



Front cover: Trawler (photo credit: NOAA Fisheries Northeast Fisheries Science Center)

Inside cover: Red drum, Virginia (photo credit: Jason Willey)

Fisheries Economics of the United States 2015

Economics and Social Analysis Division
Office of Science and Technology
National Marine Fisheries Service
1315 East-West Highway, 12th floor
Silver Spring, MD 20910

**NOAA TECHNICAL MEMORANDUM NMFS-F/SPO-170
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U.S. Department of Commerce

Wilbur Ross, Jr., Secretary of Commerce

National Oceanic and Atmospheric Administration

Benjamin Friedman, Acting NOAA Administrator

National Marine Fisheries Service

Samuel Rauch III, Acting Assistant Administrator for Fisheries

NOAA Fisheries Publications

Each year NOAA Fisheries produces three annual reports covering different aspects of the status of United States marine fisheries.

Status of Stocks is an annual report to Congress on the status of U.S. fisheries and is required by the Magnuson-Stevens Fishery Conservation and Management Act. This report, which is published each spring, summarizes the number of stocks on the overfished, overfishing and rebuilt lists for U.S. federally managed fish stocks and stock complexes. The report also shows trends over time, discusses the value and contributions of our partners, and highlights how management actions taken by NOAA Fisheries have improved the status of U.S. federally managed stocks. For example, the 2014 report shows that the number of stocks listed as subject to overfishing or overfished is at an all-time low. http://www.nmfs.noaa.gov/sfa/fisheries_eco/status_of_fisheries/

Fisheries of the United States, published each fall, has been produced in its various forms for more than 100 years. It is the NOAA Fisheries yearbook of fishery statistics for the United States. It provides a snapshot of data, primarily at the national level, on U.S. recreational catch and commercial fisheries landings and value. In addition, data are reported on U.S. aquaculture production, the U.S. fishery processing industry, imports and exports of fishery-related products, and domestic supply and per capita consumption of fishery products. The focus is not on economic analysis, although value of landings, processed products and foreign trade are included. <http://www.st.nmfs.noaa.gov/commercial-fisheries/fus/fus16/index>

Fisheries Economics of the United States, published each fall, provides a detailed look at the economic performance of commercial and recreational fisheries and other marine-related sectors on a state, regional and national basis. The economic impact of commercial and recreational fishing activities in the U.S. is also reported in terms of employment, sales and value-added impacts. The report provides management highlights for each region that include a summary of stock status, updates on catch share programs, and other selected management issues. Economic performance indicators for catch share programs are reported and will be extended to include non-catch share fisheries in the next edition. http://www.st.nmfs.noaa.gov/economics/publications/feus/fisheries_economics_2015/index

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Catching albacore in Astoria, OR
(photo credit: Craig D'Angelo)

Preface

Fisheries Economics of the United States, 2015

Fisheries Economics of the United States, 2015, is the ninth volume in this annual series, which is intended to provide the public with easily accessible economic information about the nation's commercial and recreational fishing activities and fishing-related industries. This year's report covers the years 2006 to 2015 and provides descriptive statistics for the following categories: economic impacts of the commercial fishing and seafood industry; commercial fisheries landings, revenue and price trends; saltwater angler expenditures and economic impacts of marine recreational fishing; recreational fishing catch, effort and participation rates; and employer and non-employer establishment, payroll, employees and annual receipt information for fishing-related industries.

The report also provides management highlights for each region that include a summary of stock status, updates on catch share programs, and other selected management issues. Economic performance indicators for catch share programs are reported.

