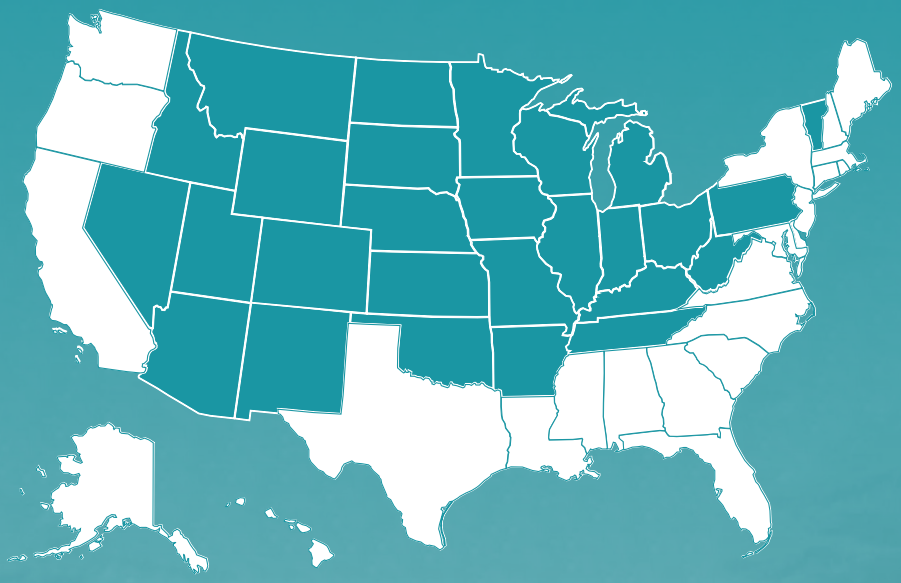
National Overview

- Alabama
- Alaska
- California
- Connecticut
- Delaware
- Florida
- Georgia
- Hawai’i
- Louisiana
- Maine
- Maryland
- Massachusetts
- Mississippi
- New Hampshire
- New Jersey
- New York
- North Carolina
- Oregon
- Rhode Island
- South Carolina
- Texas
- Virginia
- Washington



Schooling horse-eye jack, Southeast U.S.
(photo credit: NOAA Fisheries)

MANAGEMENT CONTEXT

The authority to manage federal fisheries in the United States was granted to the Secretary of Commerce by the Magnuson-Stevens Fishery Conservation and Management Act (P.L. 94-265 as amended by P.L. 109-479). NOAA Fisheries is the federal agency with delegated authority from the Secretary of Commerce to oversee fishing activities in federal waters. Federal fisheries are generally defined as fishing activities that take place in the U.S. Exclusive Economic Zone (EEZ, between 3 and 200 nautical miles from the coastline). Generally, individual states retain management authority over fishing activities within 3 nautical miles of their coasts.

Regional Fishery Management Councils

- North Pacific
- Pacific
- Western Pacific
- New England
- Mid-Atlantic
- South Atlantic
- Gulf of Mexico
- Caribbean

Nationwide, there are 46 fishery management plans (FMPs)[1] that provide a framework for managing the harvest of 478 fish stocks and stock complexes. These fishery management plans are developed by Regional Fishery Management Councils (FMCs) in each of eight regions nationwide: North Pacific, Pacific, Western Pacific, New England, Mid-Atlantic, South Atlantic, Gulf of Mexico, and Caribbean Regions. Once an FMP is developed, it must be approved by the Secretary of Commerce in consultation with NOAA Fisheries before it is implemented.

There is sufficient information to make an overfishing status determination for 300 out of the 478 stocks and stock complexes (63 percent): 28 are subject to overfishing (9 percent of stocks with known status). The overfished status of 230 stocks (48 percent) is known: 40 stocks (17 percent of stocks with known status) are categorized as overfished.[2]

Transboundary and International Fisheries

NOAA Fisheries is also actively involved in negotiating conservation and management measures, including total allowable catch levels, fishery allocations, and monitoring and control schemes, for internationally shared fisheries resources. Shared fisheries resources include those conducted in areas where the EEZ of the U.S. overlaps with other nations (transboundary areas), and in areas beyond the U.S. EEZ (international waters or the high seas). The Gulf of Alaska and the Gulf of Maine are examples of these transboundary areas. An area in the Bering Sea outside of the EEZs of Canada, Japan, and Russia, called the Donut Hole, is an example of international waters. Loss of sea ice will create new trans-boundary areas and international waters in the Arctic.

Regional Fishery Management Organizations (RFMOs) are multinational organizations with interests in internationally shared fish stocks and associated fishing activities. Primary objectives of these RFMOs are to conduct research, assess, and adopt measures for the conservation and coordinated management of target species such as bigeye tuna. Some RFMOs also collect data, evaluate, and adopt measures for the conservation and scientific assessment of non-target species, also known as bycatch. Non-target species include seabirds, marine mammals, sea turtles, and fish species caught incidentally to target species. The commitment to conserving and protecting all species associated with, or affected by, fishing activities is outlined in the Food and Agriculture Organization's (FAO's) Code of Conduct for Responsible Fisheries established in 1995.

Regional Fishery Management Organizations

NOAA Fisheries is party to eight RFMOs globally and the list by ocean basin is provide below.[3]

Pacific

- Pacific Salmon Commission
- International Pacific Halibut Commission
- Inter-American Tropical Tuna Commission
- Western and Central Pacific Fishery Commission

Atlantic

- International Commission for the Conservation of Atlantic Tuna
- North Atlantic Salmon Conservation Organization
- Northwest Atlantic Fisheries Organization

Antarctic

- Commission for the Conservation of Antarctic Marine Living Resources

[1] Fishery management plans and fishery ecosystem plans for each region covered in this report are listed in their respective sections. The four FMPs developed by the Caribbean Fishery Management Council and the Atlantic Highly Migratory Species FMP developed by NOAA Fisheries are not included in this report.
[2] Source: NOAA Fisheries Office of Sustainable Fisheries, Status of Stocks 2013. http://www.nmfs.noaa.gov/sfa/fisheries_eco/status_of_fisheries/archive/2013/status_of_stocks_2013_web.pdf.
[3] Source: http://www.nmfs.noaa.gov/ia/agreements/regional_agreements/intlagree.html.

Another issue of particular concern for NOAA Fisheries is illegal, unreported, and unregulated (IUU) fishing activities. IUU fishing generally refers to fishing conducted in violation of national laws or internationally agreed conservation and management measures in effect in oceans around the world. IUU fishing can include fishing without a license or quota for certain species, unauthorized transshipments to cargo vessels, failing to report catches or making false reports, keeping undersized fish or fish that are otherwise protected by regulations, fishing in closed areas or during closed seasons, and using prohibited fishing gear.

Experts estimate that the global value of economic losses from IUU fishing range between $10 billion and $23.5 billion annually, representing between 11 and 26 million tons.[4] NOAA Fisheries is actively working bilaterally and multilaterally with other nations on the adoption of strategies to reduce the level of IUU fishing around the world. Such strategies include strengthening enforcement and data collection programs around the world, and restricting port entry and access to port services to vessels included on the IUU lists of RFMOs with U.S. membership.

Threatened and Endangered Species

NOAA Fisheries is also the lead agency for the conservation and protection of marine and anadromous species that fall within the purview of the Endangered Species Act (ESA). Currently, NOAA Fisheries has jurisdiction over 125 marine and anadromous listed species. A list by species group is provided in Table 1.

Table 1. Endangered and Threatened Species under NMFS Jurisdiction[5]

Species Group	Number of Species
Marine and Anadromous Fish	57
Marine Mammals	27
Sea Turtles	16
Marine Invertebrates	24
Plants	1
Total Threatened and Endangered Marine Species	125

In addition to the threatened and endangered marine and anadromous species, NOAA Fisheries also engages in activities for identifying candidate and proposed species. Candidate species are those species that are actively being considered for listing as endangered or threatened under the ESA, as well as those species for which NOAA Fisheries has initiated a status review that it has announced in the Federal Register. Proposed species are those candidate species that were found to warrant listing as either threatened or endangered and were officially proposed as such in a Federal Register notice after the completion of a status review and consideration of other protective measures. Currently there are 26 candidate species for listing and 7 proposed species for listing.

