	335.9	25.4%
2023	96.7	16.0	258.0	370.8	26.1%
2024	90.6	11.3	204.5	306.4	29.6%
2010-2014	**88.4**	**15.8**	**175.8**	**280.0**	**31.6%**
2021-2024	**86.6**	**13.7**	**229.2**	**329.6**	**26.3%**

Note: Wages have been adjusted for inflation and are in terms of $2024

Source: Developed by Northern Economics based on data from ADOLWD (Kreiger 2026)

Table 15. Average Wage Per Worker

Year	Local Resident Average Wages	Non-local Resident Average Wages	Nonresident Average Wages	Average Wage	Ratio of Local Resident Wage to Non-Resident
2010	$34,316	$19,136	$17,766	$21,155	1.6
2011	$36,400	$21,970	$18,127	$21,961	1.7
2012	$37,729	$22,356	$18,301	$22,145	1.7
2013	$37,001	$28,702	$19,829	$23,604	1.6
2014	$37,382	$23,657	$18,976	$22,733	1.6
2021	$44,085	$28,819	$22,259	$25,577	1.7
2022	$50,691	$33,151	$23,992	$28,083	1.8
2023	$56,753	$42,450	$25,822	$30,708	1.8
2024	$53,821	$37,690	$22,937	$28,111	1.9
2010-2014	**$36,566**	**$23,164**	**$18,600**	**$22,320**	**1.6**
2021-2024	**$51,337**	**$35,528**	**$23,753**	**$28,120**	**1.8**

Note: Wages have been adjusted for inflation and are in terms of $2024

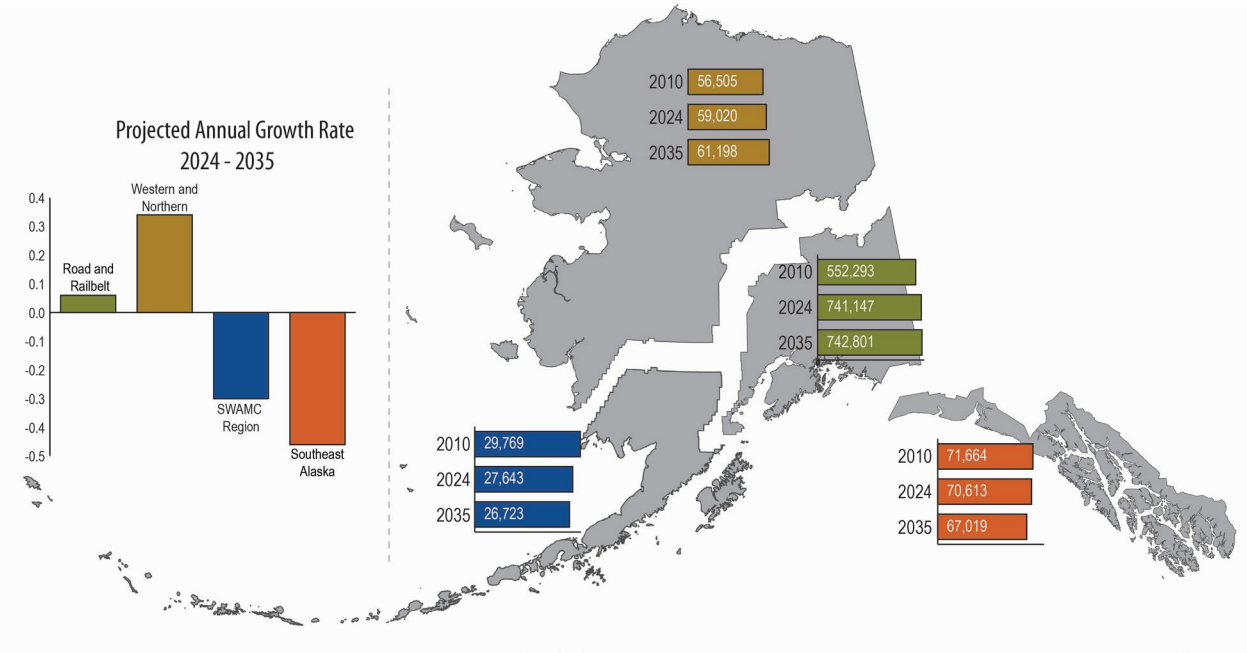
Source: Developed by Northern Economics based on data from ADOLWD (Kreiger 2026)

4 Demographics and Interregional Movements

4.1 Population

The total population across the SW region was 27,643 in 2024, or four percent of the population of the state as a whole (Figure 33). As shown in Table 16, the only regions that experienced population growth from 2010–2024 were ARR and WN. SW and SE both experienced population loss from 2010–2024, where SW had a net loss of 7.1% and SE had a net loss of 1.5%. The Alaska Department of Labor and Workforce Development (ADOLWD) has predicted that WN and ARR will experience net population gains from 2024 to 2035, with SW and SE losing population at annual average rates of around 0.3% and 0.5%, respectively. Migration and an aging population are primary drivers of population loss in rural areas (Howell 2024).

Figure 33. Historical and Forecasted Population by Region



Source: ADOLWD (2025b, 2025e, 2025f) and Northern Economics analysis.

Table 16. Historical and Projected Population by Region, 2010–2035

Year	SW	ARR	WN	SE	AK
2010	29,769	552,293	56,505	71,664	710,231
2011	30,102	561,075	58,047	73,685	722,909
2012	30,307	568,417	58,785	74,290	731,799
2013	30,154	573,059	59,963	74,532	737,708
2014	30,075	573,391	60,379	74,721	738,566
2015	29,760	574,095	61,173	74,629	739,657
2016	29,339	578,005	61,363	74,167	742,874
2017	28,992	577,531	61,556	73,430	741,509
2018	28,767	574,618	61,665	73,250	738,300
2019	28,687	572,566	61,675	73,084	736,012
2020	28,930	570,928	61,247	72,286	733,391
2021	28,625	574,719	60,258	72,709	736,311
2022	28,411	576,951	59,325	71,913	736,600
2023	27,946	580,455	59,283	71,189	738,873
2024	27,643	583,871	59,020	70,613	741,147
2025	27,884	580,158	59,460	70,863	738,365
2030	27,300	585,938	60,365	69,155	742,758
2035	26,723	587,861	61,198	67,019	742,801
2010–2024 Change	**-7.1%**	**5.7%**	**4.5%**	**-1.5%**	**4.4%**
2024–2035 Change	**-3.3%**	**0.7%**	**3.7%**	**-5.1%**	**0.2%**

Sources: ADOLWD (2025b, 2025e, 2025f) and Northern Economics analysis.

Across the state as a whole, white residents were the largest racial group in 2024 (63.9% of the population), followed by those self-identifying as Alaska Native or American Indian (15.5%), two or more races (8.2%), Asian (7.0%), black or African American (3.7%), and Native Hawaiian or other Pacific Islander (1.8%) (ADOLWD 2025c). In addition, 7.7% of Alaska residents self-identified as Latino or Hispanic origin in 2024.

The four regions are variable with respect to racial and ethnic composition. In 2024, white residents made up 38.2% of the SW population, followed by those who self-identified as Asian (24.3%), Alaska Native and American Indian (23.9%), two or more races (8.2%), black and African American (4.0%), and Native Hawaiian or other Pacific Islander (1.4%). However, WN provides an example of a completely different racial and ethnic composition with 76.6% of the population that self-identified as Alaska Native and American Indian in 2024. Racial composition at the community level varies significantly from the regional profile, with many SW region communities having majority populations of Alaska Native or Alaska Native in combination with one or more additional races.

Table 17 shows the racial and ethnic makeup of SW residents compared with Alaska residents in 2010 and in 2024. Since 2010, SW has had more changes in racial composition compared with Alaska as a whole. Unlike in 2010, the Asian-alone population in SW is now slightly larger than the Alaska

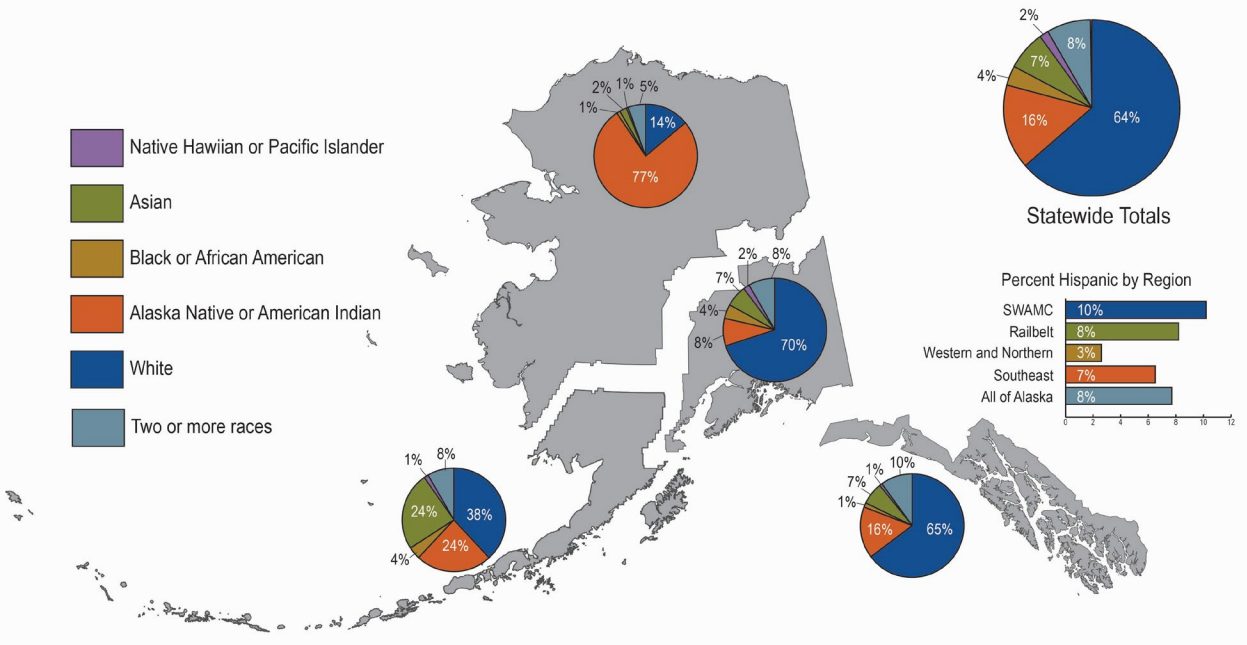
Native and American Indian-alone population. This shift happened between 2020 and 2021, when the Alaska Native and American Indian population share dropped from 28.8% to 25.1%, and the Asian population share grew from 18.1% to 23.7%. Additionally, there were increases in the shares of the population identifying as all races other than white and Alaska Native and American Indian as well as people identifying as Latino or of Hispanic origin regardless of race. Similar to SW, AK saw a decrease in the share of people identifying as white. However, the Alaska Native and American Indian share of the population grew by 0.5% in Alaska as a whole while it shrank by 4.6% in SW.

Table 17. Racial and Ethnic Composition of SW and AK, 2010 and 2024

	SW			AK		
Race/Ethnicity	2010	2024	Change	2010	2024	Change
White	42.7%	38.2%	-4.5%	68.1%	63.9%	-4.2%
Alaska Native and American Indian	28.5%	23.9%	-4.6%	15.0%	15.5%	0.5%
Black and African American	2.3%	4.0%	1.6%	3.4%	3.7%	0.3%
Asian	18.7%	24.3%	5.7%	5.5%	7.0%	1.5%
Native Hawaiian or Other Pacific Islander	0.8%	1.4%	0.6%	1.1%	1.8%	0.7%
Two or More Races	7.1%	8.2%	1.2%	6.9%	8.2%	1.3%
Hispanic Origin of any race	7.7%	10.2%	2.5%	5.5%	7.7%	2.1%

Source: ADOLWD (2025c, 2025d) and Northern Economics analysis.

Figure 34. Ethnic and Racial Composition by Region, 2024

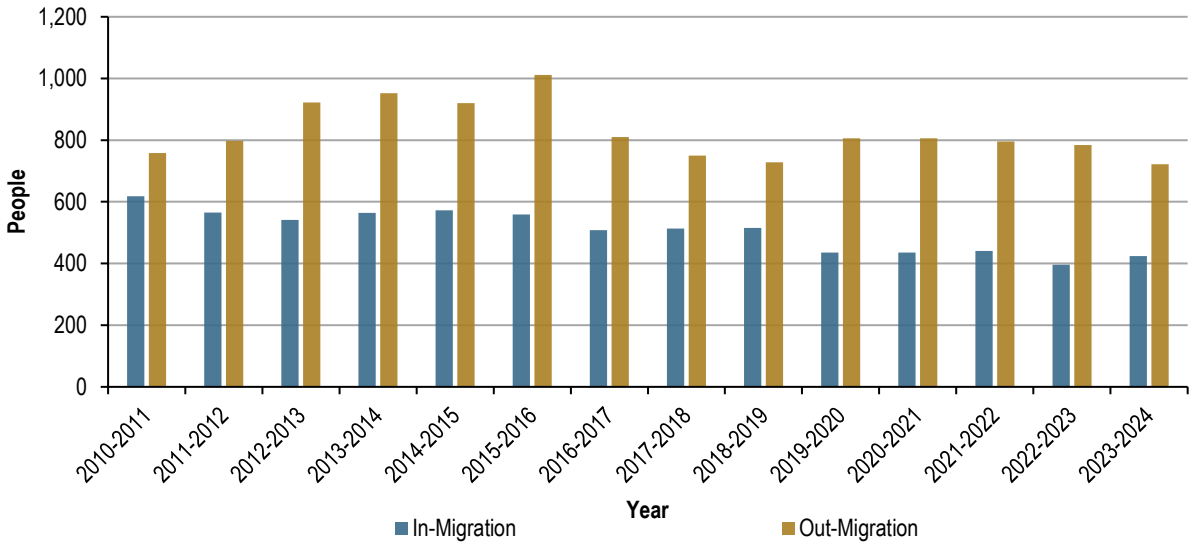


Source: ADOLWD (2025c, 2025d) and Northern Economics analysis.

4.2 Migration Patterns

Interregional migration patterns help explain the realized and forecasted net declines in the SW population. Data in this section are based on annual applications for the Alaska Permanent Fund Dividend (PFD). For PFD eligibility, applicants must meet several criteria, including residence in Alaska for the previous calendar year, or birth in Alaska in the previous calendar year.[5] Since 2010, more people have been moving out of SW to the three other regions compared to the number of people moving to SW. Net population loss as a percentage of population size increased from 0.9 percent on average from 2010–2014 to 1.3 percent from 2020–2024. That is, annual population loss has not decreased in proportion to the falling population size. Figure 35 illustrates the gap between in-migration to SW and out-migration from SW. Additionally, Table 18 and Table 19 break down where people are coming from and where they are going. Average annual net population loss to elsewhere in Alaska for SW from 2010 to 2014 was 286 people, which has increased in recent years and averaged 353 people between 2020 and 2024. Despite net interregional outmigration between 2010 and 2014, as discussed in the previous section, the SW population increased during that period (Table 16). This illustrates that while interregional migration is one aspect of what can affect population levels, it is not the only factor. Other factors include out of state or international migration, or natural population growth (including the birth rate and death rate).

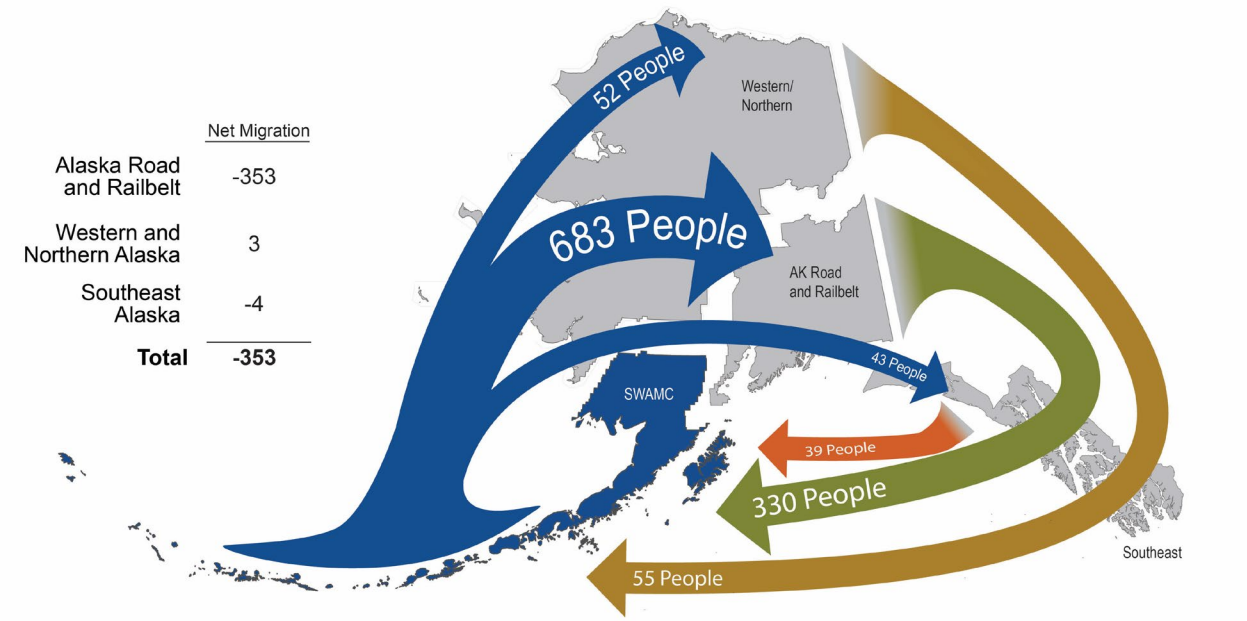
Figure 35. Annual SW Region In-Migration and Out-Migration from Elsewhere in Alaska, 2010–2024



Note: This figure only is capturing migration within Alaska, and does not include in-migration or out-migration from beyond Alaska.
Source: ADOLWD (2025a) and Northern Economics analysis.

[5] Due to the requirement of residency for a complete calendar year before becoming eligible for the PFD, new residents who move to Alaska from out of state will not be counted until the second year that they live in Alaska, causing a lag in when migration is recorded for this group of people. For example, if someone moved from out of state to the SW in 2023, they would not be eligible for the PFD for 1 calendar year from their moving date, meaning they would not be counted in migration statistics until 2024 or 2025, depending on what time of year they moved. Additionally, unlike previous versions of this dataset, the current dataset used in this analysis was not adjusted for births and deaths.

Figure 36. Average Annual In- and Out-Migration Between SW and Elsewhere in Alaska, 2020–2024



Note: This figure only is capturing migration within Alaska, and does not include in-migration or out-migration from beyond Alaska.
Source: ADOLWD (2025a) and Northern Economics analysis.

Table 18. Annual In-Migration to SW, 2010–2024

Year	From			
	ARR	SE	WN	Total
2010–2011	490	51	77	618
2011–2012	469	45	51	565
2012–2013	438	47	56	541
2013–2014	465	37	62	564
2014–2015	486	33	54	573
2015–2016	417	55	87	559
2016–2017	431	32	45	508
2017–2018	403	33	77	513
2018–2019	403	33	79	515
2019–2020	327	48	60	435
2020–2021	327	48	60	435
2021–2022	328	42	71	441
2022–2023	324	34	38	396
2023–2024	342	33	49	424
Average, 2010–2014	**466**	**45**	**62**	**572**
Average, 2020–2024	**330**	**39**	**55**	**424**

Note: This figure only is capturing migration within Alaska, and does not include in-migration or out-migration from beyond Alaska.
Source: ADOLWD (2025a) and Northern Economics analysis.