Sources of Data

Information in this report came from many sources. Commercial landings, revenue, and price data, and recreational fishing effort and participation data, were primarily obtained from the Fisheries Statistics Division, Office of Science and Technology, and NOAA Fisheries. Other data sources included the Alaska Fisheries Science Center, NOAA Fisheries; Alaska Department of Fish and Game; California Department of Fish and Game; Oregon Department of Fish and Wildlife; Washington Department of Fish and Wildlife; the Pacific Coast Fisheries Information Network (PacFIN); Texas Parks and Wildlife Department; and Western Pacific Fisheries Information Network (WPacFIN). Economic impacts from the commercial fishing and seafood industry and recreational fishing sectors are from two separate national IMPLAN models of the Economics and Sociocultural Analysis Division, Office of Science and Technology, NOAA Fisheries. Fishing-related industry information was obtained from the U.S. Census Bureau, Bureau of Economic Analysis, and Bureau of Labor Statistics.

Acknowledgments

Many people participated in the production of this report. Cameron Speir, Cara Mayo, and Gabrielle Ryan are the editors of this report series; Rita Curtis, Sabrina Lovell, and Cara Mayo were primary authors and analysts on this edition of Fisheries Economics of the United States. Key collaborators include Megan Strachura, Lauren Dolinger Few, Karen Greene, Laura Johansen, Jean Lee, Michael Lewis, Michael Liddel, Alan Lowther, and Eric Thunberg. The report's design and layout was done by Avi Litwack, Jacqui Fenner, and Cara Mayo.

NOAA Fisheries staff in the regional Fisheries Science Centers and Regional Offices provided expertise: Alan Haynie, Justin Hospital, Christopher Liese, Michael Travis and Stephen Holiman. Other colleagues who provided information and expertise included Mark Fisher (Texas Parks and Wildlife Department), Ed Hibsich (Pacific States Marine Fisheries Commission), and Williams Romberg (Alaska Department of Fish and Game).

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Commercial Fisheries - WHAT DOES THE TERM MEAN?

Commercial fisheries, in this report, refers to fishing operations that sell their catch for profit. It does not include salt-water anglers that fish for sport or subsistence fishermen. It also excludes the for-hire sector, which earns its revenue from selling recreational fishing trips to saltwater anglers. The commercial fisheries section reports on economic impacts, landings revenue, landings, and ex-vessel prices of key species and species groups.

METRICS DEFINITIONS¹

Economic Impacts

The employment, personal income, and output generated by the commercial harvest sector and other major components of the U.S. seafood industry.

Landings

The poundage or number of fish unloaded by commercial fishermen or brought to shore.

Landings Revenue

The price that fishermen are paid for their catch.

Ex-vessel Prices

The price received by a captain, at the point of landing, for the catch.

FREQUENTLY ASKED QUESTIONS

What are fish caught with in commercial fishing?