NOAA Fisheries is also responsible for providing protection for marine mammals under the Marine Mammal Protection Act.[6] Enacted in 1972, Congress recognized that marine mammal species or stocks may be in danger of extinction or depletion as a result of human activities; marine mammal species or stocks should not be allowed to fall below their optimum sustainable population levels; measures should be taken to replenish marine mammal species or stocks; there is inadequate knowledge of the marine mammal ecology and population dynamics; and marine mammals have proven to be resources of great international significance. NOAA Fisheries engages in activities such as preventing the harassment, capture, or killing of marine mammals, preparing marine mammal stock assessments, and studying interactions between marine mammals and fisheries.

Essential Fish Habitats

Sustainable commercial and recreational fisheries depend on healthy habitats. These habitats include rivers, estuaries, and the open ocean where marine and anadromous species feed, grow, and reproduce. Consideration of these habitat areas are part of an ecosystem-based management approach for managing fisheries in a more sustainable and holistic manner. Since 1996, federal fishery management plans are required to identify and describe essential fish habitat (EFH) for all federally-managed species. Habitat areas that are necessary for a fish species' growth, reproduction, and development are considered EFH. To the extent practicable, NOAA Fisheries and the FMCs must minimize adverse effects to EFH caused by fishing. Though not required, habitat areas of particular concern (HAPC) can be identified to help focus EFH conservation efforts. The HAPC designation alone does not confer ad-

[4] Agnew DJ, Pearce J, Pramod G, Peatman T, Watson R, Beddington JR, et al. (2009) Estimating the Worldwide Extent of Illegal Fishing. PLoS ONE 4(2): e4570. doi:10.1371/journal.pone.0004570.
[5] See NOAA Fisheries Office of Protected Resources (http://www.nmfs.noaa.gov/pr/species/esa/) for current and proposed ESA species listings.
[6] The U.S. Fish and Wildlife Service provides protection for walrus, manatees, otters, and polar bears.

ditional protection or restrictions to an area, but helps to focus EFH conservation, management, and research priorities. HAPC designation is a valuable way to acknowledge areas where there is detailed information on ecological function and habitat vulnerability, indicating a greater need for conservation and management. To date, approximately 100 HAPCs have been designated including specific coral, seamount, and spawning areas. A recent effort undertaken by NOAA Fisheries was the creation of a Habitat Assessment Improvement Plan[7] to advance NOAA Fisheries' ability to identify EFH and HAPCs and provide the information needed to assess impacts to EFH.

Catch Share Programs

A variety of market-based tools are available to fishery managers, including catch share programs. Catch share programs encompass a range of management strategies that share a common feature: a secure share of fish is dedicated to individual fishermen, cooperatives, fishing communities, and other entities for their exclusive use. In 2010, the NOAA catch share policy[8] was released to encourage well-designed catch share programs to help maintain or rebuild fisheries, and sustain fishermen, communities and vibrant working waterfronts, including the cultural and resource access traditions that have been part of this country since its founding.

Nationwide, there are currently 15 federal catch share programs, which include limited access privilege programs (LAPPs), individual fishing quota programs (IFQs), individual transferable quota programs (ITQs), fishing community development quota programs (CDQs), fishing cooperatives, and fishing sectors.[9] Implementation dates of these programs span three decades, with five programs established in the 1990s and five programs established since 2010 (see Table 2). Nine programs manage a single species or, in some cases, two species but as separate management units; the other six programs manage multiple species. The most programs (six) are in the Alaska Region. In December 2014, the Final Rule implementing the Atlantic Highly Migratory Species Individual Bluefin Quota (IBQ) Program was issued. This new program begins in 2015, bringing the total number of federal catch share programs to 16.

NOAA Fisheries recently initiated an effort to track catch share program performance.[10] Findings from the initial report show that existing catch share programs have ended the race to fish (in their respective fisheries) resulting in longer fishing seasons, safer working conditions, and improved management performance. The report also shows that existing catch share programs have resulted in reduced fishing capacity to better match stock size, a management objective in the majority of catch share programs evaluated. Economic performance for the vessels remaining in the program improved, as measured by such metrics as revenue per vessel and average price. Updated information on selected performance indicators is provided in Table 3. Briefly, results showthat inflation-adjusted revenue from catch share species increased in 12 of the 16 programs and/or sub-components of the catch share program since their initial implementation. In addition, the number of active vessels decreased in all but one program (Central GOA Rockfish) and inflation-adjusted revenue per vessel increased in all programs since their implementation. Further, results show that the 2012 annual catch limit was not exceeded in any catch share program.

Table 2. Existing Catch Share Programs in Federal Fisheries

Region	Program	Year Implemented
Mid-Atlantic	Mid-Atlantic Surfclam & Ocean Quahog ITQ	1990
	Mid-Atlantic Golden Tilefish IFQ	2009
New England	Northeast Multispecies Sectors	2010
	Northeast General Category Atlantic Sea Scallop IFQ	2010
North Pacific	Western Alaska Community Development Quota	1992
	Alaska Halibut and Sablefish IFQ	1995
	American Fisheries Act (AFA) Pollock Cooperatives	1999
	Bering Sea and Aleutian Island (BSAI) Crab Rationalization	2005
	Central Gulf of Alaska (GOA) Rockfish *(pilot implemented in 2007)*	2012
	Non-pollock Trawl Catcher/ Processor Groundfish Cooperatives (Amendment 80)	2008
South Atlantic	South Atlantic Wreckfish ITQ	1992
Gulf of Mexico	Red Snapper IFQ	2007
	Grouper-Tilefish IFQ	2010
Pacific	Pacific Coast Sablefish Permit Stacking	2001
	Pacific Groundfish Trawl Rationalization Program (Whiting and Non-Whiting trawl)	2011

[7] The Habitat Assessment Improvement Plan is available at: http://www.st.nmfs.noaa.gov/st4/documents/habitatAssesmentImprovementPlan_052110.PDF.
[8] See http://www.nmfs.noaa.gov/sfa/management/catch_shares/about/documents/noaa_cs_policy.pdf.
[9] See Section 303A of the Magnuson-Stevens Act for more information on LAPP requirements.
[10] See http://www.st.nmfs.noaa.gov/Assets/economics/catch-shares/.

Table 3. Economic Performance Indicators for U.S. Federal Catch Share Programs (2010 dollars)[11]

Management Context			Participation		Economic Benefits			
	ACL Exceeded		Active Vessels		Total Revenue from Catch Share Species		Revenue per Active Vessel	
	Baseline	2012	Baseline	2012	Baseline	2012	Baseline	2012
Gulf of Mexico								
Grouper-Tilefish	Y	N	631	463	21,597,221	24,492,190	34,227	53,128
Red Snapper	Y	N	482	365	13,239,277	13,667,961	27,467	37,446
Mid-Atlantic								
Golden Tilefish	na	N	14	11	4,434,874	5,243,472	318,920	476,679
Ocean Quahog	N	N	67	30	27,859,765	25,010,255	415,817	833,675
Surfclam	N	N	137	43	37,540,447	27,407,991	274,018	637,395
New England								
General Category Scallop	na	N	271	142	26,902,861	29,430,996	99,273	207,261
Multispecies Sectors	Y	N	415	286	80,508,936	66,379,515	193,997	232,096
North Pacific								
Alaska Halibut	Y	N	3,432	1,013	86,967,782	126,833,314	25,340	125,206
Alaska Sablefish	Y	N	1,139	354	91,122,569	99,894,486	80,002	282,188
AFA Pollock Cooperatives	Y	N	147	103	366,635,287	473,571,987	2,494,118	4,597,786
BSAI Crab Rationalization	Y	N	264	81	165,603,383	201,931,076	627,286	2,492,976
Amendment 80	N	N	22	19	231,967,927	293,325,864	10,543,997	15,438,203
Central GOA Rockfish	Y	N	42	45	11,704,623	19,045,893	278,682	423,242
Pacific								
Pacific Sablefish	na	N	135	97	6,352,641	8,343,940	47,057	86,020
Whiting Trawl	na	N	36	24	9,139,138	20,031,917	253,865	834,663
Non-whiting Trawl	na	N	115	90	28,780,656	25,507,598	250,267	283,418

Other Market-based Management Tools

Vessel or permit buyback programs are another market-based tool used by fishery managers. Under these programs, fishing vessels or permits are purchased by the government to permanently decrease the number of participants in the fishery to ease fishing-related pressure on marine resources. To date, there have been ten buyback programs instituted nationwide. The cost of seven of these buyback programs totaled $397 million.[12] Eighty-five percent of this total cost was funded by loans from the federal government that will be repaid by the commercial fishing industry.