Table 19. Annual Out-Migration from SW, 2010–2024

	To			
Year	ARR	SE	WN	Total
2010–2011	637	54	67	758
2011–2012	672	58	68	798
2012–2013	802	51	69	922
2013–2014	830	53	69	952
2014–2015	789	70	61	920
2015–2016	900	63	48	1,011
2016–2017	699	52	59	810
2017–2018	646	42	62	750
2018–2019	609	48	71	728
2019–2020	697	54	55	806
2020–2021	697	54	55	806
2021–2022	719	26	51	796
2022–2023	680	50	54	784
2023–2024	635	41	46	722
Average, 2010–2014	**735**	**54**	**68**	**858**
Average, 2020–2024	**683**	**43**	**52**	**777**

Note: This figure only is capturing migration within Alaska, and does not include in-migration or out-migration from beyond Alaska.
Source: ADOLWD (2025a) and Northern Economics analysis

Most people moving to SW from elsewhere in Alaska came from ARR, which accounted for 81.4% of in-migration on average from 2010–2014, and 77.9% from 2020 to 2024. People moving to ARR account for most out-migration on average (85.7% from 2010 to 2014 and 87.9% from 2020 to 2024). Table 20 shows the annual average difference between in-migration and out-migration between SW and other regions. Interestingly, in recent years ARR is the only region where the gap between out-migration and in-migration grew. There were 353 more out-migrants than in-migrants on average between 2020 and 2024, compared to 270 on average between 2010 and 2014. Historically, net migration between SW and SE was a small loss for SW, but in recent years net migration shifted even closer to net zero. Finally, WN is the only region where the gap between in-migration and out-migration with SW indicated more people coming to SW annually on average than leaving between 2020 to 2024. This is a recent change in the migration dynamics between SW and WN—like other regions, between 2010 and 2014, more people left SW for WN than came to SW from WN annually on average.

Table 20. Average Annual Difference Between In- and Out-Migration, SW, 2010–2014 & 2020–2024

Years	ARR	SE	WN
2010–2014	-270	-9	-7
2020–2024	-353	-4	3

Note: This figure only is capturing migration within Alaska, and does not include in-migration or out-migration from beyond Alaska.
Source: ADOWLD (2025a) and Northern Economics analysis.

While interregional migration within Alaska is one aspect of what is driving predicted net population losses, it alone is not the full picture. Other influences include other components of population change, such as migratory flows between SW and other states and foreign countries, birth rates, and the age composition of the region's residents.

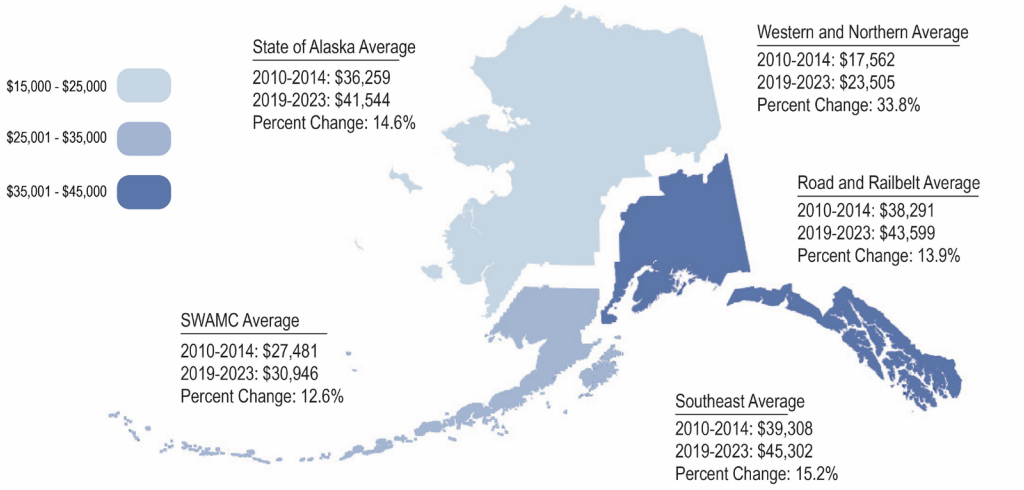
An Alaska Economic Trends article published in 2024 offers some insight into migration and population trends (Howell 2024). Natural increase in some rural areas historically compensated for net migration losses, but that has not been true in recent years as the Alaska population is aging. Specifically, from 2020 to 2023, population losses in multiple rural parts of the state, including the Northern and Southwestern parts of the state have accelerated.

4.3 Income

4.3.1 Average Per Capita Income by Place of Residence

Income in this section is derived using U.S. Census Bureau 5-year average total aggregate household income data and ADOLWD population data. Aggregate household income includes wage and salary employment as well as self-employment income, among others.[6] On average, between 2019 and 2023 SW per capita income was $30,456. In the same period, per capita income was highest in SE at $45,302, followed closely by ARR ($43,599, Figure 37). The WN region has the lowest per capita income ($23,505).

Figure 37. Average per Capita Income by Region and SW Borough/Census Area of Residence, 2019–2023

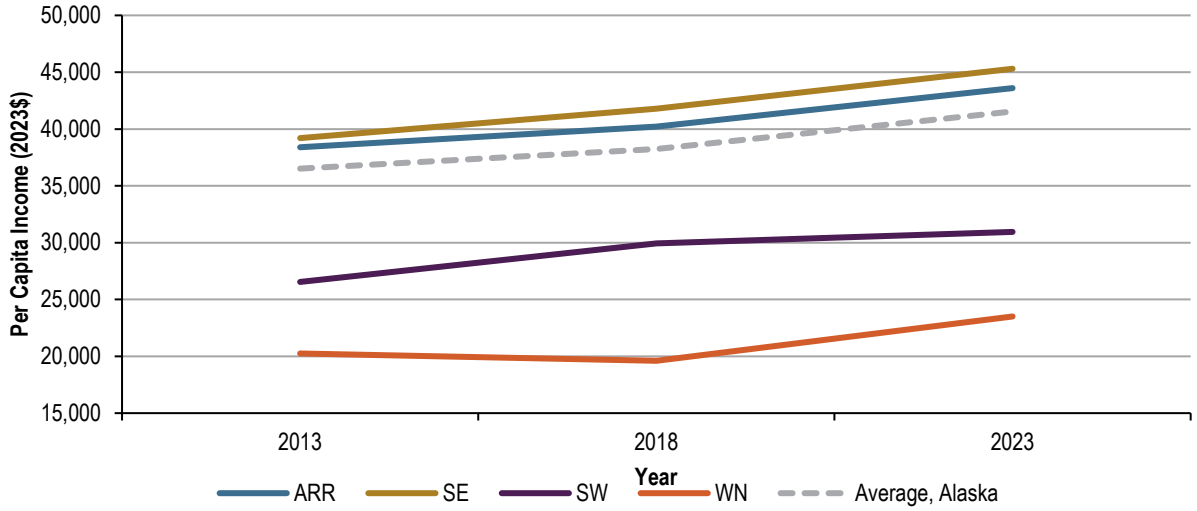


Source: Developed by Northern Economics based on data from USCB (2025) and ADOLWD (2025d and 2025g).

[6] USCB measures of income includes self-reported amounts for major sources of income, including wage or salary income; net self-employment income; interest, dividends, or net rental or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income. It does not include capital gains, or money received from the sale of property (unless the recipient was engaged in the business of selling such property), which other measures of income, such as from the Bureau of Economic Analysis, do include, which contributes in part to BEA estimates generally being higher.

Table 21 and Figure 38 show how per capita personal income has changed over time by region. Income across all Alaska residents has grown by 14.6% from the 5-year average in 2014 to the 5-year average in 2023. Over the same period, the region with the greatest percent change was WN (33.8% increase), followed by SE (15.2%), ARR (13.9%), and SW (12.6%).

Figure 38. Per Capita Personal Income by Region, 2013, 2018, and 2023 5-Year Averages (2023 dollars)



Source: Developed by Northern Economics based on data from USCB (2025) and ADOLWD (2025d and 2025g).

Table 21. Per Capita Personal Income by Region Change Over Time (2023 dollars)

Region	5-Year Average, 2010–2014	5-Year Average, 2019–2023	% Change
ARR	38,291	43,599	+13.9%
SE	39,308	45,302	+15.2%
SW	27,481	30,946	+12.6%
WN	17,562	23,505	+33.8%
Average, Alaska	**36,259**	**41,544**	**+14.6%**

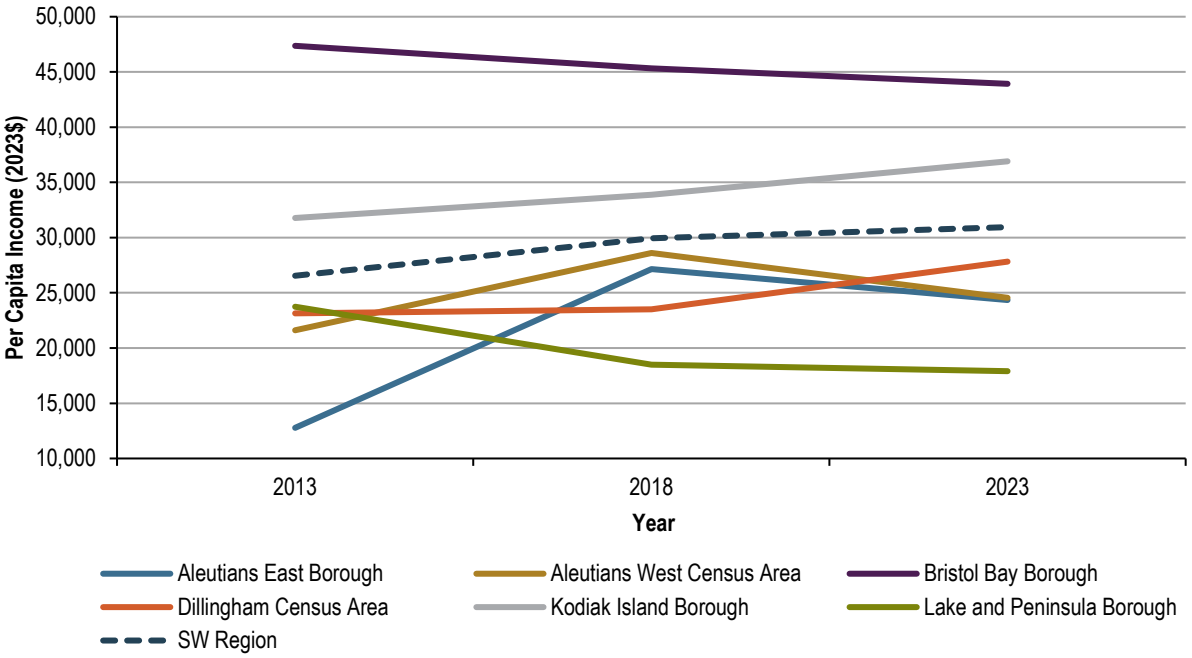
Source: Developed by Northern Economics based on data from USCB (2025) and ADOLWD (2025d and 2025g).

Each borough/census area in the SW region varied in terms of real per capita income change from 2010 to 2023 (see Figure 39 and Table 22). In 2023, average per capita income across all of Alaska was $41,544, which was 25.5% more than SW. SW's per capita income growth was the lowest of any region in AK when comparing the 2014 5-year average and the 2023 5-year average.

Average per capita income was variable across SW's constituent boroughs and census areas. Residents of Bristol Bay Borough enjoyed the highest per capita income as of 2023, at $43,924. Average annual per capita among the other constituent boroughs and census areas ranged from $17,905 to $36,906. Additionally, the average per capita income in the Bristol Bay Borough is also higher than Alaska as a whole. While income in Bristol Bay Borough has historically been high relative to Alaska and elsewhere in SW, the gap has shrunk since the early 2010s. Multiple factors contribute to Bristol Bay Borough's high income (Fried 2023). First, Bristol Bay Borough is in the center of the

largest and most lucrative commercial salmon fisheries (discussed in more detail earlier in Section 3). Second, Bristol Bay Borough's median age is early 40s, which is typically an age range where people are at peak earnings within their chosen career. Additionally, this median age also means a large share of the Bristol Bay population is in the labor force.

Figure 39. Per Capita Personal Income by SW Borough/Census Area, 2013, 2018, and 2023 (2023 dollars)



Source: Developed by Northern Economics based on data from USCB (2025) and ADOLWD (2025d and 2025g).

Table 22 shows how per capita income has changed over time in SW constituent boroughs. Comparing SW 5-year annual average per capita income data from 2013 to 2023, income has grown in SW by 16.6%. Over the same period, Aleutians East Borough had the largest increase in personal income (90.6%), followed by Dillingham Census Area (20.2%), Kodiak Island Borough (16.1%), and Aleutians West Census Area (13.6%). Bristol Bay Borough as well as Lake and Peninsula Borough experienced decreases in personal income (-7.3% and -24.6% respectively).

Table 22. Per Capita Personal Income by SW Borough/Census Area Change Over Time (2023 dollars)

Region	Average, 2010–2014	Average, 2019–2023	% Change
Aleutians East Borough	$15,540	$24,351	+56.7%
Aleutians West CA	$23,645	$24,540	+3.8%
Bristol Bay Borough	$48,331	$43,924	-9.1%
Dillingham CA	$22,465	$27,824	+23.9%
Kodiak Island Borough	$32,565	$36,906	+13.3%
Lake and Peninsula Borough	$23,071	$17,905	-22.4%
SW Region	**$27,481**	**$41,544**	**+12.6%**

Source: Developed by Northern Economics based on data from (USCB 2025) and ADOLWD (2025d and 2025g).

4.3.2 Average Annual Wages by Sector of Employment and Place of Residence

Table 23 provides average annual wages for employees of each sector in each of the four Alaska regions and the state as a whole for the 2018–2022 period.[7,8] Across the state as a whole, individuals employed in the Federal Government sector enjoyed the highest average wages, followed by those in State and Local Government as well as Resource Extraction and Manufacturing (which includes seafood harvesting and processing jobs). Employees in all three of these sectors enjoyed average annual wages of over $100,000 per year (in 2023 dollars). Federal Government employees followed by State and Local Government employees were also the highest earners on average in SW. Similar to AK, employees of these government sectors in SW were earning over $100,000 in annual wages on average. However, unlike AK, the third highest earning sector in SW was Transportation and Utilities, where employees were earning an average annual wage of $74,832. The region that was least similar to AK and the other regions was WN. WN was the only region where jobs in the Federal Government sector were not the highest paying jobs in the region. In WN, the highest average wages were earned in the Transportation and Utilities sector, followed by State and Local Government, and Construction.

Table 23. Average Annual Wages by Sector and Region of Residence, 2018–2022 (2023 dollars)

Sector	AK	ARR	SE	SW	WN
Accommodations, Food Services, Arts & Entertainment	$31,564	$31,333	$28,942	$34,059	$21,991
Construction	$79,235	$85,303	$59,529	$65,225	$86,254
Federal Government	$110,720	$111,531	$121,935	$107,051	$67,574
Healthcare and Social Assistance	$74,124	$73,300	$63,328	–*	–*
Other Services	$39,307	$38,774	$41,645	$31,083	$61,084
Professional Management and Financial Services	$53,018	$56,229	$35,986	$41,891	$48,072
Resource Extraction and Manufacturing	$106,010	$88,852	$72,191	$68,656	–*
State and Local Government	$109,871	$109,003	$113,573	$102,016	$88,140
Transportation and Utilities	$89,483	$92,526	$67,398	$74,832	$104,311
Wholesale and Retail Trade	$47,137	$50,166	$38,768	$35,674	$35,897

**Note: These values could not be calculated because the BEA data set either had to conceal some data to protect confidentiality or not all the data were available for some of the constituent boroughs and census areas.*

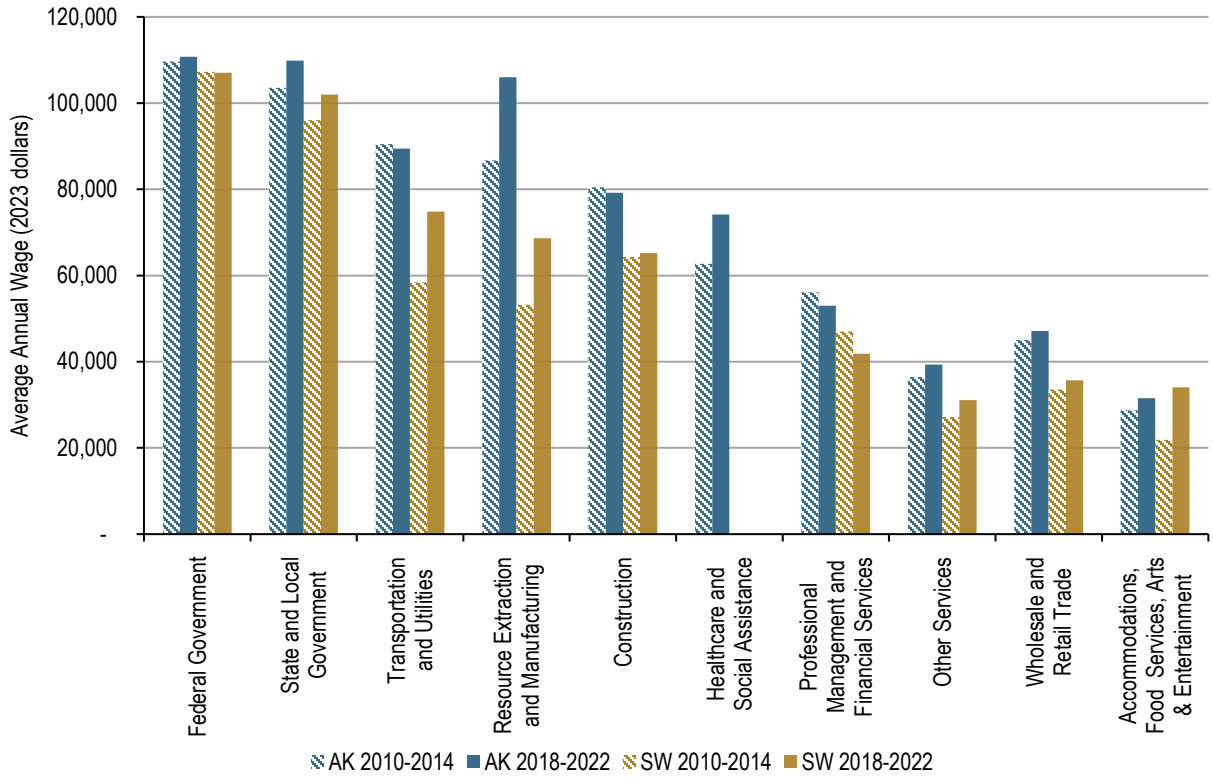
Source: Developed by Northern Economics based on data from BEA (2025b, 2025c) and ADOLWD (2025g).

Figure 40 and Table 24 offer insight into how average annual wages by sector and region of residence have changed over time. Both offer a comparison between the 2010–2014 5-year average wage and the 2018–2022 5-year average wage.

[7] 2018–2022 was used because it is the most recent 5-year period with data available for the specific datasets necessary to create this table. One of the underlying datasets necessary to generate the data reported in the table was discontinued in 2022.

[8] The sector list reported in this section was developed by Northern Economics specifically for this study and may be inconsistent with other economic reports and analyses.