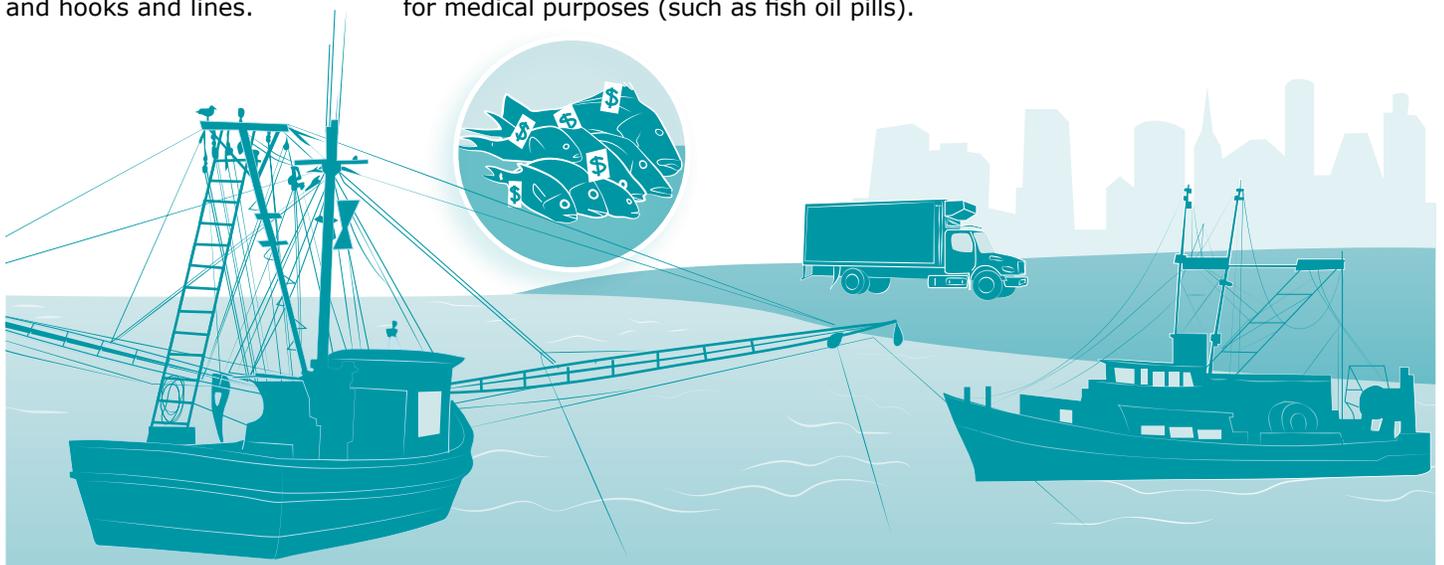
Fish can be caught using a variety of gear, including potts and traps, trawls and seines, gillnets, dredges, and hooks and lines.

What happens to seafood caught by commercial fishermen?

Fish caught by commercial fishermen are first processed and packaged. Then they are sold to various establishments for consumption, such as restaurants and supermarkets. They can also be used as animal food and for medical purposes (such as fish oil pills).

Does the United States get seafood from anywhere else?

Not all fish are caught by U.S. commercial fishermen. A large percent of the seafood the U.S. receives is imported.



¹ For full definitions, see the Glossary at the back of this publication.

Recreational Fisheries - WHAT DOES THE TERM MEAN?

Recreational fisheries, or recreational fishing, refer to fishing for pleasure rather than selling the fish for profit (i.e., commercial fishing) or for subsistence. The recreational fisheries section of Fisheries Economics of the U.S. reports on angler trips, participation, expenditures and economic impacts, and catch of key species and species groups. Only saltwater, or marine, recreational fishing is included in FEUS.

METRICS DEFINITIONS¹

Economic Impacts and Expenditures

The employment, sales, and personal income generated by expenditures on fishing trips and fishing-related durable goods (i.e. equipment used for recreational fishing).

Participation

The number of anglers who fish in a given state or region. Anglers can be from in-state or out-of-state and from a coastal county or non-coastal county.

Fishing Trips/ Effort

The number of fishing trips taken by recreational fishermen (anglers).

Harvest and Release

The total number of fish either: 1) caught and kept (**harvested**), or 2) caught and **released**, by recreational anglers from an area over a period of time. Total catch is the sum of the number of fish harvested and released.

FREQUENTLY ASKED QUESTIONS

How do anglers affect the fishing economy?