License limitation programs, also known as limited entry programs, are another management tool available to fishery managers. In these programs, the number of fishing vessels allowed to harvest a specific fish stock or stock complex is limited to fishermen or vessels with permission to fish. Unlike catch share programs, license limitation programs have been implemented in almost all federally-managed commercial fisheries and in every region except the Caribbean.

Ecolabels are a market-based tool offered by third-party entities. An ecolabeling program entitles a fishery product to bear a distinctive logo or statement that certifies the fishery resource was harvested in compliance with specified conservation and sustainability standards. It allows the buyer to potentially influence the sustainable harvest of fishery resources through the purchase of such ecolabeled seafood products at a price premium.

Table 4. U.S. Fisheries with MSC Certification[13]

Region	Fishery	Certified
North Pacific	Alaska flatfish - Bering Sea & Aleutian Islands	2010
	Alaska flatfish - Gulf of Alaska	2010
	Alaska Pacific cod - Bering Sea & Aleutian Islands	2010
	Alaska Pacific cod - Gulf of Alaska	2010
	Alaska pollock - Bering Sea & Aleutian Islands	2010
	Alaska pollock - Gulf of Alaska	2010
	American Western Fish Boast Owners Association albacore tuna North Pacific	2010
	US North Pacific halibut	2006
	US North Pacific sablefish	2006
	Alaska salmon	2000
Pacific	American Albacore Fishing Association Pacific albacore tuna - north	2007
	American Albacore Fishing Association Pacific albacore tuna - south	2007
	Oregon dungeness crab	2010
	Oregon pink shrimp	2011
	Pacific hake mid-water trawl	2009
	US West Coast limited entry groundfish trawl	2014
Gulf	Louisiana blue crab	2012
North-east	Maine lobster trap fishery	2013
	US Atlantic spiny dogfish	2012
	US North Atlantic swordfish	2013
	US Atlantic sea scallop	2013

[11] The South Atlantic Wreckfish ITQ is not included due to confidentiality restrictions and the Western Alaska CDQ program was excluded because it is the only CDQ and thus fundamentally different in nature relative to the other programs. In addition, note that some programs did not have a catch quota prior to the catch share program; for these programs, "na" is used to indicate that the question of whether the ACL was exceeded is not applicable.
[12] This total excludes three buyback programs associated with Northwest Pacific salmon disasters in 1994, 1995, and 1998 because data were not available. For current information on fishing capacity reduction, see http://www.nmfs.noaa.gov/mb/financial_services/buyback.htm.
[13] For more information about these fisheries and the Marine Stewardship Council certification process see: https://www.msc.org/.

The Marine Stewardship Council (MSC) has one of the most recognizable ecolabeling programs in the world. There are currently more than 190 fisheries worldwide that meet MSC sustainability standards, 21 of which are U.S. fisheries (see Table 4). Fisheries obtaining MSC certification for the first time in 2013 or 2014 include the U.S. North Atlantic swordfish and West coast groundfish trawl.

COMMERCIAL FISHERIES

Commercial fishermen in the U.S. harvested 9.8 billion pounds of finfish and shellfish in 2013, earning $5.5 billion for their catch. Pacific salmon ($757 million) followed by shrimp ($588 million), sea scallop ($467 million), and American lobster ($460 million) contributed most to total revenue in the U.S. The top three species in terms of pounds landed, walleye pollock (3 billion pounds), menhaden (1.4 billion), and Pacific salmon (1.1 billion), comprised over half of U.S. landings in 2013.

Key U.S. Commercial Species

- American lobster
- Blue crab
- Menhaden
- Pacific halibut
- Pacific salmon
- Sablefish
- Sea scallop
- Shrimp
- Tunas
- Walleye pollock

When looking at key species or species groups, commercial fishermen in Alaska caught the most salmon (just over 1 billion pounds) and earned $680 million for their catch in 2013. Tuna was caught in large numbers in Hawai'i (just under 21 million pounds) and generated $82 million in landings revenue. Maine fishermen contributed most to the total landings of American lobster (127 million pounds) and earned $368 million for their catch in 2013. In Massachusetts, sea scallopers harvested 29 million pounds landed and earned $335 million for their catch. More blue crab was caught in Louisiana (39 million pounds) than any other state, earning fishermen in this state over $51 million. Louisiana also accounted for more than half of the menhaden landed in 2013, with fishermen landing 849 million pounds worth $85 million in dockside revenue. Sea scallop garnered the highest average ex-vessel price per pound ($11.41) from among the key species and species group in 2013, with state-specific prices ranging from $10.18 in New York to $12.27 in Maryland.

Economic Impacts[14]

In this report, the U.S. seafood industry includes the commercial harvest sector, seafood processors and dealers, seafood wholesalers and distributors, importers, and seafood retailers. In 2013, this industry supported 1.35 million full- and part-time jobs and generated $142 billion in sales, $40 billion in income, and almost $60 billion in value added impacts nationwide (see Table 5).

Seafood retailers, which generated the largest job, income and value added impacts, contributed 668,000 jobs, $34 billion in sales impacts, $14 billion in income, and $19 billion in value added impacts to the national economy in 2013 (see Table 5). The seafood import sector, which generated the largest sales impacts, contributed 202,000 jobs, $55 billion in sales, $9 billion in income, and $17 billion in value added impacts. Wholesalers and distributors contributed 60,000 jobs, over $8 billion in sales, $3 billion in income, and $4 billion in value added impacts to the national economy.

Table 5. U.S. Seafood Industry Economic Impacts Trends

	2010	2011	2012	2013
Jobs	1,196,683	1,233,204	1,270,141	1,350,627
Sales (Billions)	$133.1	$129.4	$140.7	$142.2
Income (Billions)	$36.3	$36.6	$38.7	$39.8
Value Added (Billions)	$55.4	$55.3	$59.0	$60.3
Total Revenue (Billions)	$4.5	$5.3	$5.1	$5.6

Employment impacts from the U.S. seafood industry were 6% higher in 2013 than in 2012. Similarly, industry-wide economic impacts in terms of sales (up 1.1%), income (up 2.7%), and value added (up 2.2%) were also higher. Year-over-year increases in economic impacts were concentrated in three sectors: commercial harvesters (employment up 13.1%), retailers (employment up 9.5%), and wholesalers and distributors (employment up 5.0%).

The greatest employment impacts generated by the seafood industry occurred in California, Massachusetts, Florida, and Alaska (see Table 6). The seafood industry supported the fewest jobs in Delaware.

The highest sales impacts were generated by the seafood industry in California with $21 billion in sales followed by Florida and Massachusetts (see Table 7). The importers sector generated the highest level of sales

[14] The NMFS Commercial Fishing Industry Input/Output Model was used to generate the impact estimates (see NMFS Commercial Fishing & Seafood Industry Input/Output Model, available at: www.st.nmfs.noaa.gov/documents/commercial_seafood_impacts_2007-2009.pdf.

impacts in all three states. The lowest sales impacts were generated in Delaware. The greatest value added impacts were generated by the seafood industry in California, Florida, and Massachusetts and Washington. The smallest value added impacts were generated in Delaware.