Figure 40. Average Annual Wages by Sector and Region of Residence, AK & SW, 2010–2014 versus 2018–2022 (2023 dollars)



Note: There was insufficient data for the healthcare and social assistance sector in SW

Source: Developed by Northern Economics based on data from BEA (2025b, 2025c) and ADOLWD (2025g).

Table 24. Total Percentage Change in 5-Year Average Annual Wages by Sector and Region of Residence, 2010–2014 versus 2018–2022

Sector	AK	ARR	SE	SW	WN
Accommodations, Food Services, Arts & Entertainment	9.8%	7.9%	14.1%	55.7%	-28.6%
Construction	-1.5%	0.9%	-3.4%	1.5%	7.1%
Federal Government	1.0%	1.1%	-0.5%	-0.2%	4.7%
Healthcare and Social Assistance	18.2%	16.2%	20.4%	NA	NA
Other Services	7.8%	5.1%	21.7%	14.6%	42.5%
Professional Management and Financial Services	-5.5%	-5.2%	-5.3%	-10.9%	-1.9%
Resource Extraction and Manufacturing	22.3%	-6.8%	75.3%	29.0%	NA
State and Local Government	6.1%	5.4%	4.0%	6.2%	11.5%
Transportation and Utilities	-1.1%	-5.2%	7.0%	28.1%	35.5%
Wholesale and Retail Trade	4.7%	4.6%	3.4%	6.2%	0.6%

Note: Resource Extraction and Manufacturing includes seafood harvesting and processing income

Source: Developed by Northern Economics based on data from BEA (2025b, 2025c) and ADOLWD (2025g).

Within SW, government jobs historically have been and still remain the highest paid positions on average. However, after adjusting for inflation, wage growth in these positions has been relatively flat. Construction used to be the third highest paid sector in SW, but wage growth has been flat in the sector (1.5% total), and it has fallen to the fifth highest paid sector in recent years. Transportation and utilities as well as resource extraction and manufacturing sectors have seen enough wage growth to move ahead of construction in recent years, growing 28.1% and 29.0%, respectively.

The accommodations, food services, arts & entertainment sector experienced the most growth in SW (55.7%), followed by resource extraction and manufacturing (29.0%) and transportation and utilities (28.1%). Growth in the accommodations, food services, arts & entertainment sector is likely driven by growth in tourism and visitation to the SW region. Two sectors in SW reported decreases in average wages: professional management and financial services (-10.9%) and federal government (-0.2%). There were not enough data available for BEA to publish healthcare and social assistance wage data for all years in SW, which is a limitation of this analysis. Within AK, the sectors with the most wage growth were resource extraction and manufacturing (22.3%), healthcare and social assistance (18.2%), and accommodations, food services, arts & entertainment (9.8%). Three sectors in AK reported decreases in average wages: professional management and financial services (-5.5%), construction (-1.5%), and transportation and utilities (-1.1%).

As can be seen in Figure 40, SW and AK are generally similar as far as which sectors pay the highest average wages and how wages are changing over time (increasing, decreasing, or remaining steady). However, there are two exceptions to their general alignment. First, while SW and AK generally are in alignment for how wages are changing over time, the magnitude of the change was often larger for the same sector in SW relative to AK. For example, wages increased in the accommodations, food services, arts & entertainment sector in AK and SW, but AK increased by 9.8% while SW increased by 55.7%. The same was true for other services, professional management and financial services, resource extraction and manufacturing, and wholesale and retail trade. Second, there was substantial wage growth in the transportation and utilities sector in SW (+28.1%) while wages shrank in AK (1.1%).

4.4 Employment Overview

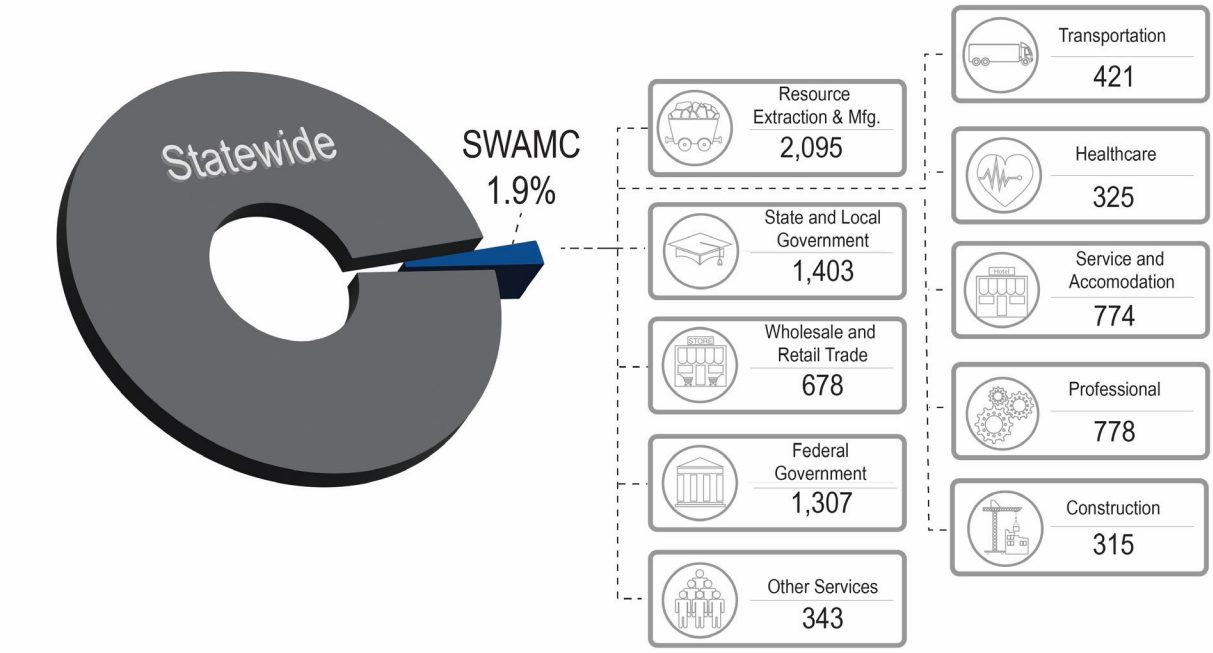
4.4.1 Employment by Region of Residence

SW residents held roughly 1.9% of all jobs held by Alaskans over the years 2018–2022, as reported by the BEA. Importantly, the BEA's job counts are by place of residence, regardless of job location, and consider jobs of all types—full-time, part-time, seasonal, etc.—equally as one job each. In addition, an individual may hold multiple jobs in a single year, with each job counted separately. Figure 41 shows SW residents' share of all jobs held by Alaskans over the five-year period ending in 2022, as well as the average annual distribution of these jobs across 10 broad sectors. Notably, the Resource Extraction and Manufacturing sector was the largest industry in SW by average

employment, providing 24.8% of total jobs in SW. The next largest sector by resident employment in SW is State and Local Government, which accounts for 16.6% of employment in SW. Additionally, Resource Extraction and Manufacturing jobs in SW account for 6.1% of all Resource Extraction and Manufacturing jobs in AK.

As previously mentioned, the Resource Extraction and Manufacturing sector includes seafood harvesting and manufacturing employees. However, it is likely that seafood harvesting jobs are understated in the BEA counts, since these jobs are seldom reported for fishermen who do not receive a W-2 or 1099. Northern Economics has not augmented the BEA estimates with independent estimates of fish harvesting workers. Thus, the importance of this sector as a source of employment for residents of SW is even greater than is suggested by BEA data. Taken together, the government sector was the second largest sector by employment, including federal, state and local government, and it accounted for 32.1% of employment in SW.

Figure 41. Average Annual Employment of SW Residents by Sector, 2018–2022



Note: Fish harvesting and processing employment is likely underestimated since self-employed workers are not included.
Source: Developed by Northern Economics based on data from BEA (2025c).

SW residents' employment within the Resource Extraction and Manufacturing sector from 2018–2022 was disproportionately high relative to the region's population. Resource Extraction and Manufacturing had an annual average of 2,095 jobs and 6.1% of jobs statewide in the sector while only being home to 3.9% of the state's population. Resource extraction and manufacturing was the only sector during these years that was overrepresented relative to the population.

Between 2018 and 2022, total employment shrank by an annual average of -0.6% in SW, which was the smallest loss among the three out of four regions with reductions in total employment from 2018 to 2022. Meanwhile, average annual growth in total employment was 0.2% in AK. The only region that experienced average annual growth in total employment was ARR at 2.2%. WN had the largest average annual losses in total employment at -2.7%.

Table 25. Average Annual Employment by Sector and Region of Residence, 2018–2022

Sector	AK	ARR	SE	SW	WN	SW % of Total
Accommodations, Food Services, Arts & Entertainment	43,608	30,568	3,825	774	222	1.8
Construction	23,327	17,653	1,823	315	123	1.4
Federal Government	41,672	35,433	2,147	1,307	302	3.1
Healthcare and Social Assistance	58,520	42,965	3,609	325	35	0.6
Other Services	20,509	14,366	1,658	343	495	1.7
Professional Management and Financial Services	79,938	60,827	5,514	778	559	1.0
Resource Extraction and Manufacturing	34,533	11,520	2,269	2,095	606	6.1
State and Local Government	60,374	16,578	9,328	1,403	3,914	2.3
Transportation and Utilities	28,856	21,048	2,413	421	320	1.5
Wholesale and Retail Trade	50,435	36,874	4,095	678	867	1.3
Total	**441,772**	**287,832**	**36,681**	**8,439**	**7,443**	**1.9**
Avg Annual Growth in Total Employment, 2018–2022	**0.2%**	**2.2%**	**-1.2%**	**-0.6%**	**-2.7%**	

Note: Non-disclosed employment is excluded.

Source: Developed by Northern Economics based on data from BEA (2025c).

Table 26. Average Annual Employment by Sector and Region of Residence, 2010–2014

Sector	AK	ARR	SE	SW	WN	SW % of Total
Accommodations, Food Services, Arts & Entertainment	43,052	29,720	3,832	698	594	1.6
Construction	24,372	17,948	2,068	332	160	1.4
Federal Government	42,840	36,068	2,343	1,424	310	3.3
Healthcare and Social Assistance	53,764	39,148	3,692	476	422	0.9
Other Services	19,976	14,018	1,629	410	430	2.1
Professional Management and Financial Services	78,961	60,168	4,514	848	473	1.1
Resource Extraction and Manufacturing	47,686	13,518	2,228	3,494	688	7.3
State and Local Government	63,721	13,726	9,741	1,299	4,225	2.0
Transportation and Utilities	25,106	17,286	2,192	482	561	1.9
Wholesale and Retail Trade	51,997	37,882	4,696	703	750	1.4
Total	**451,475**	**279,482**	**36,935**	**10,166**	**8,613**	**2.3**
Avg Annual Growth in Total Employment, 2010–2014	**1.0%**	**0.9%**	**1.0%**	**3.6%**	**-1.6%**	

Note: Non-disclosed employment is excluded.

Source: Developed by Northern Economics based on data from BEA (2025). BEA. 2025. Total full-time and part-time employment by industry. https://apps.bea.gov/regional/histdata/releases/1123lapi/CAEMP25N.zip. Accessed December 11, 2025.

In recent years, the total number of jobs held by Alaskan residents has declined relative to the early 2010s (441,772 jobs versus 451,475 jobs). Additionally, SW residents in recent years have had an average of 8,439 jobs compared with 10,166 in the early 2010s. Unlike in recent years, between 2010 and 2014, average annual employment was growing in all Alaska regions except for WN. In the early 2010s, SW residents held 2.3% of all Alaskan jobs, which has declined to 1.9% in recent years.

Similar to the 2018–2022 period, between 2010 and 2014 Resource Extraction and Manufacturing was a key sector for SW (Table 26). On average during the 2010–2014 period, the Resource Extraction and Manufacturing sector provided jobs for 3,494 SW residents, which was 34.4% of all jobs held by SW residents and 7.3% of all Resource Extraction and Manufacturing jobs held by Alaskans. While Resource Extraction and Manufacturing is still the largest sector by total employment in SW, it supported fewer total jobs for residents on average in 2018–2022 than in 2010–2014 (2,095 recently versus 3,494 historically) and it made up a smaller share of all jobs held by SW residents (24.8% recently versus 34.4% historically). Additionally, in recent years the share of jobs in SW within the government sector has grown from 26.8% in the early 2010s to 32.1% on average between 2018 and 2022. This growth has been driven by losses in other sectors, including some losses in average Federal Government employment, and gains in the State and Local Government sector.

4.4.2 Employment by Place of Work

In contrast to the BEA, the Bureau of Labor Statistics (BLS) tracks employment by place of work, largely through the Quarterly Census of Employment and Wages (QCEW)[9]. QCEW data are tabulations of monthly employment and quarterly wages of workers who are covered by state unemployment insurance programs or by the unemployment insurance programs for federal employees. Importantly, QCEW excludes members of the armed forces, the self-employed, proprietors, domestic workers, and a few other job categories. The exclusion of the self-employed and proprietors is an important consideration because of the high number of jobs, including commercial fishing crew, in SW fisheries that fit into these two categories. The QCEW's understatement of fish harvesting jobs is exhibited by its reporting of an average annual job total of 39 for Kodiak Island Borough's Fishing, Hunting, and Trapping sector in 2023 (BLS 2025).[10] For sectors other than Resource Extraction and Manufacturing, however, QCEW job counts allow for comparison of region-specific contributions to employment totals.

Unsurprisingly, ARR is the largest employer by place of work across all sectors, as shown in Table 27 and Figure 42. Further, excluding self-employment and proprietorship totals, regional QCEW job counts aggregated across all sectors indicate that jobs located within SW accounted for 4.7% of all

[9] ADOLWD employment estimates generally rely on QCEW data and correspond more closely to BLS data than BEA data.

[10] While commercial crew licenses collect information on residency, they do not collect information on the fisheries that the crewmembers are participating in or other information that would enable identification of how many crew are based in any given region.

jobs held statewide over the years 2019–2023.[11] Figure 42 shows how total employment by region has changed since 2010. Total employment regardless of sector peaked in AK in 2015 at 331,682 jobs but peaked one year later in 2016 in SW at 16,000 jobs. As can be seen in Figure 42, all regions generally follow similar trends except for WN.

Resource Extraction and Manufacturing accounts for the largest share of jobs performed in SW of any sector, both historically and recently (39.5%). Additionally, Resource Extraction and Manufacturing jobs performed in SW account for 22.8% of all Resource Extraction and Manufacturing jobs performed in Alaska. The next largest sector is State and Local Government, which accounts for 19.9% of jobs in SW, and 5.0% of all State and Local Government jobs held in AK. The share of Resource Extraction and Manufacturing positions in SW has grown substantially from 2010 to 2023, increasing by 6.6%.

Additionally, Table 28 shows how jobs performed in SW have changed over time from 2010 to 2023, both in terms of the number of jobs being performed by sector (Change in Jobs %), and the change in the share of jobs in SW relative to AK by sector (Change in SW Share of AK [%]). Resource Extraction and Manufacturing had the largest increase in the number of jobs located in SW as well as the share of all jobs in that sector in AK (26.3% increase and 6.6% increase).

Table 27. Average Employment by Sector and Region of Work, 2019–2023, Excluding 2020

	Region of Work					
Sector	AK	ARR	SE	SW	WN	Unknown
Accommodations, Food Services, Arts & Entertainment	34,138	28,328	3,970	864	928	6
Construction	16,384	14,108	1,355	235	252	79
Federal Government	15,026	12,788	1,379	423	292	147
Healthcare and Social Assistance	50,053	40,912	3,885	1,454	428	169
Other Services	10,110	7,592	982	193	1,112	111
Professional Management and Financial Services	43,032	35,547	2,911	680	2,391	1,080
Resource Extraction and Manufacturing	25,545	10,031	3,033	5,831	5,210	122
State and Local Government	58,497	25,971	10,182	2,934	9,977	272
Trade, Transportation, and Utilities	63,615	51,031	6,882	2,142	3,314	249
Total Industries	**316,400**	**226,306**	**34,577**	**14,756**	**23,903**	**2,235**

Source: Developed by Northern Economics based on BLS (2025)

[11] 2020 was excluded from our average calculations because some sectors reported 0 employment across Alaska while individual regions reported employment greater than 0, indicating a data issue with that year.

Table 28. Change in SW Jobs by Sector from 2010 to 2023

Sector	Change in Jobs (%)	Change in SW Share of AK (%)
Accommodations, Food Services, Arts & Entertainment	23.1	0.2
Construction	-6.9	-0.2
Federal Government	-21.0	-0.3
Healthcare and Social Assistance	4.3	-0.5
Other Services	-38.0	-1.1
Professional Management and Financial Services	-28.8	-0.5
Resource Extraction and Manufacturing	26.3	6.6
State and Local Government	14.6	0.9
Trade, Transportation, and Utilities	7.0	0.1

Source: Developed by Northern Economics based on BLS (2025)

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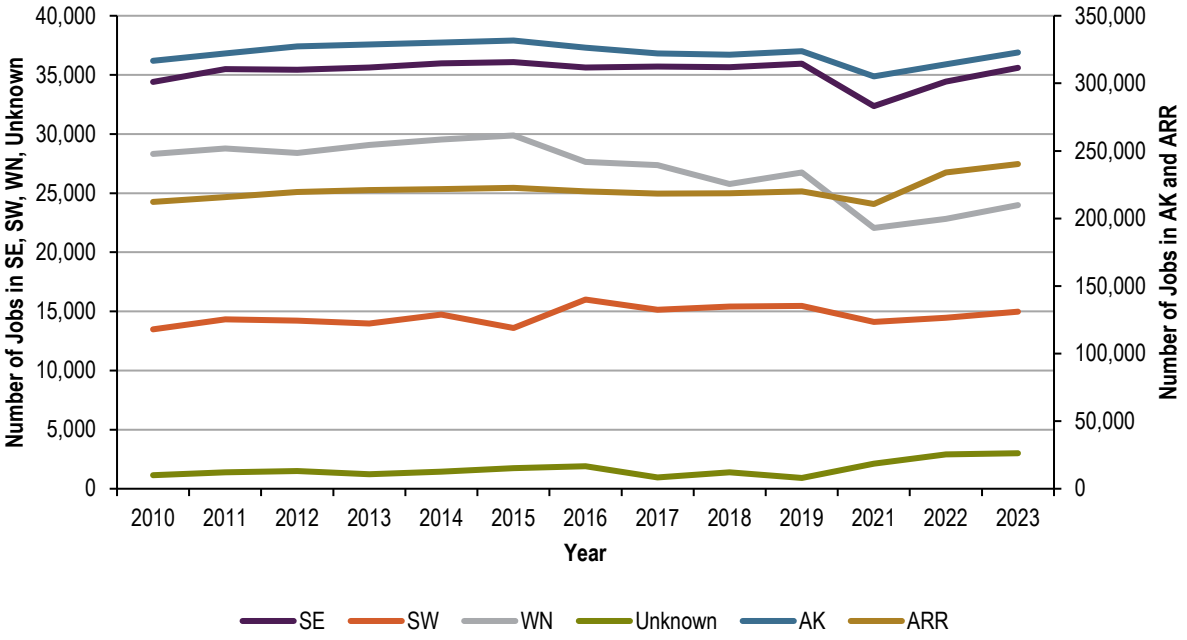
Figure 42. Total Employment by Region of Work, 2010–2023, Excluding 2020



Source: Developed by Northern Economics based on BLS (2025).