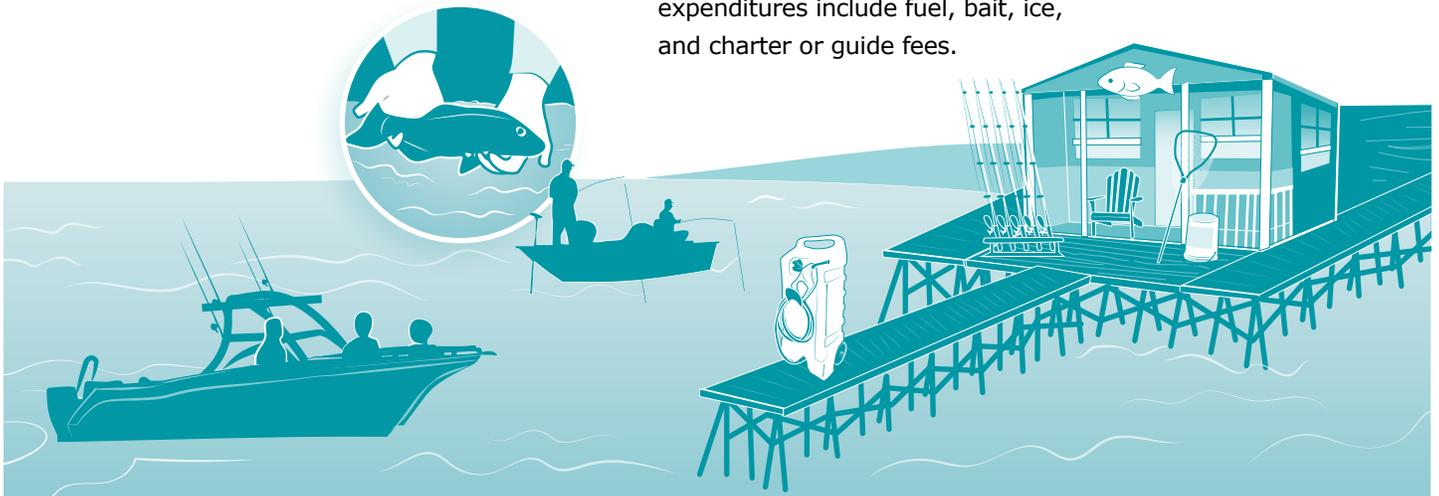
When anglers participate in fishing activities, they support sales and employment in recreational fishing and other types of businesses. Anglers buy fishing equipment from bait and tackle shops, rent or buy boats, or pay to have others take them on charter boats to fish. They may also pay for food and drink at local restaurants, purchase gas for their boat, and stay in hotels for overnight fishing trips.

What do anglers spend their money on?

Durable goods, such as fishing tackle and boat, vehicle, and second home expenses. **Trips**, which can be taken in one of three modes: as for-hire (charter or party boat), private (or rental boat), and shore (fishing from shore). Some examples of trip expenditures include fuel, bait, ice, and charter or guide fees.

What do anglers do with their catch?

Some anglers catch fish to eat (i.e., harvest), while others practice catch and release. In recreational fishing, anglers do not sell the fish they catch for profit.



Marine Economy - WHAT DOES THE TERM MEAN?

The "Marine Economy," in this report, refers to the economic activity generated by sectors of the economy that depend directly on oceans (or Great Lakes). We report on two industry sectors within the marine economy: 1) seafood sales and processing; and 2) transport, support, and marine operations. Information such as the number of establishments, number of employees, and annual payroll for these fishing and marine-related industries is used to determine their relative levels of economic activity in a state.

METRICS DEFINITIONS¹

Seafood Sales and Processing

These sectors are a direct representation of the Establishments, Employees, Sales and Payroll for seafood processors, wholesalers, and retailers that buy fish from commercial fishermen and distribute to consumers.

Transport, Support, and Marine Operations

The various sectors that contribute to the overall marine economy that may or may not support the fishing economy.

FREQUENTLY ASKED QUESTIONS

Does the marine economy include commercial and recreational fisheries?

Yes, commercial and recreational fisheries contribute to the overall marine economy.

What marine economy sectors, featured in the report, are related to commercial and recreational fisheries?

The seafood product preparation & packaging and wholesale and retail seafood sales sectors are major parts of the commercial fishing industry. The Marinas, Navigational Services, Port & Harbor operations, and Ship & Boat Building sectors provide goods and services used in both commercial and recreational fisheries.

Why does the report include sectors that are independent of the fishing economy?

Information on sectors that are independent of the fishing economy, like freight transportation, provides context for how national and regional economies are affected by the use of ocean resources.