Table 6. Jobs Supported by the U.S. Seafood Industry

State	Jobs	State	Jobs
U.S.	1,350,627	Virginia	16,162
California	132,035	Georgia	13,763
Massachusetts	100,108	Maryland	12,419
Florida	78,378	Alabama	12,090
Alaska	68,540	Hawai'i	9,959
Washington	64,599	North Carolina	9,579
New York	48,732	Rhode Island	9,560
New Jersey	41,319	Mississippi	6,432
Louisiana	39,743	New Hampshire	5,004
Maine	35,306	Connecticut	2,991
Texas	31,553	South Carolina	1,742
Oregon	21,063	Delaware	406

Table 7. Sales, income and value added impacts generated by the U.S. Seafood Industry, 2013 ($ Million)

State	Sales	Income	Value Added
U.S.	142,249.1	39,756.7	60,309.2
California	21,019.4	4,576.7	7,557.5
Florida	15,319.4	2,878.3	5,136.6
Massachusetts	7,706.1	2,021.5	3,073.3
Washington	7,270.6	2,030.0	3,050.1
New Jersey	6,397.5	1,421.1	2,313.2
New York	5,809.4	1,247.1	2,060.2
Alaska	4,693.0	2,097.4	2,600.6
Texas	2,555.8	754.5	1,123.5
Louisiana	2,074.3	742.8	1,023.0
Georgia	1,932.1	424.9	701.7
Maine	1,914.5	635.4	917.8
Oregon	1,359.7	478.2	669.8
Maryland	1,244.1	320.7	490.6
Virginia	1,148.7	364.7	522.9
Rhode Island	980.9	250.2	389.0
North Carolina	821.5	231.0	343.9
Hawai'i	751.3	236.9	343.1
New Hampshire	626.1	149.1	235.8
Alabama	526.8	200.5	265.6
Connecticut	469.2	99.0	164.6
Mississippi	268.4	107.3	138.8
South Carolina	124.6	40.7	57.9
Delaware	56.3	11.2	18.7

Landings Revenue

Landings revenue in the U.S. totaled $5.5 billion in 2013 (Table 8). This was a 47% increase in nominal value from 2004 levels (an 8% percent increase in real terms, that is, after adjusting for inflation). Landings revenue in 2013 represented a year-over-year increase of 9% from 2012. Finfish landings revenue of $2.7 billion in 2013 represented a 50% increase (9.9% in real terms) from 2004 and a 12% increase from 2012. U.S. shellfish landings revenue totaled just under $2.9 billion in 2013, increasing 45% (8% in real terms) from 2004 to 2013 and a 7% increase from 2012.

The five species with highest landings revenue were Pacific salmon, shrimp, sea scallop, American lobster, and walleye pollock. The landings revenue of these five species groups totaled almost $2.7 billion, or 48% of total revenue. The largest increases in total landings revenue among these species from 2004 to 2013 were experienced by: Pacific salmon (up 150% in nominal terms, 83% in real terms), menhaden (72%, 26% in real terms), and tunas (63%, 20% in real terms). Five of the key species or species groups showed decreases in real revenue over the same 10 year period: Pacific halibut (down 33%, -51% in real terms), sablefish (down 25%, -45% in real terms). Relative to 2012 totals, key species or species groups with the largest increases in total revenue were: Pacific salmon (up 55%), menhaden (up 20%), and walleye pollock (up 18%).

Table 8. Commercial Fisheries Landings Revenue by Region, 2013 ($ Million)

Region	Landings Revenue	Region	Landings Revenue
U.S.	5,556.5	Pacific	829.6
North Pacific	1,903.4	Mid-Atlantic	457.9
New England	1,162.0	South Atlantic	161.2
Gulf of Mexico	936.7	Western Pacific	107.9

Table 9. Commercial Fisheries Landings Revenue by State, 2013 ($ Million)

State	Landings Revenue	State	Landings Revenue
Alaska	1,903.4	Rhode Island	86.4
Massachusetts	566.9	North Carolina	79.1
Maine	473.9	New York	78.3
Louisiana	399.5	Maryland	75.9
Washington	361.4	Alabama	55.4
Texas	267.5	East Florida	48.7
California	255.3	Mississippi	34.7
West Florida	179.5	South Carolina	21.6
Oregon	179.2	New Hampshire	20.2
Virginia	163.3	Connecticut	14.6
New Jersey	132.9	Georgia	11.8
Hawai'i	107.9	Delaware	7.4

Overall, the greatest portion of the nation's landings revenue in 2013 was generated in Alaska ($1.9 billion), which contributed 34% to the U.S. total (see Table 9). More than half of Alaska's landings revenue came from walleye pollock and salmon. Massachusetts ($472 million) and Maine ($401 million) contributed the most to total U.S. shellfish revenue, 16% and 14%, respectively. Sea scallop accounted for the majority of landings revenue in Massachusetts and American lobster accounted for the majority of landings revenue in Maine.

Landings

In 2013, U.S. commercial fishermen landed 9.8 billion pounds of finfish and shellfish – an increase of 1.2% from 2004 and an increase of 5.7% from 2012 (see Table 10). Finfish landings totaled 8.5 billion pounds in 2013, a 0.2% increase from 2004 and a 7% increase from 2012. Over 60% of total catch in 2013 was made up of the ten U.S. key species and species groups. Walleye pollock and menhaden had the highest landings in 2013, with 3 billion pounds and 1.4 billion pounds landed, respectively. These two species accounted for 45% of U.S. landings in 2013.

Table 10. Commercial Fisheries Landings by Region, 2013 (Millions of Pounds)

Region	Landed Weight	Region	Landed Weight
U.S.	9,809.1	New England	635.9
North Pacific	5,886.6	Mid-Atlantic	582.7
Gulf of Mexico	1,392.4	South Atlantic	91.9
Pacific	1,263.4	Western Pacific	32.5

Table 11. Commercial Fisheries Landings by State, 2013 (Millions of Pounds)

State	Landings	State	Landings
Alaska	5,886.6	West Florida	62.4
Louisiana	1,041.2	North Carolina	50.2
Virginia	381.7	Maryland	43.9
California	363.6	New York	33.0
Oregon	339.6	Hawai'i	32.5
Washington	272.6	Alabama	23.1
Maine	265.1	East Florida	21.4
Massachusetts	264.6	Georgia	10.6
Mississippi	180.5	South Carolina	9.7
New Jersey	120.0	New Hampshire	8.3
Rhode Island	90.0	Connecticut	8.0
Texas	85.2	Delaware	4.0

The greatest increases in landings between 2004 and 2013 were experienced by American lobster (66%) and Pacific salmon (45%). All other key species and species groups experienced landing declines over this period.

Tuna landings experienced the smallest decline (1%) while Pacific halibut experienced the largest decline in landings (62%) between 2004 to 2013.The largest increase in landings of key species or species groups between 2012 and 2013 was experienced by Pacific salmon (68%) and the largest decrease was experienced by sea scallop (28%).

Commercial Fisheries Facts

Landings revenue

- The 10 U.S. key species or species groups accounted for 61% of total landings revenue in 2013.
- Finfish and other fishery products ($2.7 billion) contributed slightly less than shellfish ($2.9 billion) to total landings revenue in the U.S. in 2013.
- The top two species, Pacific salmon and shrimp, combined to account for 24% of total commercial fishing revenue.

Landings

- The 10 U.S. key species and species groups accounted for 63% of total landings in 2013.
- Finfish and other fishery products accounted for 87% of total U.S. landings in 2013 or 8.5 billion pounds.
- Walleye pollock (31%) contributed the most to total landings, followed by menhaden (14%) and Pacific salmon (11%).

Prices

- Of the top 10 key species or species groups, sea scallop ($11.41), Pacific halibut ($3.92), and American lobster ($3.08) had the highest national average ex-vessel price per pound in 2013.
- Walleye pollock ($0.14) and menhaden ($0.09) had the lowest ex-vessel price per pound in 2013.