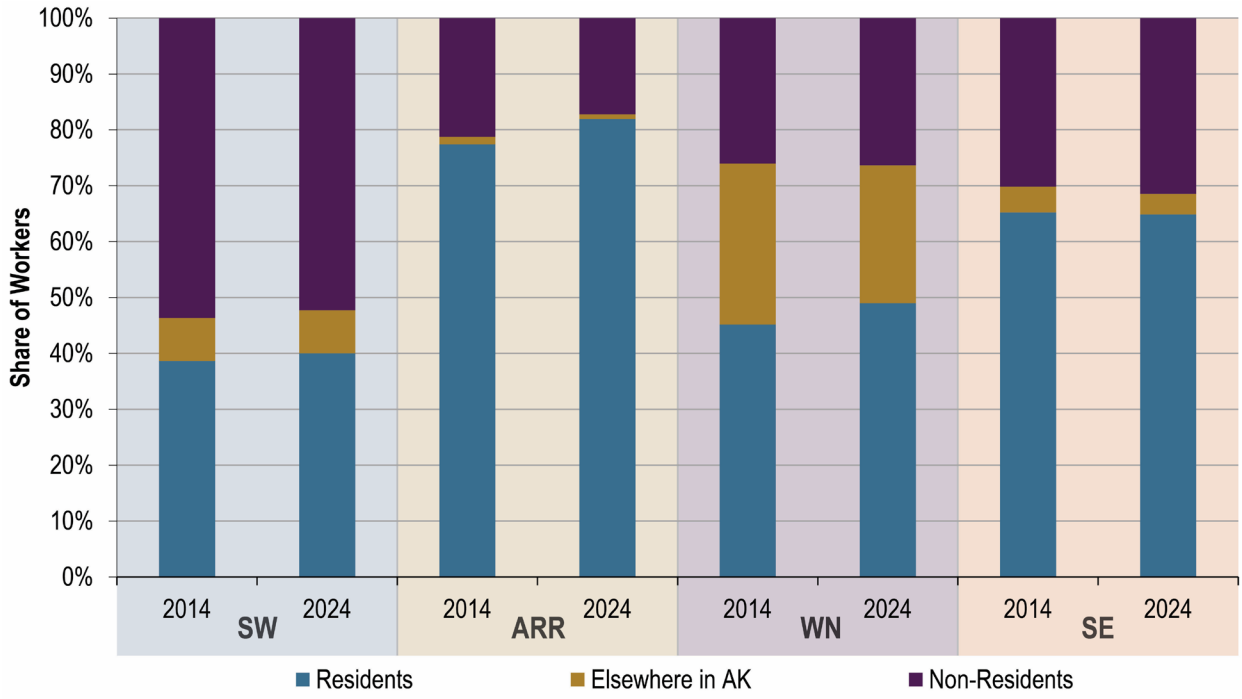
4.4.3 Commuting Patterns

The dataset used to analyze commuting patterns was based on PFD data matching with the ADOLWD wage file, which only includes information for employees covered by unemployment insurance within Alaska. Place of residency was based on whether someone applied for a PFD, and what address they provided on their application (if applicable). Workers included in the wage file were considered Alaska residents if they applied for either a 2024 or 2025 PFD. Notably, federal workers, military, and self-employed workers are not covered by unemployment insurance and as a result were not

included in this analysis. The most significant of these exclusions for capturing commuting patterns in the SWAMC region is self-employed workers since many commercial fishermen are self-employed. In contrast to the traditional definition of a commuter as someone who travels daily from their area of residence to a distinct area of employment, this analysis considers someone a commuter if they report residence in one borough or census area and are employed in another. The vast majority of commuters counted in this analysis travel from their areas of residence to distinct areas of employment for extended periods of time.

Figure 43 shows the share of workers in each region that reside within that region, elsewhere in Alaska, and outside of Alaska in 2014 and 2024. SW has the highest share of imported workers, both in 2014 and 2024. The only other region with a similar commuter profile to SW is WN, where a little over half of workers are imported. Comparing 2014 to 2024 reveals that commuter trends have generally been stable with relatively small changes.

Figure 43. Share of Workforce by Region of Residence and Region of Work, 2014 & 2024



Source: Northern Economics analysis of commuting patterns based on data from ADOLWD (Robinson 2015 & 2024)

Table 29 shows the share of residents who commute to work outside their region of residence in 2014 and 2024. In 2014 and 2024, a slightly higher share of SW residents commuted outside their region of residence compared with other regions. However, since 2014 there has been a decline across all regions in the share of residents who commute beyond their region for work. In 2024, SW was more like other regions (within 1 percent of the most similar region for share of commuters).

Table 29. Share of Residents Who Commute Outside their Region of Residence, 2014 & 2024

Region of Residence	2014	2024	Change
SW	10.4%	6.6%	-3.8%
ARR	7.6%	5.9%	-1.7%
WN	7.2%	4.9%	-2.3%
SE	5.8%	3.2%	-2.7%

Source: Northern Economics analysis of commuting patterns based on data from ADOLWD (Robinson 2015 & 2024)

Taken together, this analysis of commuting patterns between SW and the other regions of the state reveals that more non-SW Alaska residents commute to SW for jobs than SW residents who commute to jobs outside their home region. In 2024, about 60 percent of workers in SW were not SW residents, and just over 10 percent of SW residents worked outside their region of residence. This net importation of workers suggests that SW offers ample employment opportunities to residents of the other regions of Alaska, as well as non-residents.

5 Trade Flows and Economic Output

5.1 Trade Flows

Interregional trade flows measure the value of commodities and services produced in one region and exported to another region. Figure 44 below summarizes the interregional trade flows between the SW region and the four other regions included in this analysis. This figure shows only interregional trade flows for SW and not trade flows between and within other regions. The data reflect the trade flow estimates for the year 2022 from the IMPLAN model; this is the latest available data from the model. The values shown in Figure 44 were adjusted to reflect 2024 dollars.

Note that there is very limited data that accurately tracks interregional trade of goods and services on an origin-of-production basis. The data that are available only provides information on domestic trade of some shippable commodities; but these data are on an origin-of-movement basis and do not include the domestic trade of services. IMPLAN uses a gravity model to estimate these trade flows.[12]

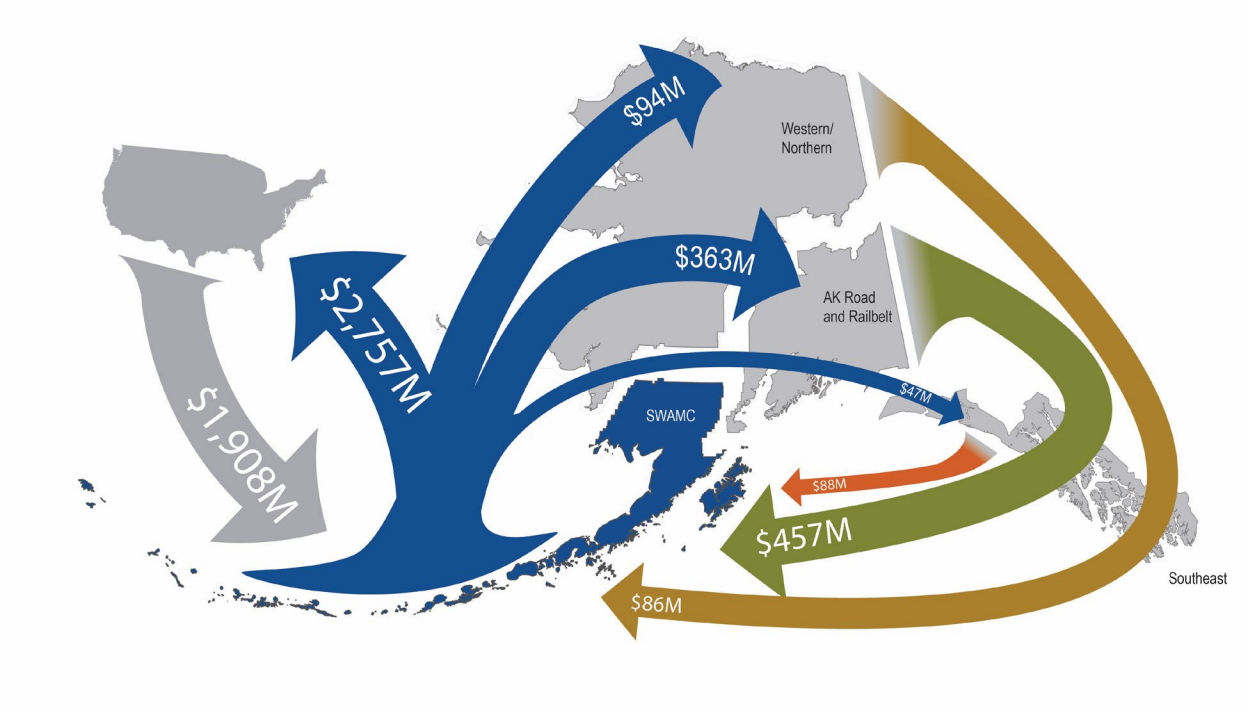
Figure 44 shows the vast importance of SW's trade with the rest of the U.S (outside Alaska). According to the trade flow estimates provided by IMPLAN, the total value of commodities and services exported from SW to the rest of the U.S. in 2022 amounted to about $2.8 billion—this was more than 5 times the combined value of exports to the other three regions of the state. Moreover, IMPLAN estimates that in 2022, 82% of SW's exports to the rest of the U.S. fell into the commodity category labeled "Food Products" (food manufacturing sector). One can safely assume that seafood products constitute the vast majority, if not all exports from SW to the rest of the U.S. Meanwhile, SW imported more than $1.9 billion of commodities and services from the rest of the U.S. in 2022, although the composition and value of the constituent imports is less certain than the seafood exports. Overall, including interregional trade with other Alaska regions, SW experienced a trade surplus in 2022, with total exports valued at $3.26 billion and total imports valued at $2.54 billion. As expected, trade flows between SW and the ARR region are significant, representing 11% of the total value of incoming goods and services from ARR and 18% of the value of goods and services exported to ARR. The top import from ARR by value was "Petroleum and coal products."

Finally, Table 30 shows the interregional trade flows in 2014 and 2022. Overall, from 2014 to 2022, SW's total value of imports increased by 3% ($75 million) while total value of exports declined by 5% ($162 million). The value of exports from SW to other Alaska regions declined by about

[12] A key aspect of the IMPLAN trade flow data is that the trade is on an origin-of-production basis, not an origin-of-movement basis. The data set tracks from where a commodity is produced to where it is consumed as either an intermediate or final use rather than from where a Commodity begins its export journey. The main inputs into IMPLAN's Gravity Model are as follows: 1) Distance: Index of the relative cost of shipping a good via its specific mix of transportation modes between all county-county pairs, from Oak Ridge National Laboratory; 2) Mass: Total demand (intermediate and final) for each Commodity (both goods and services) by each county. Total supply (industrial and institutional) of each Commodity (both goods and services) in each county; and 3) Calibrator: Average distance moved by shippable commodity from the Census Bureau's latest Commodity Flow Survey.

$41 million and the value of exports to the RUS declined by $121 million (2024$). The value of imports from the RUS, on the other hand, increased by $276 million while the value of imports from other Alaska regions decreased by $200 million (2024$). In 2014, SW exports accounted for 8% of total statewide exports to the rest of the U.S.; in 2022, SW's share of Alaska exports was 7%.

Figure 44. Interregional Trade Flows (2022 data, in millions of 2024$)



Source: Developed by Northern Economics, Inc. based on data from IMPLAN.

Table 30. Interregional Trade Flows in 2014 and 2022, in millions (2024 $)

	Incoming		Outgoing	
Region	2014	2022	2014	2022
SE	$68	$88	$70	$47
WN	$181	$86	$100	$94
ARR	$581	$457	$376	$363
Rest of U.S.	$1,633	$1,908	$2,878	$2,757
Total	**$2,463**	**$2,538**	**$3,424**	**$3,262**

Source: Developed by Northern Economics, Inc. based on data from IMPLAN.

5.2 Output

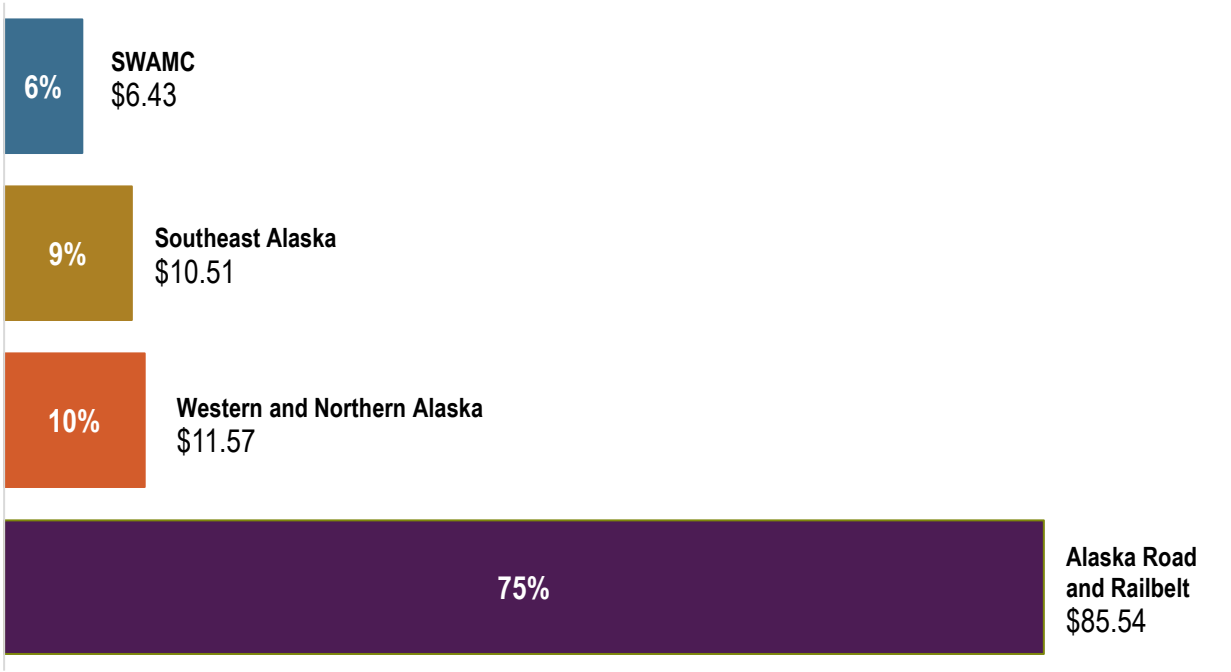
Economic output (or just output) is one measure of the overall size, or value, of an economy and refers to the total value of sales of products and services to final users in an economy (i.e., value added) plus sales of intermediate inputs. Gross domestic product, on the other hand (or, for a regional

economy, what is often referred to as Gross Regional Product [GRP]), represents only value added (i.e., the sum of employee compensation, taxes on production and imports, and gross operating surplus, less subsidies).

It is important to draw the distinction between output and GRP, because both are commonly used as measures of an economy's size and because, unlike GRP, output allows for the potential for double counting (BEA 2014). An example of the difference between the two measures is that of a crab that is harvested from SW waters, sold by the crab fishery to a processing company at a SW dock, and then processed and sold at wholesale value from the processing company's plant located in SW. A calculation of output associated with the crab would sum the crab's ex-vessel value and wholesale value, while GRP would subtract the ex-vessel value. If the crab were also retailed at a grocery store within SW, the ex-vessel and wholesale values would be added to the retail price in the calculation of output, while GRP would exclude both the ex-vessel and wholesale prices.

Figure 45 shows each region's share of statewide economic output in 2024, as well as total value of output for each region. SW's output of $6.4 billion represented 6% of statewide output in 2024, with ARR, WN, and SE contributing 75%, 10%, and 9%, respectively.

Figure 45. Economic Output by Region and Share of State Total, 2024 ($ billion)

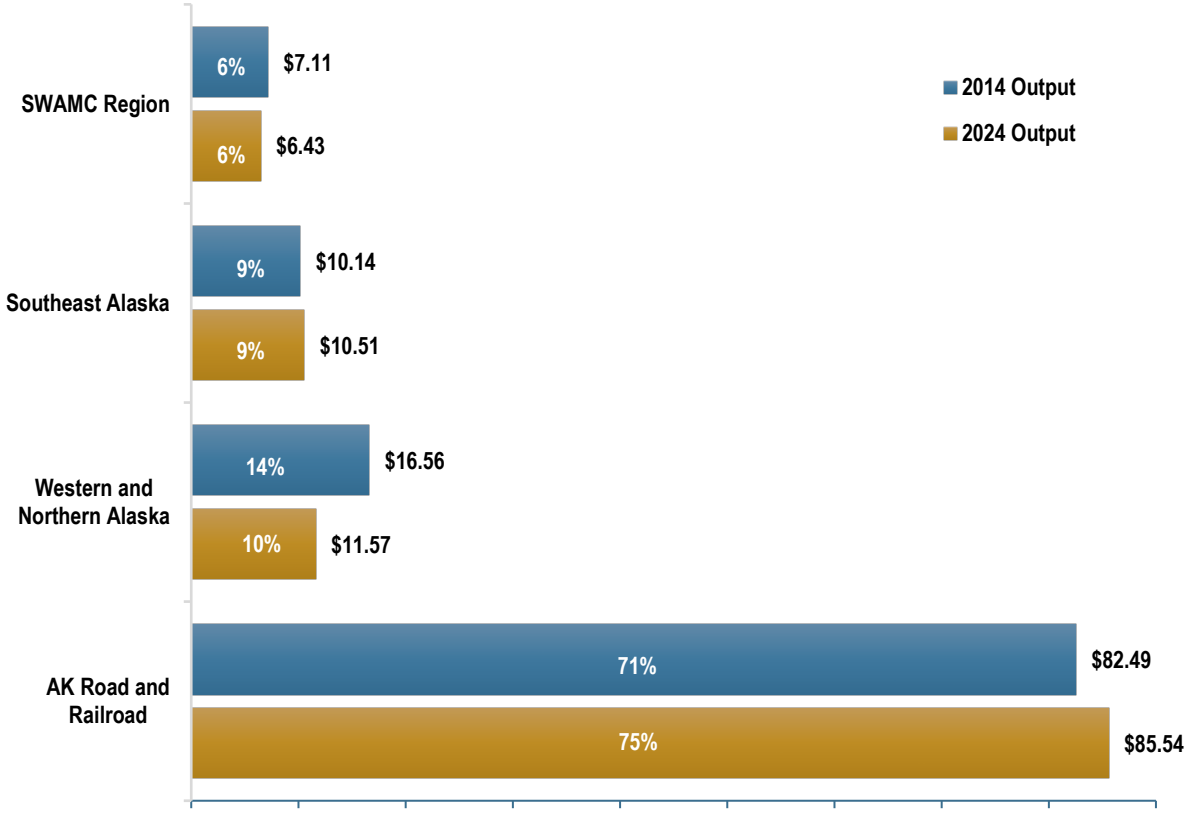


Source: Developed by Northern Economics, Inc. based on data from IMPLAN.

Figure 46 shows the change in economic output for each region from 2014 to 2024 in real 2024$. There was a 2% decline in statewide economic output from $116 billion in 2014 to $114 billion in 2024. At the regional level, the changes varied, with a significant decline of about 30% in economic

output in the Western and Northern Alaska region, 4% increase in both the Southeast Alaska and the Alaska Road and Railroad regions, and a 10% decline in the SWAMC region. The decline in the Western and Northern region's output was driven by the oil and gas sector, which experienced a drop in both price and production volumes in the last decade. This also contributed to the shift in this region's share of total statewide output from 14% to 10%.