Alaska fishermen harvested the majority (60%) of the nation's total landings, landing 5.9 billion pounds of finfish and shellfish (see Table 11). Alaska also accounted for the majority of finfish landings, 5.8 billion pounds or 68% of the U.S. finfish total. Walleye pollock comprised 51% of Alaska's landings in 2013. More shellfish was landed in California (274 million pounds), Louisiana (169 million pounds), and Maine (146 million pounds) than in any other state. Together they accounted for 46% of all shellfish landed in the U.S. in 2013.

Prices

Of the ten U.S. key species and species groups, sea scallop, Pacific halibut, and American lobster received the highest national average ex-vessel prices in 2013, $11.41 per pound, $3.92 per pound, and $3.08 per pound, respectively. Menhaden and walleye pollock had the lowest ex-vessel prices in 2013 at $0.09 and $0.14 per pound, respectively. Landings of these species were the largest among the U.S. key species and species groups: 3.0 billion pounds of walleye pollock and 1.4 billion pounds of menhaden were landed in 2013.

Over the 10 year period from 2004 to 2013, significant price increases were observed for sea scallop (up 129%, 68% in real terms) and menhaden (up 80%, 32% in real terms). The average ex-vessel price of blue crab (up 70%), Pacific halibut (up 76%), Pacific salmon (up 73%), tunas (up 64%), and walleye pollock (up 75%) also increased substantially since 2004. Prices for blue crab (up 35%) and shrimp (up 22%) had the largest year-over-year increases from 2012 to 2013. Prices for tunas (down 5%), Pacific halibut (down 13%), and sablefish (down 24%) all declined from 2012 to 2013.

RECREATIONAL FISHERIES

In 2013, there were approximately 11 million recreational saltwater anglers across the U.S. who took 72 million saltwater fishing trips around the country. These anglers spent $4.9 billion on fishing trips and $20 billion on durable fishing-related equipment. Recreational fishing activity supported 370,000 jobs nation-wide. Of the U.S. key recreational species or species groups, seatrout (45 million fish), and Atlantic croaker and spot (43 million fish) were the most often caught by saltwater anglers in 2013.

Key U.S. Recreational Species

- Atlantic croaker and spot
- Seatrout
- Little tunny and Atlantic bonito
- Pacific halibut
- Rockfishes and scorpionfishes
- Salmon
- Sharks
- Striped bass
- Summer flounder
- Large Atlantic tunas

Economic Impacts and Expenditures[15]

Economic impacts from recreational fishing activities (impacts from fishing trips and durable equipment combined) supported 370,000 full- and part-time jobs across the U.S. in 2013 (see Table 12). Sales impacts from recreational angling trips and durable expenditures totaled $52 billion and value added impacts totaled $29 billion. Durable equipment impacts contributed most to these totals, accounting for 79% of employment, sales, and value added impacts. Of the three fishing trip modes, private boat-based fishing trips had the greatest economic impact, accounting for 8 percent of sales, jobs, income and value added impacts.

Table 12. Recreational Economic Impacts Trends for the United States

	2010	2011	2012	2013
Jobs	326,188	363,932	380,898	369,779
Sales (Billions)	$49.8	$55.8	$58.4	$52.4
Income (Billions)	$14.6	$18.2	$19.0	$17.9
Value Added (Billions)	$23.2	$29.1	$30.4	$29.0
Total Trips (Millions)	73.5	71.3	72.0	71.9

Table 13. Sales, income and value added impacts generated by the Recreational Fishing Industry, 2013

State	Sales ($ Million)	Income ($ Million)	Value Added ($ Million)
West Florida	9,086.3	3,423.8	5,341.4
East Florida	3,992.4	1,618.0	2,486.5
Louisiana	2,162.5	801.4	1,249.1
Texas	1,697.5	644.5	1,030.3
California	1,679.4	679.7	1,069.5
North Carolina	1,601.5	633.8	989.1
New Jersey	1,534.0	665.0	999.6
Alabama	927.4	358.8	569.1
Virginia	774.3	321.6	516.8
Massachusetts	755.5	349.5	507.2
Alaska	642.4	261.4	386.4
Maryland	606.8	271.7	404.8
Washington	477.2	177.3	299.8
New York	406.5	185.2	274.6
South Carolina	384.4	145.8	231.9
Oregon	327.8	138.0	202.9
Rhode Island	226.1	102.1	155.4
Georgia	214.5	88.6	137.7
Mississippi	146.3	53.6	87.7
Maine	128.2	50.3	77.1
Hawaii	127.2	43.8	69.4
Connecticut	87.2	36.9	62.6
Delaware	83.0	34.3	53.1
New Hampshire	62.8	29.6	41.2

[15] Expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Economic impacts from recreational fishing activities were generated using the NMFS Recreational Economic Impact Model (see The Economic Contribution of Marine Angler Expenditures in the United States, 2011, available at: https://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011).

U.S. anglers spent a total of $4.9 billion on fishing trips and related expenditures in 2013. Of this total, expenditures for private boat fishing trips contributed the most ($2 billion) followed by shore-based fishing trips ($1.7 billion), and for-hire fishing trips ($1.2 billion). Expenditures on fishing-related durable equipment totaled $20.2 billion in 2013. Anglers spent more on boat expenses ($10.3 billion) than any other durable good. Other major expenditures include fishing tackle ($3.8 billion), vehicle expenses ($2.6 billion), and second home expenses ($2 billion).

The highest sales impacts from marine recreational fishing expenditures were generated in West Florida followed by East Florida, Louisiana, Texas, and California (see Table 13). The lowest sales impacts were generated in New Hampshire. The greatest employment impacts from expenditures on saltwater recreational fishing were generated in West Florida followed by East Florida, Louisiana, North Carolina, and Texas (see Tale 14). New Hampshire had the fewest number of jobs supported by recreational fishing with 666 jobs.

Table 14. Jobs Supported by the U.S. Recreational Fishing Industry

State	Jobs	State	Jobs
West Florida	76,236	South Carolina	4,280
East Florida	36,557	Washington	3,847
Louisiana	18,991	New York	3,835
North Carolina	16,150	Oregon	3,458
Texas	14,436	Rhode Island	2,520
California	13,954	Georgia	2,177
New Jersey	13,010	Mississippi	1,583
Alabama	10,163	Maine	1,364
Virginia	7,987	Hawaii	1,071
Massachusetts	6,923	Delaware	875
Maryland	5,869	Connecticut	703
Alaska	5,457	New Hampshire	666

Participation[16]

Nationwide, 10.9 million people participated in marine recreational saltwater fishing in 2013. Approximately 9.3 million of 2013 anglers were residents of a U.S. coastal county and 1.5 million anglers were residents of a non-coastal county. Between 2004 and 2013, the total number of U.S. saltwater anglers fishing in their home states decreased 8%.

Fishing Trips[17]

The total number of fishing trips taken in the U.S. decreased 16% from 2004 to 2013. Relative to 2012, total fishing trips taken in the U.S. increased 1% with the largest increase occurring in the for-hire mode (21%). West Florida, East Florida and California had the greatest number of recreational fishing trips in 2013 (see Table 16).

Table 15. Recreational Fishing Trips by Region (2013 – Millions of Fishing Trips)

Region	Trips
U.S. Total	71.9
Gulf of Mexico	25.2
South Atlantic	16.6
Mid-Atlantic	14.2
Pacific	7.5
New England	6.3
Hawaii	1.5

Table 16. Recreational Fishing Trips by State (2013 – Thousands of Fishing Trips)

State	Trips	State	Trips
West Florida	15,949	South Carolina	1,977
East Florida	8,981	Mississippi	1,761
California	5,519	Hawai'i	1,513
North Carolina	4,968	Washington	1,266
Louisiana	4,661	Rhode Island	1,229
New Jersey	4,364	Connecticut	1,210
New York	3,873	Delaware	765
Alabama	2,862	Oregon	711
Massachusetts	2,939	Georgia	690
Maryland	2,735	Maine	596
Virginia	2,480	New Hampshire	313

Harvest and Release[18]

Among the ten key U.S. recreational species or species groups, seatrout, Atlantic croaker and spot, summer flounder, and striped bass were the most commonly caught by anglers in 2013. These species or groups were caught in large numbers relative to the other species or groups: seatrout (45 million fish), Atlantic croaker and spot (43 million fish), summer flounder (16 million fish), and striped bass (11 million fish). Anglers fishing in the Mid-Atlantic and New England caught most of the Atlantic croaker, summer flounder, and striped bass in 2013, while most seatrout were caught in the Gulf of Mexico and the South Atlantic.

Recreational catch of rockfishes experienced a 49% increase between 2004 and 2013, the largest change during this 10 year time period. Recreational catch of sharks also increased substantially, 33% over the 10 year time period. Striped bass, little tunny and Atlantic bonito, large Atlantic tunas, summer flounder, salmon, and Pacific halibut catch all declined from 2004 to 2013.

[16] Participation estimates include Puerto Rico but do not include Alaska or Texas. Hawai'i is included for 2004-2006 only.
[17] Trip estimates include Puerto Rico but do not include Alaska or Texas. Hawai'i trip estimates are only available for the shore and private boat mode.
[18] Harvest and release estimates include Puerto Rico but do not include Alaska. For Hawai'i, these estimates are only available for the shore and private boat mode.

Recreational Fisheries Facts

Participation

- An average of 11.8 million anglers fished in U.S. annually from 2004 to 2013.
- In 2013, coastal county residents made up 86% of total anglers. These anglers averaged 87% of total anglers annually over the 10 year time period.

Fishing trips

- In the U.S., an average of 78.8 million fishing trips were taken annually from 2004 to 2013.
- Private or rental boat and shore-based fishing trips accounted for 34 million and 34 million fishing trips, respectively, in 2013. Together, these made up 95% of the fishing trips taken in 2013.

Harvest and release

- Seatrout was the most commonly caught key species or species group from 2004 to 2013, averaging 47 million fish caught over the 10 year time period. Of these, 60% were released rather than harvested.
- Of the ten commonly caught key species or species groups, six were released more often than harvested over this time period. The species or species group that was most commonly released was sharks (97% released).
- Salmon (100% harvested), followed by large Atlantic tuna (89% harvested), and rockfishes and scorpionfishes (76% harvested) were key species or groups that experienced the greatest proportion of harvested catch rather than released catch.

Sharks also experienced the largest year over year increase in catch from 2012 to 2013, increasing 58% to 6.6 million fish. A relatively small proportion of sharks caught are retained by recreational fishermen. Recreational catch of striped bass (up 57%), Pacific salmon (up 42%), and Atlantic croaker and spot (up 41%) also increased substantially from 2012 to 2013. Catch of little tunny and Atlantic bonito, sea trout, large Atlantic tunas, and summer flounder all declined from the previous year.

MARINE ECONOMY[19]

In 2012, there were 7.4 million establishments throughout the entire U.S. economy (including marine and non-marine related establishments). These establishments employed nearly 116 million full- and part-time employees and had a total annual payroll of $5.4 trillion. From 2004 to 2012, the number of establishments and employees both increased by less than 1% and total annual payroll increased 27% nationwide. The nation's gross domestic product was over $16 trillion in 2012 and employee compensation was $8.6 trillion.[20]

The Commercial Fishing Location Quotient (CFLQ) provides a measure of the proportional size of this sector in a state's economy relative to the size of the commercial fishing sector in the national economy.[21] The CFLQ is calculated as the ratio of the percentage of regional employment in the commercial fishing sector relative to the percentage of national employment in the commercial fishing sector. The US CFLQ is 1; a state CFLQ less than (greater than) 1 implies that there is less (more) commercial fishing in this state than the national average.

For this report, the marine economy, a subset of the national economy, is comprised of two industry sectors: 1) seafood sales and processing, which includes both employer establishments and nonemployer firms (businesses that have no paid employees and are subject to federal income tax); and 2) transport, support, and marine operations (employer establishments only). These sectors are comprised of several different marine-related industries. The following sections discuss the contribution of these industries to the national marine economy in terms of the number of establishments or firms, employees, and total annual payroll or receipts.

Seafood Sales and Processing

There were 589 employer establishments in seafood product and packaging sector in 2012, a 20% decrease from 2004. These firms employed approximately 31,000 full- and part-time employees in 2012 and had a total annual payroll of $1.2 billion. Relative to 2004 levels, this was a 19% decrease in workers and a 12% decrease in payroll after adjusting for inflation. More

[19] Unless otherwise stated, data is from the U.S. Census Bureau, http://censtats.census.gov/ (accessed September 15, 2014).
[20] U.S. Bureau of Economic Analysis, "Table 1.1.5 Gross Domestic Product" and "Table SA6N Compensation of Employees by NAICS Industry," http://www.bea.gov/iTable/index_nipa.cfm (accessed September 15, 2014).
[21] U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

than one-third of these establishments were located in Alaska (116 establishments) and Washington (90 establishments). In 2012, there were 1,766 nonemployer firms engaged in seafood product preparation and packaging, a 64% increase from 2004 levels. Annual receipts from nonemployer firms in this sector totaled more than $115 million and represent a 24% increase in real terms from 2004. Most of these firms were located in Florida (307 firms), California (151 firms), and New York (133 firms), and Texas (123 firms).

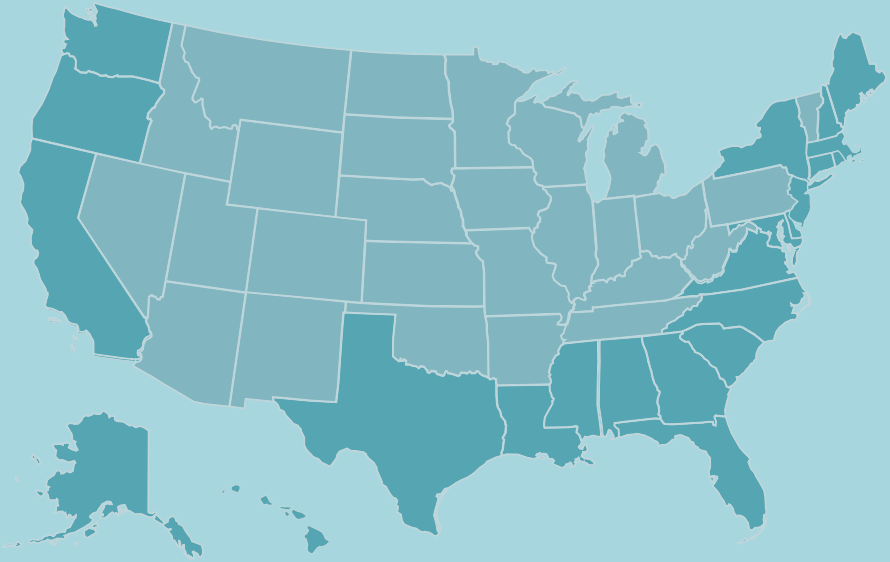
There were 1,954 employer establishments involved in seafood wholesale activities in 2012. These firms employed 20,030 works and had payroll of $867 million. These figures represent an 11% decline in employment and a 5% decline in payroll (after adjusting for inflation) from 2004 to 2012. California (275 establishments), New York (243 establishments), and Florida (226 establishments) had the most establishments in the wholesale seafood sector.

In 2012, there were 1,957 employer establishments in seafood retail sector in 2012, a decline of 9% since 2004. These firms employed approximately 10,293 full- and part-time employees in 2012 (down 4% from 2004) and had a total annual payroll of $238 million (up 5% in real terms from 2004). The employer establishments for retail seafood sales were primarily located in New York (385 establishments), Florida (151), and California (149). There were 2,657 nonemployer firms engaged in retail seafood sales, a 27% increase from 2004 levels. Many of these firms were located in Florida (383 firms), California (236), New York (205), or Louisiana (184).