Figure 46. Change in Economic Output and Share of Statewide Output by Region (in billions of 2024$)



Source: Developed by Northern Economics, Inc. based on data from IMPLAN.

Table 31 provides additional details regarding SW's contribution to total statewide output for Alaska's top ten sectors (ranked by output), as defined by IMPLAN. Each sector's rank in terms of its contribution to statewide output is provided in the far-left column, with actual output for each sector noted in the third column. The two columns furthest to the right identify SW's output by sector and the region's sector-specific percentage contribution to total state output. Notably, of total statewide output from the Seafood product preparation and packaging sector—whose output was ranked fourth overall for Alaska in 2024—SW's contribution of nearly $3 billion constituted 69%. It should also be noted that the data sources that inform IMPLAN's estimates of sectoral output do not capture output related to at-sea harvests and processing.

Comparing the 2024 data with the 2014 data (shown in Table 32), the SW seafood product and preparation sector increased its significant contribution to the statewide output to 69% compared to 63% in 2014, though SW's output for this sector decreased from $3.25 billion in 2014 to $2.97 billion in 2024.

Table 31. Top Sectors by Output, Alaska and SWAMC Region's Contribution to State Total in 2024

AK Rank	Sector	Alaska Output ($Millions)	SW Output ($Millions)	SW Share of State Total (%)
1	Oil and gas extraction	6,758		
2	Pipeline transportation	6,506		
3	Owner-occupied housing	4,806	161	3.3%
4	Seafood product preparation and packaging	4,326	2,972	68.7%
5	Employment and payroll of federal govt, military	4,272	158	3.7%
6	Hospitals	3,599	208	5.8%
7	Air transportation	3,051	109	3.6%
8	Other real estate	3,035	90	3.0%
9	Gold ore and silver ore mining	2,895		
10	Petroleum refineries	2,591		

Source: Developed by Northern Economics, Inc. based on data from IMPLAN.

Table 32. Top Sectors by Output, Alaska and SWAMC Region's Contribution to State Total in 2014

AK Rank	Sector	Alaska Output ($Millions of 2024$)	SW Output ($Millions of 2024$)	SW Share of State Total (%)
1	Oil and gas extraction	13,769		
2	Seafood product preparation and packaging	5,126	3,251	63%
3	Support activities for oil and gas operations	4,745		
4	Petroleum refineries	4,625		
5	Pipeline transportation	4,483		
6	Owner-occupied housing	4,446	169	4%
7	Air transportation	2,995	234	8%
8	* Employment and payroll of federal govt, military	2,707		
9	Hospitals	2,421	162	7%
10	Other real estate	2,382	75	3%

Source: Developed by Northern Economics, Inc. based on data from IMPLAN.

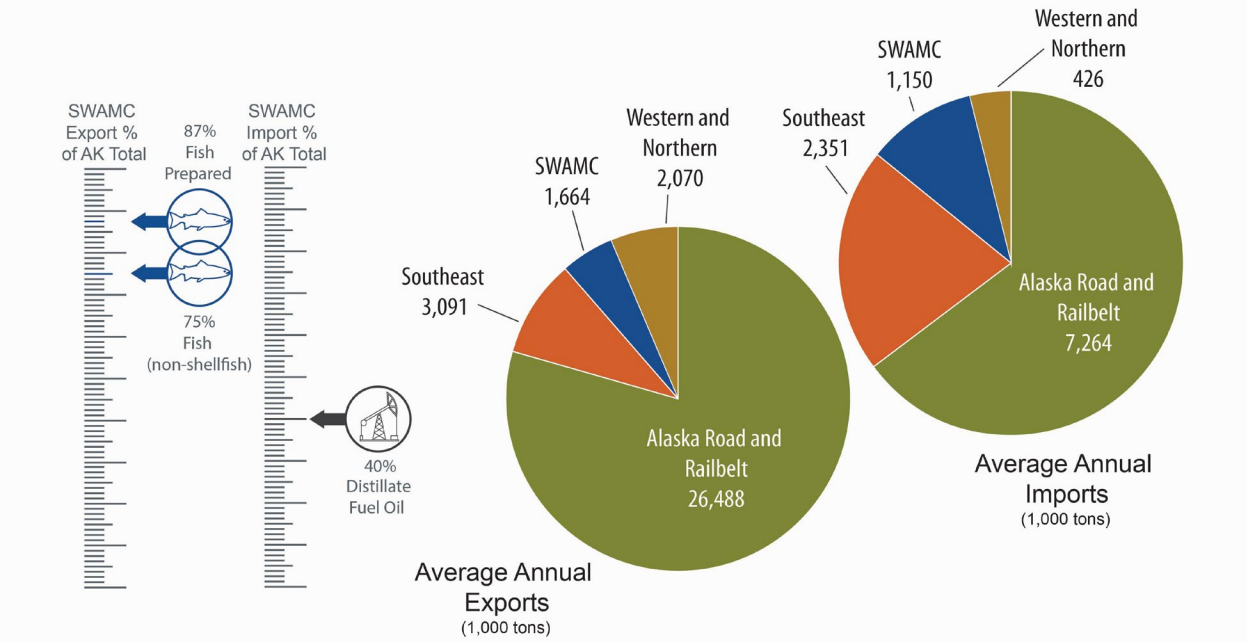
6 Waterborne Commerce

Waterborne trade, both domestic and international, is an important component of the SW economy, with large volumes of seafood products exported from and substantial volumes of petroleum products imported to the region. Through its Waterborne Commerce Statistics Center, the U.S. Army Corps of Engineers (USACE) publishes extensive data regarding both domestic and international waterborne transport of commodities. The international data provide commodity category, tonnage, and ports of both origin and destination for those commodities imported to or exported from the U.S. The domestic data offer commodity types specifically for international exports and imports, thereby identifying important international trade partners.

6.1 Domestic

Domestic waterborne exports from Alaska's four regions can be transported either to regions of the state or to the lower 48 states or Hawaii. Similarly, domestic imports need not be exported by other Alaskan regions, as they can originate from lower 48 ports or Hawaii. On average between 2019 and 2023, in terms of tonnage, Alaska was a net exporter in its waterborne trade with the rest of the U.S. (11,191 tons imported versus 33,313 tons exported on average, Figure 47). By tonnage alone, domestic waterborne exports from SW account for five percent of the state total, which is nearly double what SW accounted for on average from 2012–2013, the reporting period for the previous version of this report.

Figure 47. Average Annual Domestic Waterborne Exports and Imports by Region, 2019–2023



Source: Developed by Northern Economics based on data from USACE (2025b).

Table 33, which identifies domestic waterborne exports of highly aggregated commodity groups from Alaska and SW over the years 2019–2023, helps demonstrate that comparison of exports in terms of tonnage may distort an understanding of their relative values. A comparison of the relative values of a pound of Alaskan crude or Bristol Bay Sockeye helps clarify this point. By a large margin, the top waterborne commerce export by Alaska in terms of tonnage is crude and other petroleum products. A 42-gallon barrel of crude that weighs roughly 315 pounds and sells for $100 (far higher than today's prices), equates to an average value per pound of $0.32. Meanwhile, the wholesale value of a pound of frozen headed and gutted sockeye was $4.71 per pound in the first half of 2025 (ADOR 2026). That is, sockeye salmon is nearly fifteen times as valuable per pound compared with crude (even with an unrealistically high price assumption for crude). Thus, the weights shown in the pie charts in Figure 47 are not a good indicator of relative values of domestic waterborne exports from Alaska's four regions.

Despite the shortcomings of using weight as a proxy for value, there are some SW domestic waterborne export statistics worth noting. The region's exports of seafood products accounted for 75% of the state annual total on average from 2019 through 2023. The Seafood Products category includes fish, shellfish, fish (prepared), tallow and animal oils, and animal feed. It does not include manufactured products "not elsewhere classified" (NEC),[13] which for SW likely includes some additional seafood products. SW accounted for a minimal share of the other top Alaska domestic waterborne exports from 2019 to 2023. Figure 48 shows how SW's share of top Alaska exports has changed over time since 2010. SW has consistently accounted for a high share of Alaska's domestic Seafood Product exports, averaging 76.2% from 2010 to 2023. In 2016, 2017, 2018, and 2020 SW accounted for more than 80% of all domestic Seafood Product exports from Alaska. However, since 2022, SW's share of domestic Seafood Product exports has fallen slightly below the historical average.

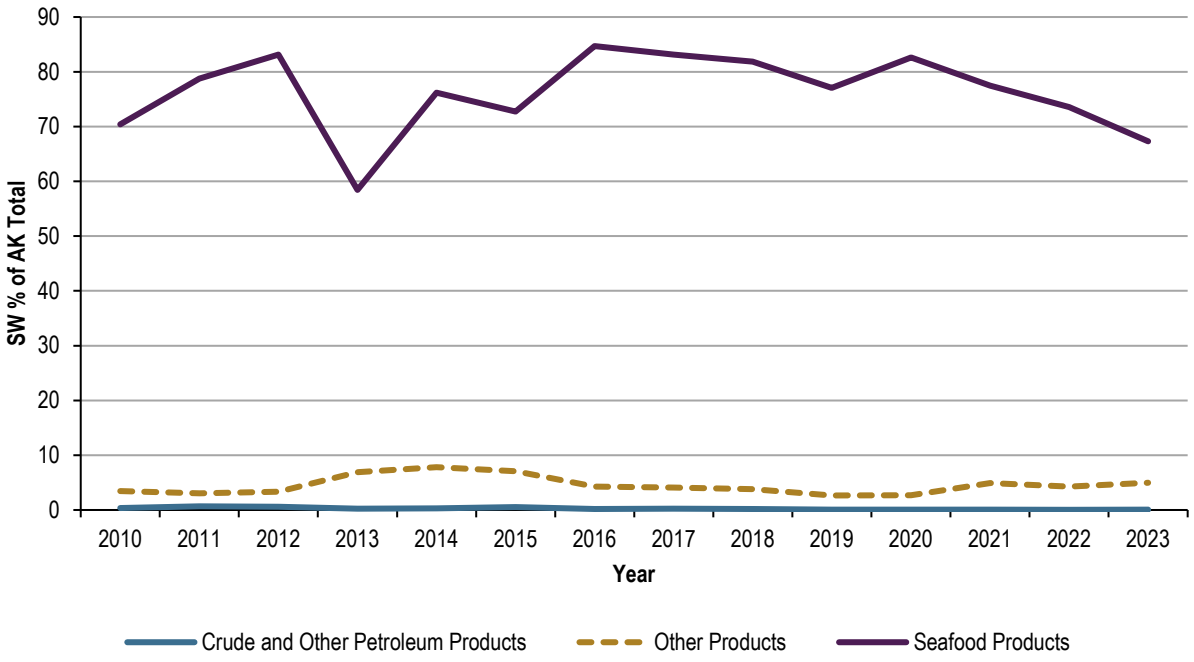
Table 33. Top Alaska and SW Domestic Waterborne Exports, 2019–2023

Commodity Group	Annual Exports (1,000 tons)		SW % of AK Total
	Alaska	SW	
Crude and Other Petroleum Products	26,005	13	<1
Seafood Products	1,927	1,436	75
Other Commodities	5,381	215	4

Source: Developed by Northern Economics based on data from USACE (2025b).

[13] "Unknown or NEC" commodities are commodities of unspecified classification.

Figure 48. SW's Annual Share of Top Alaska Domestic Waterborne Exports, 2010–2023



Source: Developed by Northern Economics based on data from USACE (2025b).

Importantly, commodities that show up as having been exported from a region are not necessarily produced in that region. This is due to the USACE's methodology for counting domestic waterborne exports and imports. Specifically, if a commodity produced in and exported from one region of a state is transported to a port in another region of the same state and then shipped again (either to another region of the state or another state), the USACE counts that commodity as an export for both the region in which the commodity was produced and the region to which the commodity was first transported. This methodology matters for two reasons: first, it allows for potential double-counting of domestically exported goods; and second, it follows that not all commodities that show up as exports from a particular region are necessarily produced in that region.

As documented above, by tonnage alone, Alaska is a net exporter in terms of domestic waterborne trade. However, as shown in Table 34, three of the state's top four domestic waterborne imports from 2019 to 2023 were petroleum-based products, with NEC manufactured products as the second largest import. Notably, SW's domestic imports of distillate fuel oil constitute 40% of statewide domestic imports of the commodity. Additionally, this was SW's top domestically imported commodity in terms of tonnage. The only other commodities where SW imported at least 10% of the AK total were NEC manufactured products (10%) and fabricated metal products (10%).

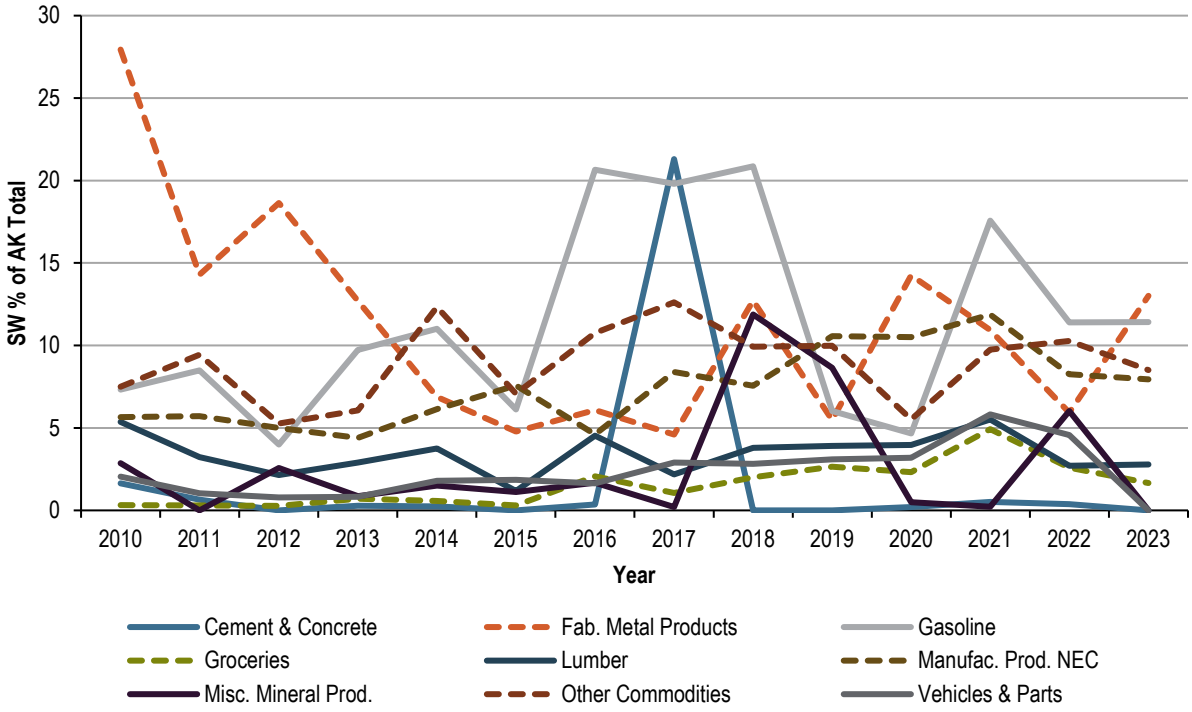
Table 34. SW's Average Share of Top Alaska Domestic Waterborne Imports, 2019–2023

Commodity Group	Average Annual Imports (1,000 tons)		SW % of AK Total
	Alaska	SW	
Crude Petroleum	2,100	0	0
Manufac. Prod. NEC	1,983	192	10
Gasoline	557	51	9
Distillate Fuel Oil	1,197	473	40
Groceries	318	9	3
Cement & Concrete	116	<1	<1
Lumber	115	4	4
Fabricated Metal Products	43	4	10
Vehicles & Parts	136	5	4
Misc. Mineral Prod.	42	1	3
Other Commodities	4,583	409	9

Source: Developed by Northern Economics based on data from USACE (2025b).

As can be seen in Figure 49, generally the SW share of top Alaska domestic waterborne imports in recent years has been similar with years past. Distillate fuel oil is historically a top import commodity for Alaska and SW. In 2018, SW imported just over 62% of all distillate fuel oil imported to Alaska, and from 2010 to 2014, SW imported an average of 43.6%, which was slightly less than the most recent 5-year period of 2019 to 2023 (44.6% on average).

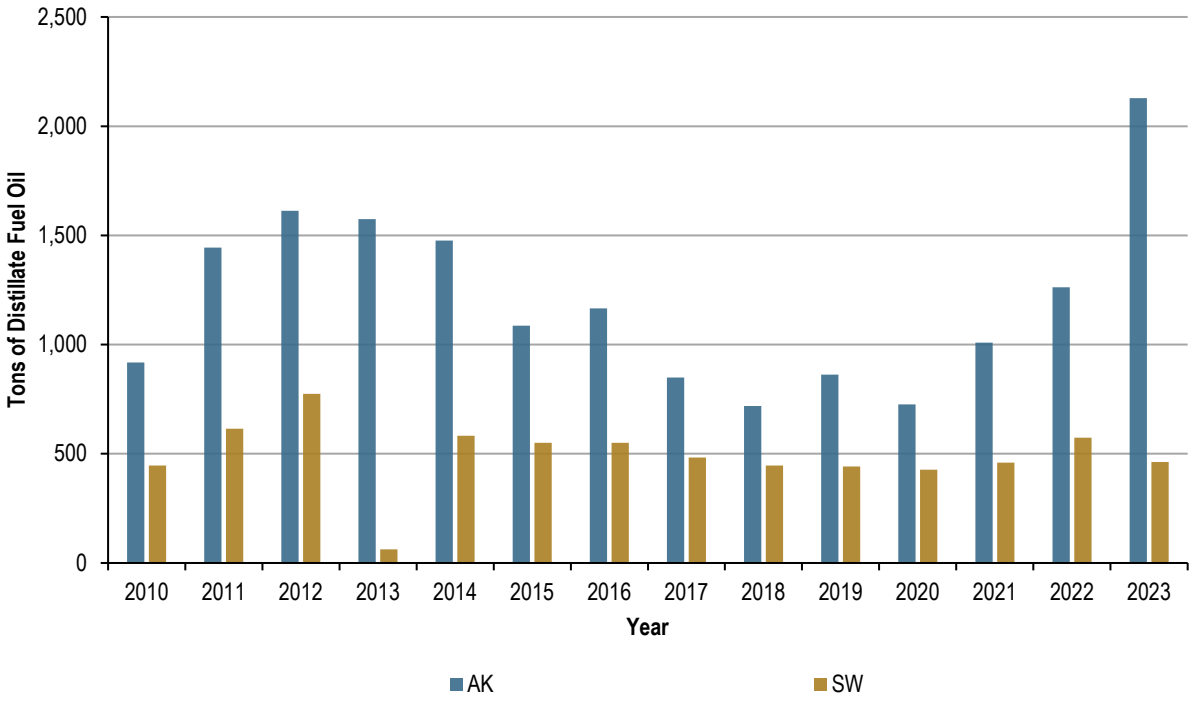
Figure 49. SW's Annual Share of Top Alaska Domestic Waterborne Imports, 2010–2023



Source: Developed by Northern Economics based on data from USACE (2025b).

Notably, the decline in SW's share of distillate fuel oil in 2023 was the result of a near doubling of AK's total imports year over year while SW's imports remained in line with historical norms (Figure 50). Since 2010, the only other commodities where SW's imports have accounted for more than 20% of AK imports of that commodity in a given year were cement & concrete (2017 only, 21.3%), gasoline (2016 and 2018, 20.7% and 29.9% respectively), and fabricated metal products (27.9% in 2010).