Transport, Support, and Marine Operations

Within the U.S. transport, support, and marine operations sectors, marinas had by far the highest number of establishments in 2012. There were almost 3,782 marinas that employed nearly 26,000 full- and part-time workers. Compared to 2004 levels, this was a 8% decrease in both establishment and employee numbers. Florida (432) and New York (415) had the most marinas. The ship and boat building sector had both the highest payroll and highest employment among the marine transports, support and operations industries. Payroll in this sector was $7.5 billion (a 16% increase in real terms since 2004) and it had 136,000 employees (a 1% decrease from 2004). Many ship and boat building establishments were located in Florida (258), Washington (141), California (120), and Louisiana (116). California (12,681 employees) and Louisiana (10,933) were the two states with the highest employment in this sector.

Tables | National Overview



2013 Economic Impacts of the United States Seafood Industry (thousands of dollars)

	With Imports				Without Imports			
	Jobs	Sales	Income	Value Added	Jobs	Sales	Income	Value Added
Total Impacts	1,350,627	142,249,051	39,756,670	60,309,157	831,182	54,360,411	19,999,870	28,304,126
Commercial Harvesters	198,647	14,489,402	4,914,438	7,568,450	198,647	14,489,402	4,914,438	7,568,450
Seafood Processors & Dealers	221,448	30,242,095	9,544,208	13,267,517	63,017	8,557,903	2,700,818	3,754,440
Importers	201,735	55,492,874	8,893,792	16,916,658	0	0	0	0
Seafood Wholesalers & Distributors	60,320	8,117,096	2,667,334	3,816,591	29,150	3,922,577	1,288,986	1,844,363
Retail	668,477	33,907,584	13,736,898	18,739,941	540,369	27,390,530	11,095,627	15,136,873

Total Landings Revenue and Landings Revenue of Key Species/Species Groups (thousands of dollars)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total Revenue	3,769,942	3,952,692	4,233,299	4,204,578	4,394,065	3,930,071	4,527,119	5,351,316	5,103,619	5,547,949
Finfish & Other	1,777,802	1,860,060	2,107,034	2,067,933	2,255,004	1,877,866	2,168,796	2,580,323	2,382,328	2,611,300
Shellfish	1,992,140	2,092,632	2,126,265	2,136,645	2,139,061	2,052,205	2,358,323	2,770,993	2,721,291	2,936,649
Key Species										
American lobster	374,306	415,415	404,395	368,528	325,122	311,184	404,092	422,794	429,269	460,077
Blue crab	145,905	140,818	126,034	149,163	160,931	163,291	206,058	181,996	186,882	192,190
Menhaden	75,045	62,520	70,553	92,725	90,995	90,254	92,876	133,015	107,748	129,263
Pacific halibut	176,893	177,599	202,131	227,348	217,726	140,613	207,282	213,465	152,403	117,907
Pacific salmon	302,775	330,816	310,865	381,589	395,253	369,744	554,798	618,332	489,076	756,653
Sablefish	135,316	136,240	132,156	115,610	124,590	128,713	124,385	184,175	140,747	101,614
Sea scallop	320,039	432,514	386,341	386,045	370,053	375,569	455,770	585,157	558,809	467,323
Shrimp	446,043	412,718	452,979	429,993	444,817	379,503	409,334	538,118	506,911	587,867
Tunas	89,952	86,358	86,324	93,875	106,869	96,069	107,966	136,425	163,200	146,227
Walleye pollock	292,027	447,428	380,744	344,550	436,076	254,295	280,413	404,246	453,460	407,844

Total Landings and Landings of Key Species/Species Groups (thousands of pounds)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total Landings	9,688,745	9,712,427	9,552,024	9,313,573	8,360,478	7,900,349	8,046,050	9,894,373	9,280,079	9,809,087
Finfish & Other	8,516,634	8,630,877	8,356,824	8,230,436	7,299,749	6,630,131	6,736,921	8,525,779	7,970,662	8,531,394
Shellfish	1,172,111	1,081,550	1,195,200	1,083,137	1,060,729	1,270,218	1,309,129	1,368,594	1,309,417	1,277,693
Key Species										
American lobster	90,073	87,809	96,119	81,039	87,749	100,775	117,586	126,224	149,542	149,298
Blue crab	174,561	159,242	166,122	157,080	162,384	176,393	199,938	199,218	176,900	134,730
Menhaden	1,495,240	1,243,807	1,306,632	1,484,230	1,344,468	1,407,366	1,259,754	1,899,375	1,410,403	1,389,726
Pacific halibut	79,181	76,264	71,891	69,967	67,000	59,812	56,467	42,864	33,988	30,048
Pacific salmon	738,746	899,759	663,567	886,054	659,196	705,063	787,712	780,073	635,775	1,069,327
Sablefish	52,848	51,093	47,227	43,875	43,285	42,828	40,317	41,279	41,300	39,339
Sea scallop	64,108	56,626	60,123	58,450	53,384	57,921	57,540	59,193	56,875	40,953
Shrimp	316,566	264,163	332,491	273,636	248,647	304,982	249,017	312,185	307,729	290,426
Tunas	56,323	44,252	49,826	50,642	47,882	49,062	48,002	49,846	59,320	55,756
Walleye pollock	3,353,374	3,411,307	3,400,812	3,066,603	2,276,144	1,866,171	1,947,580	2,810,796	2,872,187	3,003,144

Average Annual Price of Key Species/Species Groups (dollars per pound)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
American lobster	4.16	4.73	4.21	4.55	3.71	3.09	3.44	3.35	2.87	3.08
Blue crab	0.84	0.88	0.76	0.95	0.99	0.93	1.03	0.91	1.06	1.43
Menhaden	0.05	0.05	0.05	0.06	0.07	0.06	0.07	0.07	0.08	0.09
Pacific halibut	2.23	2.33	2.81	3.25	3.25	2.35	3.67	4.98	4.48	3.92
Pacific salmon	0.41	0.37	0.47	0.43	0.60	0.52	0.70	0.79	0.77	0.71
Sablefish	2.56	2.67	2.80	2.63	2.88	3.01	3.09	4.46	3.41	2.58
Sea scallop	4.99	7.64	6.43	6.60	6.93	6.48	7.92	9.89	9.83	11.41
Shrimp	1.41	1.56	1.36	1.57	1.79	1.24	1.64	1.72	1.65	2.02
Tunas	1.60	1.95	1.73	1.85	2.23	1.96	2.25	2.74	2.75	2.62
Walleye pollock	0.08	0.09	0.10	0.10	0.14	0.15	0.14	0.13	0.12	0.14

2013 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

		Jobs	Sales	Income	Value Added
Trip Impacts by Fishing Mode	For-Hire	22,567	2,875,378	1,130,112	1,670,702
	Private Boat	29,800	4,413,440	1,416,990	2,449,397
	Shore	28,272	3,800,928	1,250,747	2,113,678
Total Durable Expenditures		289,140	41,351,811	14,053,155	22,755,611
Total Impacts		369,779	52,441,557	17,851,004	28,989,388

2013 Angler Trip & Durable Expenditures (thousands of dollars)[1]

Fishing Mode	Trip Expenditures		Equipment	Durable Goods Expenditures
	Non-residents	Residents	Fishing Tackle	3,799,816
For-Hire	NA	1,165,064	Other Equipment	1,513,454
Private Boat	NA	2,056,589	Boat Expenses	10,266,098
Shore	NA	1,678,855	Vehicle Expenses	2,597,502
Total	NA	4,900,507	Second Home Expenses	2,014,443
			Total Durable Expenditures	20,191,314
Total State Trip and Durable Equipment Expenditures				25,091,821

Recreational Anglers by Residential Area (thousands of anglers)[2]

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Coastal	10,199	11,330	11,644	12,219	10,533	9,268	9,375	9,099	9,384	9,339
Non-Coastal	1,579	1,492	1,685	1,616	1,591	1,747	1,502	1,428	1,558	1,546
Total Anglers	11,779	12,822	13,329	13,835	12,124	11,015	10,877	10,527	10,941	10,884

Recreational Fishing Effort by Mode (thousands of angler-trips)[3]

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
For-Hire	3,424	3,523	3,738	4,179	3,416	3,282	2,601	3,183	3,177	3,855
Private	44,009	43,247	42,718	46,465	44,912	37,649	37,759	35,318	34,705	34,135
Shore	38,017	37,343	38,691	37,024	37,220	33,633	32,104	31,695	32,976	33,882
Total Trips	85,451	84,113	85,147	87,667	85,548	74,563	72,464	70,195	70,857	71,872

Harvest (H) and Release (R) of Key Species Species Groups (thousands of fish)[4]

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Drum (Atlantic croaker and spot)	H	19,796	20,356	22,936	26,567	24,018	15,765	13,356	13,319	11,951	17,632
	R	17,819	23,758	19,378	21,369	24,975	20,371	15,978	18,092	18,621	25,493
Drum (seatrouts)	H	16,953	16,099	18,903	17,563	21,077	20,189	16,739	22,240	20,881	17,562
	R	27,216	30,629	30,345	28,976	32,354	25,807	23,937	28,649	31,557	26,983
Little tunny & Atlantic bonito	H	407	182	313	295	203	233	190	283	386	348
	R	1,101	468	869	1,220	725	808	598	701	853	651
Sharks[5]	H	203	226	172	193	159	148	167	117	111	251
	R	4,790	6,087	5,436	5,996	5,561	5,301	5,214	3,744	4,080	6,387
Striped bass	H	2,621	2,491	2,741	2,449	2,345	1,994	1,977	2,250	1,509	2,148
	R	17,479	18,229	23,418	16,220	12,697	8,118	6,357	6,177	5,384	8,686
Summer flounder	H	4,390	4,105	4,035	3,110	2,363	1,828	1,510	1,845	2,277	2,545
	R	16,059	21,868	17,511	17,626	20,547	22,297	22,227	19,724	14,255	13,618
Tunas (large Atlantic species)[6]	H	774	669	567	730	798	528	595	423	676	644
	R	134	110	137	96	89	55	53	68	52	28
Pacific halibut	H	483	500	463	585	516	440	398	394	388	454
	R	369	380	353	438	359	321	304	311	324	324
Salmon	H	1,433	1,419	821	1,231	695	1,466	700	958	899	1,276
	R	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Rockfishes & scorpionfishes	H	2,595	3,616	2,677	2,453	2,067	2,200	2,418	3,084	3,589	4,130
	R	984	1,348	896	691	636	838	735	680	1,032	1,189

[1] All anglers reported in this table are U.S. residents; NA = not applicable
[2] Participation estimates include Puerto Rico but do not include Alaska or Texas. Hawai'i is included for 2004-2006 only.
[3] Effort estimates include Puerto Rico but do not include Alaska or Texas. Hawai'i effort estimates are only available for the shore and private boat mode.
[4] Harvest and release estimates include Puerto Rico but do not include Alaska. For Hawai'i, these estimates are only available for the shore and private boat mode.
[5] Sharks include species within the requiem shark family, blacktip sharks, Atlantic sharpnose sharks, and unidentified sharks.
[6] Includes all tunas in the thunnus family.

United States Economy (% of national total)

	Establishments (millions)	Employees (millions)	Annual Payroll ($ trillions)	Employee Compensation ($ trillions)	Gross Domestic Product ($ trillions)	Commercial Location Quotient[1]
2004	7.39	115.07	4.25	6.73	12.21	1
2012	7.43	115.94	5.41	8.59	16.14	1
% change	0.59	0.74	0.02	21.69	24.36	--

Seafood Sales & Processing - Nonemployer Firms (thousands of dollars)

		2004	2005	2006	2007	2008	2009	2010	2011	2012
Seafood product prep. & packaging	Firms	1,080	1,110	1,142	1,303	1,308	1,395	1,617	1,757	1,766
	Receipts	78,745	81,871	80,066	88,230	89,670	95,219	104,990	110,745	115,167
Seafood sales, retail	Firms	2,098	2,260	2,089	2,610	2,522	2,455	2,513	2,514	2,657
	Receipts	203,951	210,450	211,186	231,776	233,002	207,139	199,810	212,679	217,702

Seafood Sales & Processing - Employer Establishments (thousands of dollars)

		2004	2005	2006	2007	2008	2009	2010	2011	2012
Seafood product prep. & packaging	Establishments	734	717	670	685	663	645	638	620	589
	Employees	38,102	37,684	35,894	33,169	33,323	30,894	31,789	31,261	30,988
	Payroll	1,151,780	1,180,396	1,205,890	1,196,086	1,161,637	1,091,727	1,116,305	1,200,263	1,196,207
Seafood sales, wholesale	Establishments	2,330	2,314	2,222	2,438	2,063	2,099	2,183	2,287	1,954
	Employees	22,501	22,666	22,013	24,232	20,116	19,290	19,386	20,622	20,030
	Payroll	771,749	781,459	826,720	924,654	782,178	758,332	798,794	848,454	867,179
Seafood sales, retail	Establishments	2,151	2,155	2,115	2,094	2,044	1,967	1,982	1,972	1,957
	Employees	10,714	10,381	10,545	10,380	9,732	9,439	9,857	10,006	10,293
	Payroll	192,187	194,602	200,971	209,404	205,423	211,264	219,045	222,508	237,619

Transport, Support, & Marine Operations - Employer Establishments (thousands of dollars)[2]

		2004	2005	2006	2007	2008	2009	2010	2011	2012
Coastal & Great Lakes freight transportation	Establishments	579	610	579	573	513	513	547	549	496
	Employees	21,928	21,025	22,172	22,568	21,019	20,919	17,528	18,590	19,099
	Payroll	1,179,549	1,232,342	1,376,033	1,552,467	1,694,613	1,470,159	1,288,001	1,400,267	1,467,709
Deep sea freight transportation	Establishments	435	465	456	427	365	376	372	378	375
	Employees	11,314	11,357	11,473	11,308	10,231	11,180	10,288	10,362	12,375
	Payroll	735,804	801,863	825,752	855,683	852,063	863,363	867,797	921,990	1,073,529
Deep sea passenger transportation	Establishments	83	87	87	92	71	78	56	55	58
	Employees	12,017	11,376	11,387	ds	ds	ds	ds	ds	ds
	Payroll	652,443	628,793	667,949	ds	ds	ds	ds	ds	ds
Marinas	Establishments	4,092	4,143	4,025	4,085	3,972	3,891	3,937	3,896	3,782
	Employees	28,100	27,511	28,339	28,788	28,686	26,643	26,657	26,557	25,764
	Payroll	814,821	839,848	894,097	945,355	954,032	905,488	927,499	953,497	913,140
Marine cargo handling	Establishments	551	549	540	552	532	541	507	545	343
	Employees	58,618	59,670	61,905	62,941	63,736	56,386	57,275	59,517	43,824
	Payroll	2,899,703	3,034,672	3,261,953	3,428,126	3,272,723	2,776,791	3,026,861	3,159,964	2,601,146
Navigational services to shipping	Establishments	804	803	802	830	868	846	847	836	850
	Employees	11,881	10,819	12,043	12,997	13,419	12,689	13,529	13,441	12,532
	Payroll	591,510	584,689	699,375	756,552	847,938	826,384	937,980	893,889	838,959
Port & harbor operations	Establishments	234	244	229	223	268	258	287	255	525
	Employees	6,888	7,453	7,002	6,573	5,608	5,100	4,844	4,933	25,396
	Payroll	300,692	319,338	323,554	318,608	282,671	250,358	290,467	306,882	1,345,857
Ship & boat building	Establishments	1,793	1,799	1,764	1,771	1,782	1,615	1,540	1,497	1,560
	Employees	137,633	141,620	142,057	148,864	157,512	137,759	127,691	127,522	136,365
	Payroll	5,499,783	5,654,818	5,877,830	6,405,570	7,269,306	6,674,187	6,529,523	6,845,322	7,543,402

[1] The US Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ less than (greater than) 1 implies that there is less (more) commercial fishing in this state than the national average.
[2] ds = these data are suppressed.