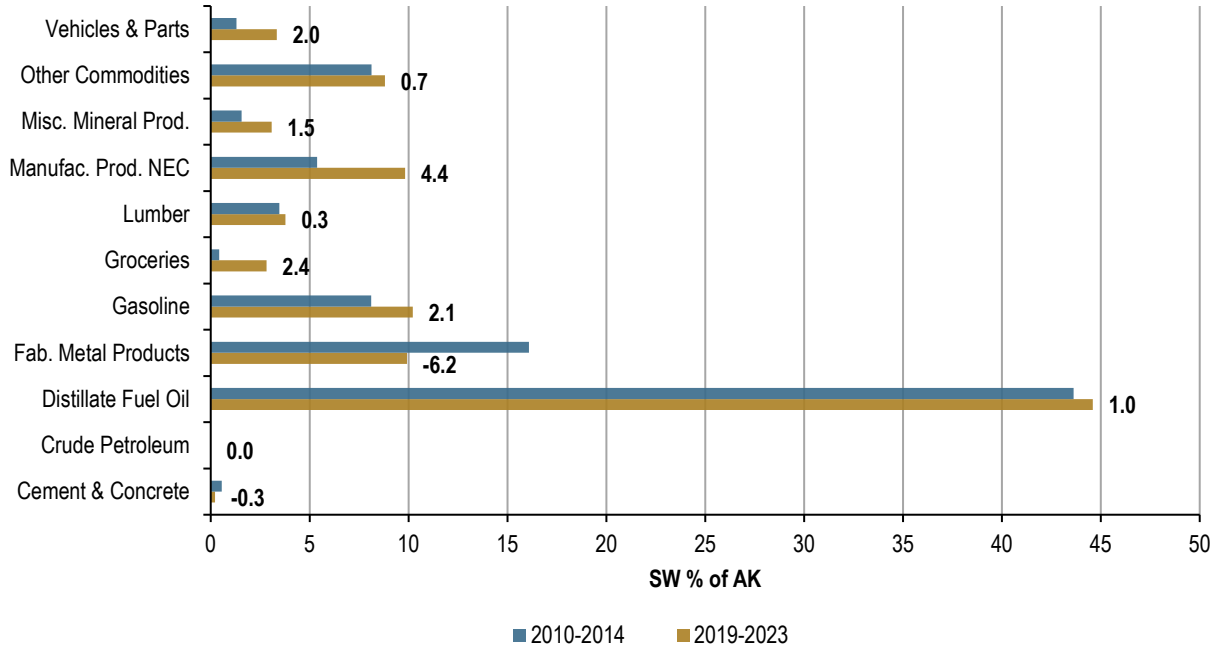
Figure 50. Change Distillate Fuel Oil Domestic Imports, 2010–2023



Source: Developed by Northern Economics based on data from USACE (2025b).

Figure 51 shows the change in SW's share of top Alaska domestic imports. The largest change from 2010 to 2014 versus 2019 to 2023 was a 6.2% decrease in SW's share of AK's fabricated metal product imports. SW increased its average share of imports for all commodities except for fabricated metal products, crude petroleum, and cement & concrete from the 2010—2014 period to the 2019–2023 period. SW historically and recently has imported no crude petroleum, so there has been no change in SW's share of this commodity which remains at 0. The largest gain was 4.4% for manufactured products NEC. Other commodities with an increase greater than 1% in SW's average share of AK imports included groceries (2.4%), gasoline (2.1%), and vehicles and parts (2.0%).

Figure 51. Change in SW's Share of Top AK Domestic Imports, 2010–2014 Average vs 2019–2023 Average



Source: Developed by Northern Economics based on data from USACE (2025b).

Note: The value at the end of the bars for each commodity is the change from the 2010–2014 average to the 2019–2023 average.

6.2 International

Unlike domestic waterborne export and import data, equivalent international data identify both the port of origin and destination. This provides for the clear identification of SW's international trade partners, both by tonnage and type of commodity. A comparison of Table 35 and Table 36 reveals that, in terms of tonnage, Alaska's international waterborne exports were 19% greater than its imports annually on average from 2019 to 2023. Among the state's top exported commodity categories were seafood products and forest products, while petroleum products represented a large portion of imports. Additionally, SW's share of statewide international waterborne exports greatly exceeded its share of domestic exports (22.0% versus 5.0%), however, SW trailed behind WN and ARR for total exports by tonnage.

Table 35 and Table 36 also reveal that SW's waterborne international exports of all commodities were more than double its imports. SW was the largest international seafood product exporter among the AK regions by a large margin, accounting for 97.0% of all international Alaska seafood product exports by tonnage. Additionally, SW accounted for nearly a third of forest product exports. SW only trailed ARR for total international imports by tonnage, accounting for 11.0% of all international imports. SW imported 37.0% of Alaska's fuel oils, lube oil & greases, as well as 85.0% of other agricultural product imports, and 13.0% of all other products.

Table 35. Average Annual International Waterborne Exports by Alaskan Region and Commodity, 2019–2023

	Commodity (1,000 tons)			
Region	Seafood Products	Forest Products	Other Products	Total Exports
ARR	8	28	1,072	1,108
SE	9	246	99	354
SW	563	113	111	787
WN	0	0	1,349	1,349
Total, All Regions	**581**	**387**	**2,631**	**3,598**
SW Exports as % of Total	97	29	4	22

Source: Developed by Northern Economics based on data from USACE (2025a).

Table 36. Average Annual International Waterborne Imports by Commodity and Alaskan Region, 2019–2023

	Commodity (1,000 tons)				
Region	Gasoline, Jet Fuel, Kerosene	Fuel Oils, Lube Oil & Greases	Other Agricultural Products	Other Products	Total Imports
ARR	1,856	184	0	287	2,328
SE	102	102	0	18	222
SW	51	223	3	47	325
WN	81	100	0	3	183
Total, All Regions	**2,090**	**610**	**3**	**355**	**3,058**
SW Imports as % of Total	2	37	85	13	11

Source: Developed by Northern Economics based on data from USACE (2025a).

Table 37 disaggregates average international waterborne exports originating from SW by commodity group and destination country from 2019 to 2023, while Table 38 provides the equivalent breakdown for international imports. China, South Korea, and Japan are the top destinations for exports from SW, with the overwhelming majority of these exports consisting of seafood products and forest products.

Table 37. Average Annual International Waterborne Exports by Commodity and Destination from SW, 2019–2023

	Commodity (1,000 tons)			
Country	Seafood Products	Forest Products	Other Products	Total Exports
China	204	112	7	322
South Korea	145	2	1	149
Japan	139	0	2	141
Other Countries	173	0	4	177
Total, All Countries	**661**	**115**	**13**	**789***

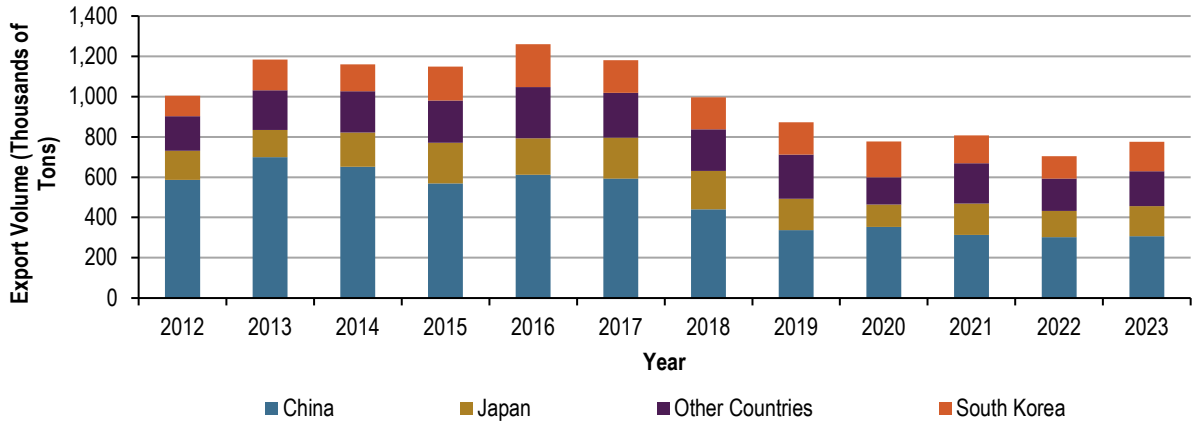
**Note: This table reports 789 instead of 787 due to rounding error.*

Source: Developed by Northern Economics based on data from USACE (2025a).

Figure 52 shows how total exports and their destinations have changed over time from 2012 to 2023. China has consistently been the top destination for international exports from SW by a considerable margin. Additionally, since 2012, the total international export volume from SW has fallen from its peak in 2016 of 1,260,000 tons to 776,000 tons in 2023, primarily driven by reduced exports to China. In 2012, exports to China peaked at 700,000 tons (59.1% of all international exports); however, in 2023 exports to China were only 307,000 tons (39.6% of all international exports). Volume of exports to other countries fluctuated year by year but have generally been stable.

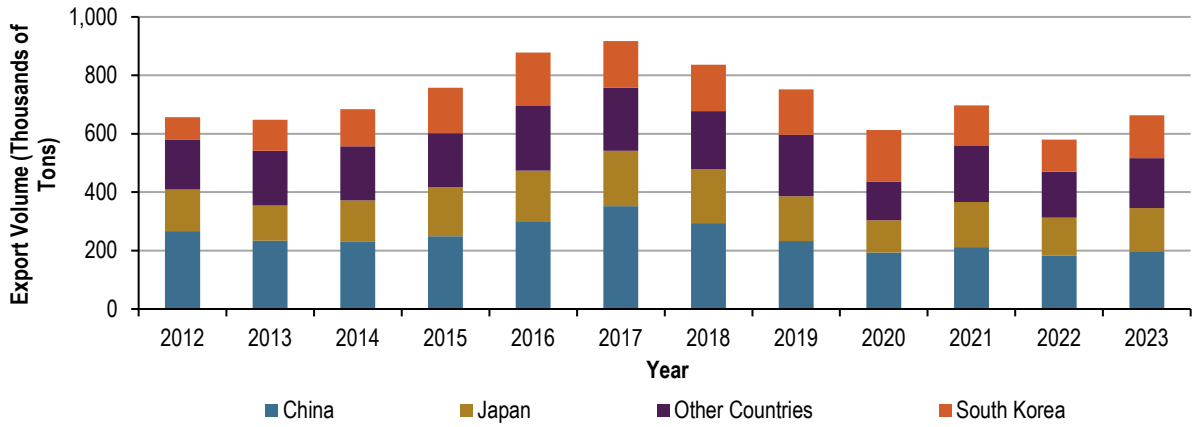
Figure 53 shows annual international seafood export volume by destination country from 2012 to 2023. Seafood export volume has fluctuated year to year, peaking in 2017 at 918,000 tons. Total seafood export volume in 2023 was similar to 2012. Interestingly, the share of seafood exports going to China has fallen by 10.7%, while the share of seafood exports going to South Korea has increased by 10.1%. By tonnage, the volume of seafood product exports to South Korea's nearly doubled increasing by 86.7%.

Figure 52. Annual International Exports by Destination from SW, 2012–2023



Source: Developed by Northern Economics based on data from USACE (2025a).

Figure 53. Annual International Seafood Exports by Destination from SW, 2012–2023



Source: Developed by Northern Economics based on data from USACE (2025a).

Similar to Table 37, Table 38 disaggregates average international waterborne imports to SW by commodity group and country of origin from 2019 to 2023. In recent years, the largest source of imports to SW by total tonnage originated from Japan (44.8%), driven substantially by fuel oils, lube oil and grease imports. Other noteworthy trade partners for imports to SW included Canada, China, and South Korea.

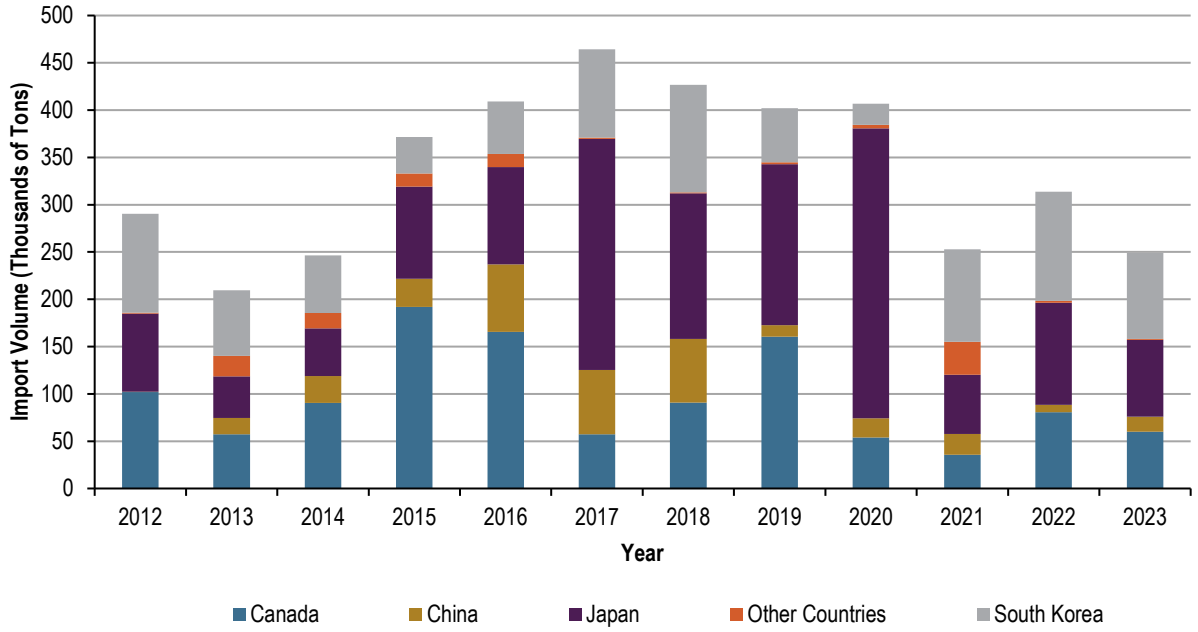
Table 38. Average Annual International Waterborne Imports to SW by Commodity and Country of Origin, 2019–2023

	Commodity (1,000 tons)				
Country	Gasoline, Jet Fuel, Kerosene	Fuel Oils, Lube Oil & Greases	Other Agricultural Products	Other Products	Total Imports
Canada	16	62	0	0	78
China	0	0	0	16	16
Japan	24	111	0	10	146
South Korea	11	45	2	19	77
Other Countries	0	7	0	2	9
Total, All Countries	**51**	**223**	**3**	**47**	**325**

Source: Developed by Northern Economics based on data from USACE (2025a).

Figure 54 shows the volume of waterborne imports to SW from 2012 to 2023 by country of origin. The total volume of waterborne imports has declined since 2020 compared with what was typical from 2015 to 2020. Japan, South Korea, and Canada have historically been and remain the primary sources of international imports.

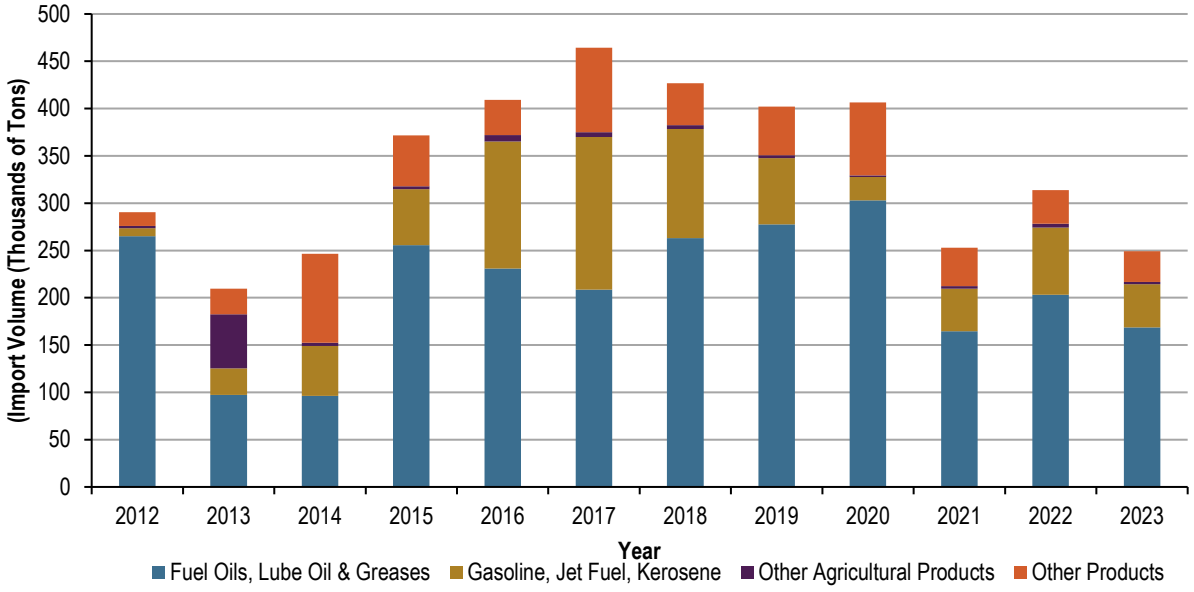
Figure 54. Annual International Waterborne Imports to SW by Country of Origin, 2012–2023



Source: Developed by Northern Economics based on data from USACE (2025a).

Figure 55 shows the volume of waterborne imports to SW from 2012 to 2023 by commodity. The distribution of today's top commodities aligns with what is typical historically, where fuel oils, lube oil, and grease are the main import. Gasoline, jet fuel, and kerosene are the next largest imports.

Figure 55. Annual International Waterborne Imports to SW by Commodity, 2012–2023



Source: Developed by Northern Economics based on data from USACE (2025a).

Table 39 and Table 40 offer insight into where waterborne international exports and imports depart and enter the SW region. Dutch Harbor, with its proximity to Asia and productive fishing grounds as well as its deepwater port, is the key port for international exports and imports in SW, which aligns with historical norms (Northern Economics, 2011). Table 39 demonstrates Dutch Harbor's significance to the region as a key seafood export port of origin. Historically, Kodiak was a key port for international forest products exports. Notably, over the past decade, international exports of forest products have declined, and as a result, Kodiak no longer plays a meaningful part in international trade by volume.

It is important to note that seafood supply chains are complex and variable across regions of Alaska. In some areas, like in Dutch Harbor, it is common for seafood products to be processed and shipped directly overseas; in other ports, it may be more common for seafood products to be processed locally, but then sent to Seattle or other areas before being shipped to their final destination (Northern Economics, 2011; McKinley Research Group 2023). It is estimated that Alaska's seafood industry ships half a billion pounds of seafood products to Seattle or Tacoma each year (McKinley Research Group 2023).

Table 39. Average Annual SW Waterborne Exports by Commodity and Port of Origin, 2019–2023

Port	Commodity (1,000 tons)			
	Seafood Products	Forest Products	Other Products	Total Exports
Dutch Harbor	605	0	13	618
Kodiak	6	0	<1	6
Other SW Ports	50	113	1	163
Total, All SW Ports	**661**	**113**	**13**	**787**

Source: Developed by Northern Economics based on data from USACE (2025a).

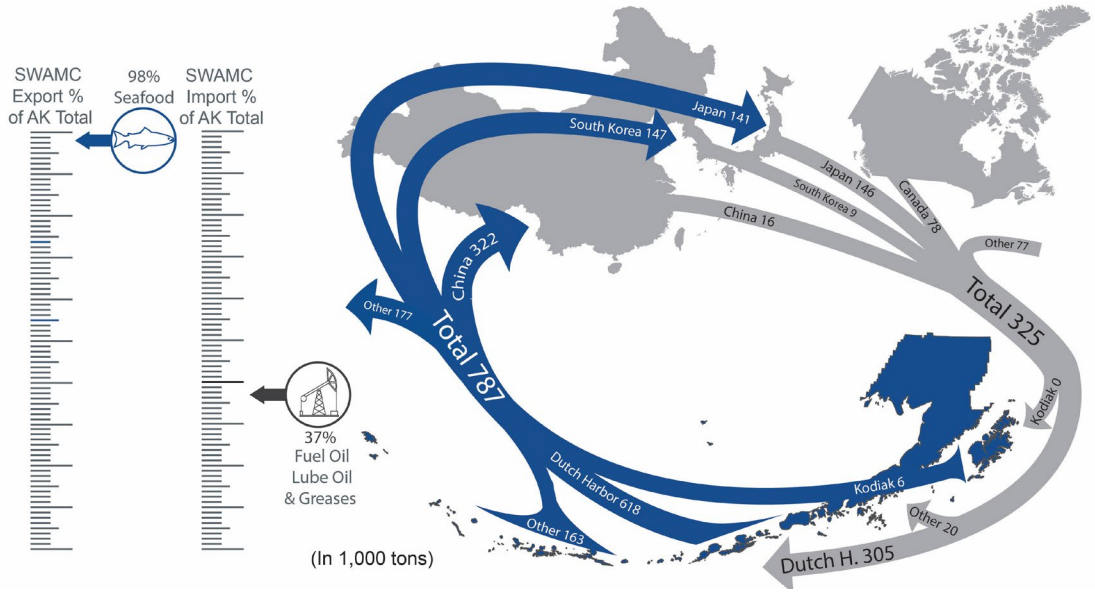
Table 40. Average Annual International Waterborne Imports to SW by Commodity and Destination Port, 2019–2023

Port	Commodity (1,000 tons)				
	Gasoline, Jet Fuel, Kerosene	Fuel Oils, Lube Oil & Greases	Other Agricultural Products	Other Products	Total Imports
Dutch Harbor	41	215	3	47	305
Kodiak	0	0	0	0	0
Other SW Ports	11	9	0	0	20
Total, All SW Ports	**51**	**223**	**3**	**47**	**325**

Source: Developed by Northern Economics based on data from USACE (2025a).

Figure 56 summarizes the international waterborne export and import story, as it depicts the discrepancy (in tonnage) between exports and imports to SW. The figure also shows the tonnages of commodities originating from SW ports and arriving at international destinations, as well as the equivalent import tonnages. The export and import scales on the left side of the graphic reemphasize SW's prominence with respect to Alaska's total exports of unprocessed fish and imports of fuel oils.

Figure 56. Average Annual International Waterborne Imports and Exports (1,000 tons), SW, 2019–2023

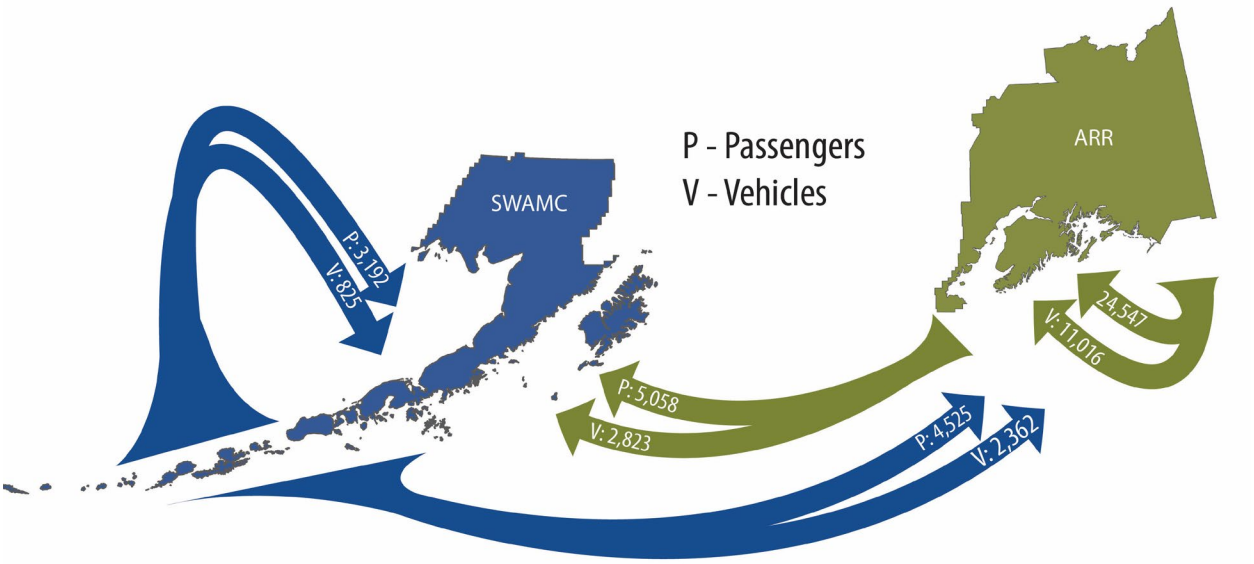


Source: Developed by Northern Economics based on data from USACE (2025a).

7 Alaska Marine Highway

The primary purpose of the Alaska Marine Highway System (AMHS) is to connect roadless and remote communities in Alaska with the rest of the U.S. highway system, helping to meet the social, educational, and economic needs of Alaskans. As a result, AMHS is a critical means of transportation between SW and ARR, as well as between points within SW, essentially serving as the region's equivalent of ARR's road system. With the middle sets of arrows, Figure 57 depicts the average annual volumes of people and vehicles[14] transported between the two regions via the AMHS over the years 2019 and 2021–2024.[15] During this time, the AMHS transported an average of 5,058 passengers and 2,823 vehicles from ARR to SW, with slightly lower volumes traveling from SW to ARR. Additionally, 3,192 passengers and 825 vehicles were transported from one place to another within the SW region annually via the AMHS.

Figure 57. Average Annual Intra- and Interregional Utilization of AMHS, 2019 & 2021– 2024



Source: Developed by Northern Economics based on data from Alaska Department of Transportation and Public Facilities (ADOTPF) (2019, 2021–2024).

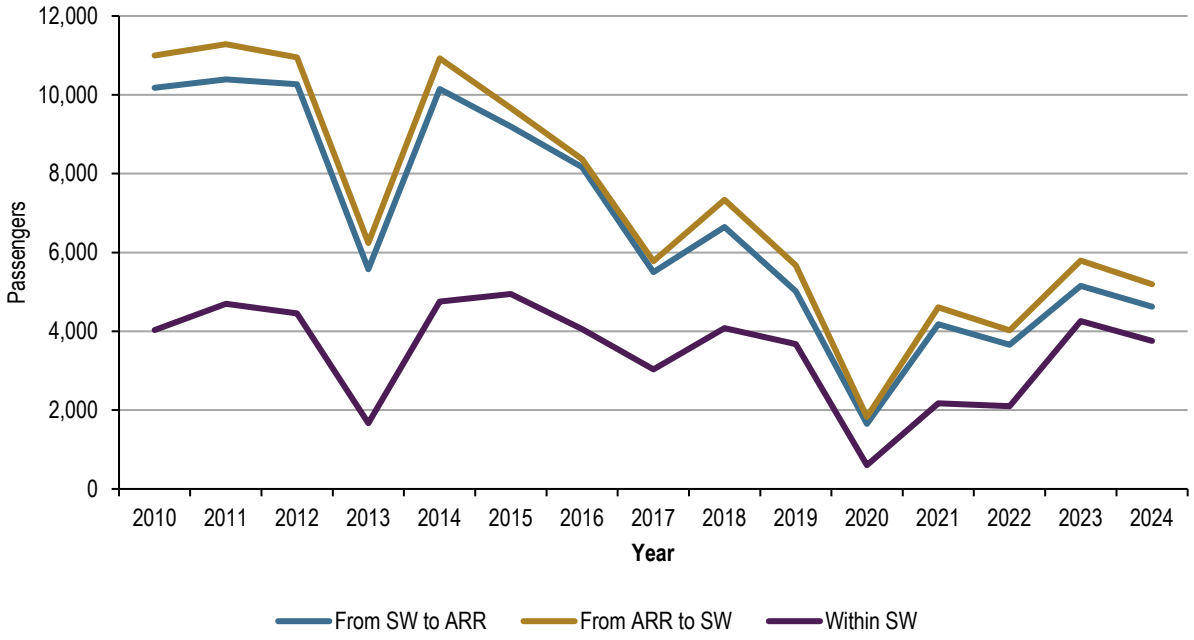
Figure 58 and Figure 59 detail the number of intra- and interregional passenger and vehicle transport for each year from 2010 to 2024. There are two years included in these figures that had dramatic shifts in passenger and vehicle volumes relative to the years immediately before and after. The first of these is 2013, with a sharp decline caused by the MV Tustumena being largely out of commission, which greatly curtailed AMHS service to SW. Once it was back in service in 2014, passenger and

[14] Cargo is transported via AMHS in container vans, however these vans are not counted separately from "vehicles" in the data. As a result, vehicles in this section means both passenger vehicles as well as cargo in some instances.

[15] We excluded 2020 since it was a clear outlier in the dataset that coincided with the COVID-19 pandemic, which had major impacts on travel.

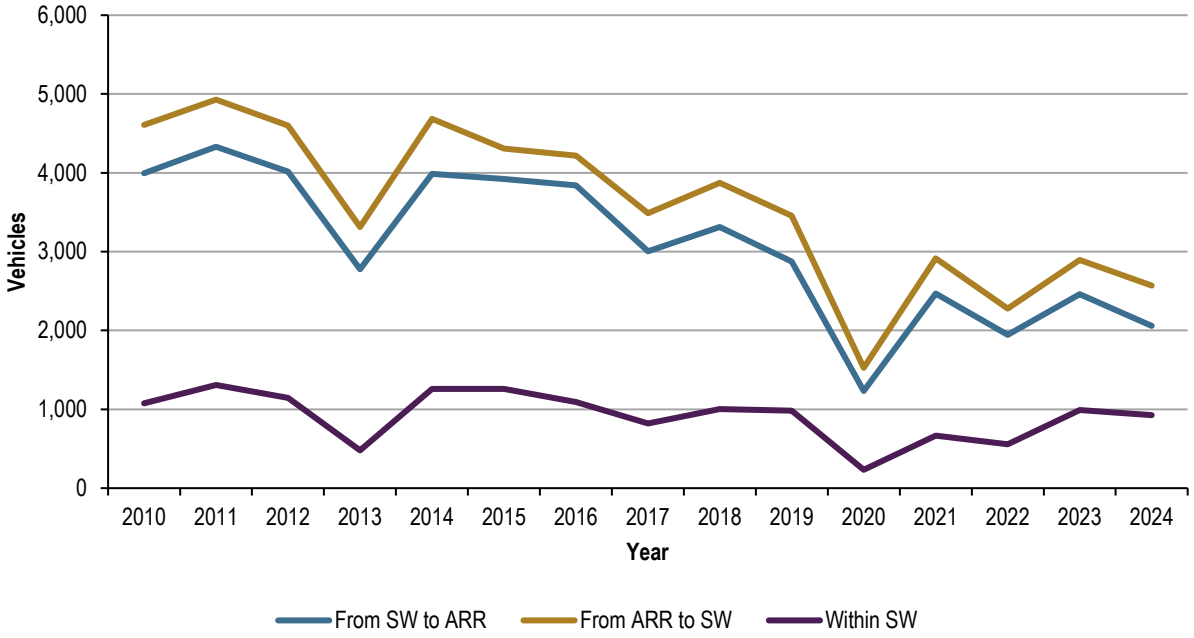
vehicle volumes returned to more typical levels. The second year with a dramatic shift was 2020, which coincided with the COVID-19 pandemic. However, following these temporary shifts, subsequent years returned to transportation volumes in line with prior trends..

Figure 58. AMHS Passenger Flows between SW and ARR, 2010–2024



Source: Developed by Northern Economics based on data from ADOTPF (2010–2024).

Figure 59. AMHS Vehicle Flows between SW and ARR, 2010–2024



Source: Developed by Northern Economics based on data from ADOTPF (2010–2024).

While vessel schedules can vary year-to-year, utilization of the AMHS for transport both within SW and from SW to ARR has gradually declined since the early 2010s. Passenger and vehicle volumes peaked in 2011, when there were 21,675 passengers and 9,260 vehicles transported between SW and ARR regardless of direction. Interregional passenger and vehicle volumes in 2024 were about half of what they were in 2010. However, the volume of passengers transported on AMHS has declined steadily across the whole system beyond SW. Across the AMHS system, passenger volumes have declined by 42.4% and vehicle volumes have declined by 41.8% since 2010. Causes of this reduction in AMHS utilization stem from reduced operations as a result of budget constraints from 2015–2018, a union strike in 2019, and then pandemic impacts in 2020 and 2021 (ADOTPF 2010–2024). In 2024 Homer and Kodiak were the primary ports that connected the Southcentral and Southwest regions. These primary ports align with historical norms for the AMHS during the 2010s.

8 Air Transport

In the absence of a road system connecting SW to the rest of the state, aviation represents an important interregional mode of transport for people, freight, and mail. Northern Economics obtained data regarding passenger, freight, and mail volumes originating from and arriving at SW airports from the "Air Carriers: T100 Domestic Markets – All Carriers" dataset, which shows only passengers, mail, and cargo that emplaned or deplaned at a given airport. The Bureau of Transportation Statistics (BTS) data have proved a valuable resource in past economic activity analyses because they are the most powerful tool for showing movements between airports. However, only larger certificated carriers report into the system, while general aviation flights and small air taxi operators generally do not.

SW relies on air transport particularly heavily for the movement of passengers and mail. Over the five years ending in 2023, combined inbound transport of passengers, freight, and mail to SW and outbound transport of passengers, freight, and mail from SW accounted for 6.3%, 1.0%, and 12.4% of combined inbound volumes arriving in Alaska and outbound volumes departing Alaska respectively (see Table 41). These figures include all inbound passengers, freight, and mail originating from points within Alaska or airports outside the state, as well as outbound transports destined for either intrastate locations or points outside Alaska.

Table 41. SW Passenger, Freight, and Mail Transports as Portion of Total Alaskan Volumes, 2020–2024

	Passengers (1000s)	Freight (million lb)	Mail (million lb)
Total Inbound and Outbound Volumes, 2020–2024	31,045.1	17,972.1	1,004.6
Avg Annual Inbound and Outbound Volumes, 2020–2024	6,209.0	3,594.4	200.9
SW Avg Annual Inbound Volumes	194.4	20.3	18.8
SW Avg Annual Outbound Volumes	194.1	16.0	5.5
SW Inbound % of Total	3.1	0.6	9.4
SW Outbound % of Total	3.1	0.4	2.7
Total In/Out % of Total	**6.2**	**1.0**	**12.1**

Source: Developed by Northern Economics based on BTS (2025).

Table 42 shows the average annual intraregional and interregional volumes of passengers and weight of freight and mail arriving at and originating from SW airports via domestic air transport over the years 2020–2024. During this period, 72.2% of passenger arrivals to SW originated in ARR compared to 26.4% originating from within SW, 0.9% from outside Alaska, and 0.5% from WN. The respective proportions of passengers traveling by air from SW to the other four regions were nearly identical. This all aligns with historical norms for air transportation in the region. Importantly, commercial travel between SW communities is very limited, and the majority of intraregional air travel requires a connection through Anchorage. In many cases, passengers flying from SW to

Anchorage may only be stopping over in Anchorage for a brief period of time and then boarding a flight for another SW destination.

Meanwhile, 82.6% of inbound air freight to SW originated from ARR, compared to 16.0% from within the region, minimal amounts from WN and outside Alaska, and none from SE. For outbound air freight from SW, ARR again was the primary destination (72.3%), followed by intraregional transports (26.4%). This trend of ARR being the primary region of origin and destination holds for inbound air transport of mail but is reversed for outbound mail from SW. While there is substantially more mail leaving SW than entering SW, 74.3% of inbound air mail is from ARR while 84.4% of outbound air mail is going elsewhere within the SW region. Generally, these current trends align well with historical norms with some minor fluctuations. One key difference comparing recent years to the early 2010s is a decrease in overall passenger volumes (about 219k inbound and outbound historically), which is a decrease of about 11.0%.

Table 42. Average Inbound and Outbound Volumes of Passengers, Freight, and Mail, SW, 2020–2024

	Inbound			Outbound		
Destination Region	Passengers	Freight (million lb)	Mail (million lb)	Passengers	Freight (million lb)	Mail (million lb)
ARR	140,348.8	16.8	14.0	140,218.8	12.5	0.8
SW	51,259.2	3.3	4.7	51,259.2	3.3	4.7
WN	995.8	0.1	0.2	987.4	0.1	0.1
SE	17.2	0.0	0.0	124.6	0.0	0.0
Outside AK	1,793.6	0.2	0.0	1,479.6	0.1	0.0
Total	**194,414.6**	**20.3**	**18.8**	**194,069.6**	**16.0**	**5.5**

Source: Developed by Northern Economics based on BTS (2025).

8.1 Passenger Travel

Passenger air travel data reveal the importance of Anchorage as the main point of connection between SW communities and the rest of the state and areas beyond, with 71.4% of outbound (from SW) passengers destined for Anchorage and 71.7% of inbound passengers originating in Anchorage. As noted above, many passengers flying from SW to Anchorage or from Anchorage to SW may be using Anchorage as a connecting point to another SW community, as intraregional service is limited. Nevertheless, Anchorage was the destination city for the top four outgoing (from SW) origin-destination city pairs from 2020 to 2024, as determined by passenger volumes, and the city of origin for the top four incoming origin-destination city pairs (see Table 43). In addition, Kodiak, King Salmon, Dillingham, and Unalaska comprised the top four passenger origin (outbound) and destination (inbound) cities, with Brooks Lodge, Cold Bay, Larsen Bay, and Old Harbor rounding out the top ten in each list. Notably, a handful of intraregional routes made the top ten for both outbound and inbound routes.

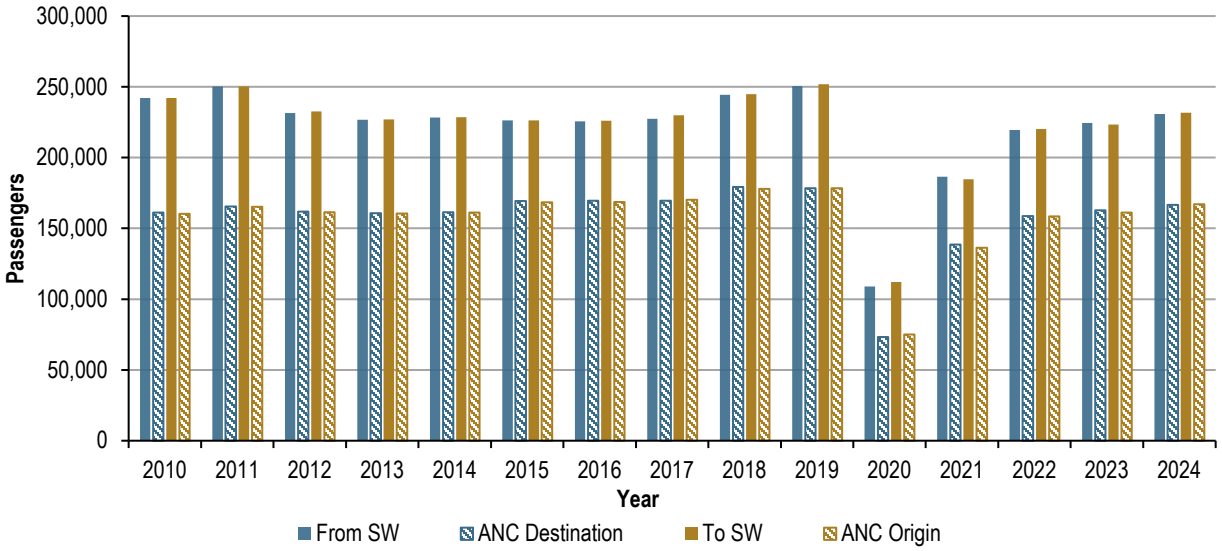
Table 43. Total Passenger Trips to and from SW by Top Origin-Destination Pairs, 2020–2024

From SW			To SW		
Origin	Destination	Passengers	Origin	Destination	Passengers
Kodiak	Anchorage	327,971	Anchorage	Kodiak	326,096
King Salmon	Anchorage	123,737	Anchorage	King Salmon	125,099
Dillingham	Anchorage	103,359	Anchorage	Dillingham	102,916
Unalaska	Anchorage	83,502	Anchorage	Unalaska	80,132
King Salmon	Brooks Lodge	21,892	King Salmon	Brooks Lodge	21,892
Brooks Lodge	King Salmon	21,789	Brooks Lodge	King Salmon	21,789
Cold Bay	Anchorage	14,341	Anchorage	Cold Bay	15,744
Kodiak	Larsen Bay	11,083	Kodiak	Larsen Bay	11,083
Larsen Bay	Kodiak	10,769	Larsen Bay	Kodiak	10,769
Old Harbor	Kodiak	10,737	Old Harbor	Kodiak	10,737

Source: Developed by Northern Economics based on BTS (2025).

Passenger air travel trends in recent years are generally well-aligned with what has been typical since 2010. Figure 60 shows annual total passenger travel to and from SW from 2010 to 2024, including the number of passengers going between Anchorage and SW. There was a sharp dip in passenger travel that coincided with the COVID-19 pandemic in 2020, but since 2020, passenger air travel volume has gradually recovered, growing slightly each year. As of 2024, it is nearing 2017 levels but still has not rebounded to 2019 levels. Notably, even when total passenger volumes have declined, the share of passengers traveling to or from Anchorage remained high and was higher in 2024 than it was in 2019. Additionally, in 2010, about 66% of inbound and outbound passengers traveled to or from Anchorage, which has increased to just over 72% as of 2024. The increase in passenger travel through Anchorage is likely the result of some regional airlines going out of business and reduced service between SW communities.

Figure 60. Annual Total Passenger Travel to and from SW, 2010–2024



Source: Developed by Northern Economics based on BTS (2025).

8.2 Freight

The vast majority of freight destined for SW by air annually on average (82.5%) from 2020–2024 originated in Anchorage, with only a slightly lower proportion of air freight originating in SW (76.0%) destined for Anchorage (see Table 44). In total from 2020 to 2024, over 2.5 times as much outbound air freight originated in King Salmon as any other SW city, with Kodiak, Dillingham, Sandpoint, and Unalaska rounding out the top five. Meanwhile, Dillingham, Kodiak, King Salmon, Unalaska, and Iliamna comprised the top five SW destinations in terms of air freight tonnage over the five years ending in 2024.

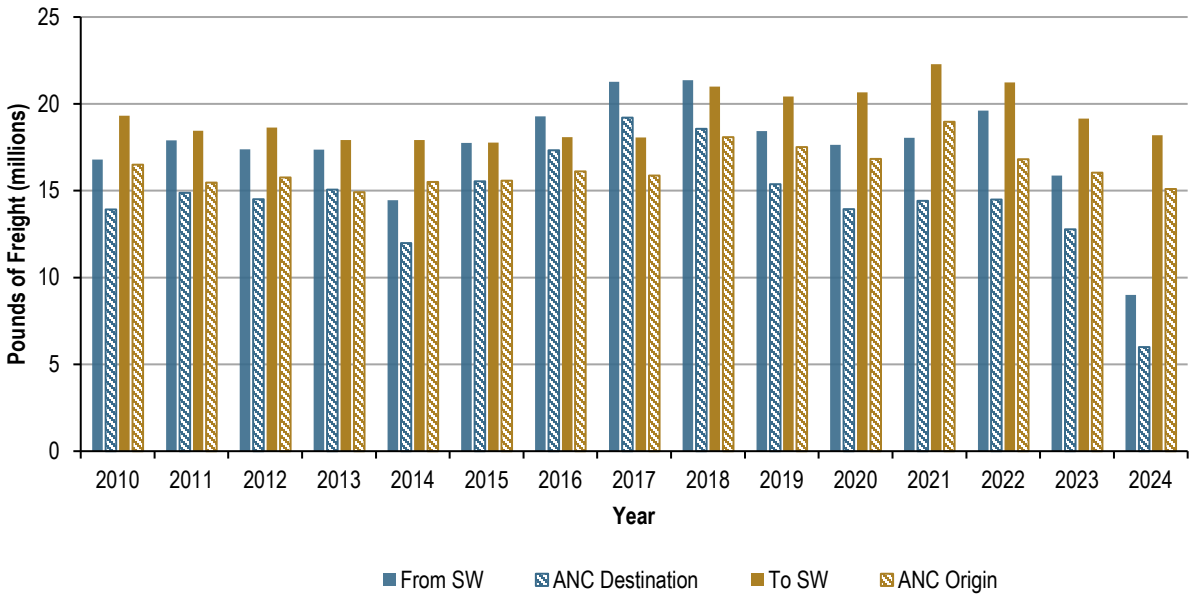
Table 44. Total Freight Transport to and from SW by Top Origin-Destination Pairs (Million lb), 2020–2024

From SW			To SW		
Origin	Destination	Freight	Origin	Destination	Freight
King Salmon	Anchorage	29.34	Anchorage	Dillingham	24.17
Dillingham	Anchorage	11.82	Anchorage	King Salmon	21
Kodiak	Anchorage	9.77	Anchorage	Kodiak	19.82
Sandpoint	Anchorage	3.33	Anchorage	Unalaska	6.76
Unalaska	Anchorage	2.41	Anchorage	Iliamna	3.17
Cold Bay	Anchorage	1.91	Anchorage	Sandpoint	1.77
Kodiak	Old Harbor	1.41	Anchorage	Cold Bay	1.55
King Salmon	Kodiak	1.22	Kodiak	Old Harbor	1.41
King Salmon	Kenai	1.09	King Salmon	Kodiak	1.22
Kodiak	Larsen Bay	1.07	Anchorage	St. Paul	1.13

Source: Developed by Northern Economics based on BTS (2025).

Air freight trends in recent years were generally well aligned with what has been typical since 2010 until 2022. Figure 61 shows annual total freight to and from SW from 2010 to 2024, including the volume of freight going between Anchorage and SW. Interestingly, since 2022, there has been a major shift in air freight volumes from SW to other places. Since 2022, annual freight volume has decreased by 54.1% to all destinations, and freight volume to Anchorage has decreased by 58.6%. However, over the same period freight volume going to SW only declined by 14.3%, which is more similar to other year-to-year fluctuations. Probable reasons for this shift include increasing expenses associated with shipping via air, changing mixes of seafood products leaving SW, and a declining population. Specifically, fresh salmon is the most likely to be shipped via air out of necessity, while other kinds of products could be shipped more economically via water. Additionally, comparing the five-year average of the first five years to the last five years included in Figure 61, we see that freight volumes from SW have declined by 4.4% while freight volumes to SW have increased by 10.1%.

Figure 61. Annual Freight Transported to and from SW (Million lb), 2010–2024



Source: Developed by Northern Economics based on BTS (2025).

8.3 Mail

Anchorage was the top city of origin for inbound mail to SW over the years 2020–2024, with 74.8% of inbound mail (by weight) originating in Anchorage annually on average. By a sizeable margin, Dillingham was the top inbound destination, with King Salmon, Kodiak, Togiak, and Unalaska rounding out the top five. Meanwhile Dillingham was the top city of origin for the top three (and six of the top ten) origin-destination pairs. Notably, unlike with passenger and freight transport, Anchorage was not the top destination for outbound air mail. Instead, the list of top outbound air mail origin-destination pairs (by weight) is highlighted by significant variety in the destination cities.

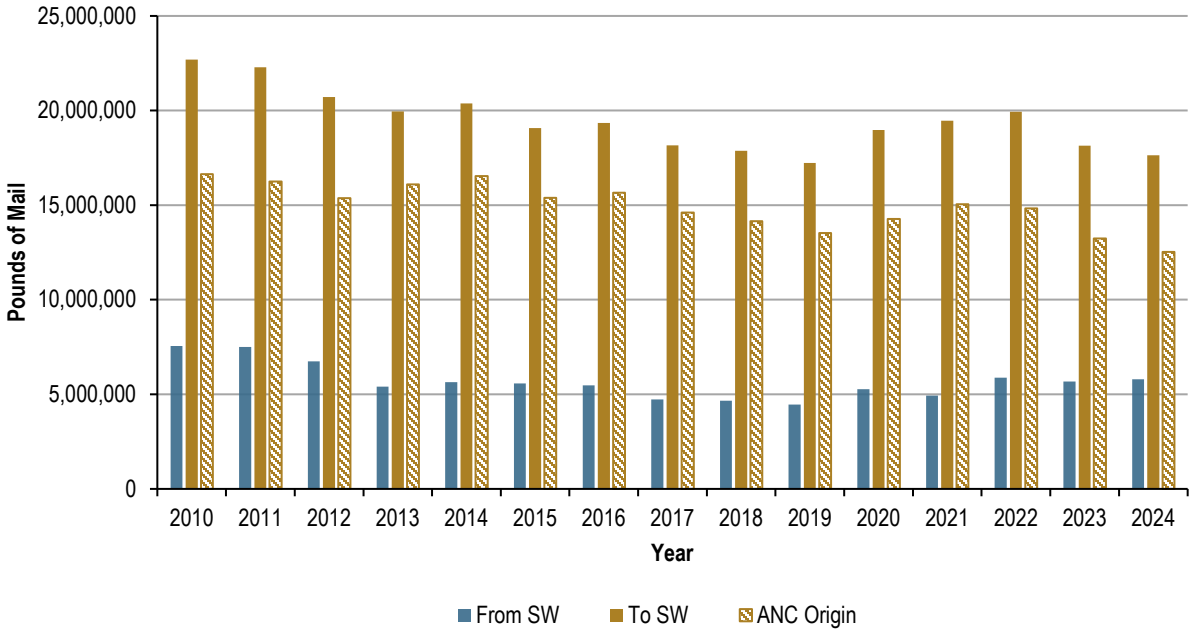
Table 45. Total Mail Transported via Air to and from SW by Top Origin-Destination Pairs (Million lb), 2020–2024

From SW			To SW		
Origin	Destination	Mail	Origin	Destination	Mail
Dillingham	Togiak	4.43	Anchorage	Dillingham	31.82
Dillingham	Manokotak	3.34	Anchorage	King Salmon	11.57
Dillingham	New Stuyahok	3.16	Anchorage	Kodiak	9.57
Kodiak	Anchorage	1.28	Dillingham	Togiak	4.43
Cold Bay	King Cove	1.04	Anchorage	Unalaska	4.34
Dillingham	Koliganek	1.02	Anchorage	Iliamna	3.75
Dillingham	Ekwok	0.74	Dillingham	Manokotak	3.34
King Salmon	Port Heiden	0.74	Dillingham	New Stuyahok	3.16
Unalaska	Anchorage	0.65	Anchorage	Togiak	2.79
Dillingham	Anchorage	0.62	Anchorage	St. Paul	2.43

Source: Developed by Northern Economics based on BTS (2025).

Figure 62 shows the annual mail transported to and from SW from 2010 to 2024. In the early 2010s the volume of mail going to and from SW was higher than in more recent years, however, since 2013, the volume has fluctuated some year to year but generally been stable. Notably, since the early 2010s the volume of mail out of Dillingham has increased. In 2010, 45.9% of air mail from SW originated in Dillingham compared to 57.1% in 2024. Over the same period, mail going into Dillingham remained stable at just over a third of all mail to SW.

Figure 62. Annual Mail Transported to and from SW, 2010–2024



Source: Developed by Northern Economics based on BTS (2025).

9 Tourism

Unfortunately, the Alaska Visitors Statistics Program (AVSP) has been discontinued with the last edition published in 2016. Historically, the AVSP was the best source of data to provide a complete profile of Alaska's visitor industry. Since then, the McKinley Research Group and Destination Analysts have published periodic reports on tourism in Alaska in partnership with the Alaska Travel Industry Association (ATIA), which are helping to fill in the gap left when AVSP ended. These reports do include some limited information specific to Kodiak and Dutch Harbor as well as the Southwest region per their definition. However, it is important to point out that their definition of Southwest Alaska includes the Bethel Census Area and is not exactly the same as what we have defined as SW in the rest of this report. This analysis did not attempt to reconcile the reported survey results with this study's definition of Southwest. As a result, Southwest as described in this section is what ATIA defines as SW, and is slightly different from the rest of the report.

In late 2023, ATIA published the Alaska 2022–2023 Visitor Profile Report and the Alaska 2022–2023 Tourism Impact Model in partnership with Destination Analysts, which offered insights for Kodiak and Dutch Harbor specifically, as well as the Southwest region. According to the Tourism Impact Model, there were 2,724,180 visitors to Alaska during this time, 135,550 of whom visited the Southwest region (ATIA, 2023a). The report defines summer as May through October, and winter as November through April. Interestingly, Southwest accounted for a larger proportion of winter visitors than summer visitors (5.0% and 3.0%, respectively). Historical summer visitor volumes by region were included in the Tourism Impact Model comparing 2011, 2016, and 2022. All regions, including Southwest, had growth in the volume of visitors. Southwest reported 58,000 visitors in 2011, 84,000 visitors in 2016, and 87,674 visitors in 2022. When factoring in how long people stayed in each location, 7.0% of nights stayed were in Southwest that summer, compared with 4.0% of nights in 2016. Additionally, about 6% of all direct tourism spending from 2022 to 2023 occurred in the Southwest region.

The Visitor Profile Report offers more insights into who visited SW and how they traveled (ATIA 2023b). The Visitor Profile Report is based on a total of 4,256 surveys collected for travel between May 2022 and April 2023. The survey estimated that 7.0% of all visitors surveyed went to SW. The traveler type most likely to report visiting SW was guided group visitors (18.0%), followed by independent travelers (9.0%) and cruise visitors (2.0%). Additionally, 2.0% of survey respondents visited Kodiak, and similar to the rest of the SW region, guided group visitors were the most likely traveler type to have visited Kodiak (13.0%). Activities that at least half of guided group visitors participated in during their trip included wildlife viewing (80.0%), local cuisine (74.0%), shopping (70.0%), museums/galleries (52.0%), bear viewing (52.0%), and sightseeing excursions by boat (50.0%). Additionally, guided group travelers were more likely to participate in adventure activities than any other traveler type, and they were the only traveler type where more than 10.0% of those surveyed participated in the following activities: dog sledding/kennel tour, guided backcountry tour,

ice carving contests/ice museums, ATV-4-wheeling, backpacking (overnight), hunting, sporting events, and mountain biking.

While a small proportion of cruise visitors go to Southwest, the cruise industry is of importance to the region. Pre-pandemic, Kodiak had 26,300 cruise visitors in 2019, which was about 2% of all Alaska cruise visitors (McDowell Group 2020). This was more visitors than Wrangell, Homer, Anchorage, or Valdez reported that year. While it has taken time to recover from the pandemic, cruise visitors are coming back. In 2023, Kodiak had 12,600 cruise visitors and 20,300 in 2024 (McKinley Research Group LLC 2025). In 2024, Dutch Harbor reported more than 13,600 cruise visitors, which was notable for the community since they historically have not had over 10,000 cruise visitors. Additionally, going into the 2025 cruise season, Kodiak had 30 port visits scheduled, and Dutch Harbor had 16 (Cruise Lines International Association 2026).

10 Conclusions

Despite widespread economic pressures since 2014, Southwest Alaska remains one of the state's most important economic regions because of the scale of its fisheries, seafood processing, and trade activity. At the same time, many indicators suggest that the region is becoming more economically concentrated while facing ongoing challenges in population retention and resident workforce participation, and as a result, residents are benefiting less.

Southwest regional fisheries illustrate this especially well. While the region has faced multiple stressors since the last report, it continues to rank among the highest-volume and highest-value fishing regions in the nation and remains a major source of statewide fisheries activity and tax revenue. Since 2021, ex-vessel revenue fell sharply from $1.3 billion to $600 million in 2024, a 54% decline, while wholesale value from SW shorebased processors dropped 46% from $2.6 billion to $1.4 billion. Shared fish taxes also fell to their lowest level in 2024 at $20.7 million, but still averaged $32.5 million annually between 2015 and 2024, with SW communities accounting for 75%, or $24.6 million. This combination of steep recent decline and persistent statewide importance is a key theme: the region remains highly productive and fiscally important, even as the value generated by its core industries has become more volatile and compressed.

That volatility appears to be interacting with longer-term demographic and labor force challenges. SW experienced the largest population decline in Alaska since 2015, with continued projected losses through 2035 and net outmigration increasing since the last report. Per capita income increased only modestly relative to the rest of the state, and although total jobs in SW rose slightly over the longer term, the number of jobs held by SW residents declined, a trend mirrored in the number and share of local fish processing jobs and decline in the resident share of fisheries revenue. Together, these patterns suggest that even where economic activity persists, the region may be capturing less of its benefits through stable population, resident employment, and household income growth. In other words, the region's economic base remains large, but its local demographic foundation has weakened.

Trade and industry data show a similar tension between scale and erosion. SW continues to play an outsized role in Alaska's seafood economy—seafood products dominate exports, the seafood product and preparation sector increased its share of statewide output, and SW's share of Alaska domestic seafood exports grew over time. But export values to the rest of the U.S. declined, while the value of imports from outside Alaska increased, particularly fuel. This suggests that SW remains a critical production and processing hub while becoming increasingly dependent on external inputs and vulnerable to cost pressures beyond the region's control.

Transportation patterns reinforce that interpretation. AMHS volumes have gradually declined over time, and outbound air freight from SW has dropped sharply since 2022, especially to Anchorage. These shifts likely reflect broader changes in how goods and people move through the region,

including industry contraction, high transportation costs, and possible shifts in product form or distribution channels. The fact that inbound freight has declined less sharply than outbound freight is consistent with the broader pattern seen elsewhere in the findings: SW remains dependent on imported goods and services even as outward economic flows have weakened.

Tourism is one of the few areas showing a clearer growth trend, with visitor volumes, nights, and spending all rising over time. Still, tourism remains modest relative to the scale of seafood and does not appear large enough to offset declines in fisheries-related value, trade, and transportation. Instead, it points to some diversification at the margins rather than a fundamental shift in the region's economic structure.

Overall, the findings suggest a regional economy that remains exceptionally important to Alaska, but is under growing strain. Southwest Alaska continues to anchor a large share of the state's fisheries production, seafood processing, exports, and shared fish tax base, yet that economic importance now coexists with declining revenues, reduced processing value, population loss, lower resident workforce participation, and weaker transportation flows. These results highlight the need for strategic planning to address these issues and support the region's growth.

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