

Fisheries Economics of the United States 2014

Economics and Sociocultural
Status and Trends Series

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National Oceanic and Atmospheric Administration
National Marine Fisheries Service
NOAA Technical Memorandum NMFS-F/SPO-163
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Front cover: Fishing along the Oregon Coast (photo credit: Leif Anderson)

Inside cover: Fishing boats (photo credit: Bill Zahner/NOAA)

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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-163
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U.S. Department of Commerce

Penny Pritzker, Secretary of Commerce

National Oceanic and Atmospheric Administration

Dr. Kathryn D. Sullivan, NOAA Administrator

National Marine Fisheries Service

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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/fus14/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_2014/index

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Wilmington area, North Carolina
(photo credit: NOAA Flickr)

Preface

Fisheries Economics of the United States, 2014

Fisheries Economics of the United States, 2014, 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 2005 to 2014 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

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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 Hibschi (Pacific States Marine Fisheries Commission), and Williams Romberg (Alaska Department of Fish and Game).

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National Overview



NOAA Fisheries personnel measure juvenile salmon, San Francisco Bay
(photo credit: Jeremy Notch)

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, 46 fishery management plans (FMPs) provide a framework for managing the harvest of 469 fish stocks and stock complexes.¹ These fishery management plans are developed by Regional Fishery Management Councils (FMCs) in eight regions nationwide: North Pacific, Pacific, Western Pacific, New England, Mid-Atlantic, South Atlantic, Gulf of Mexico and Caribbean Regions. After an FMP is developed, it must be approved by the Secretary of Commerce in consultation with NOAA Fisheries before it is implemented.

Enough information exists to determine the overfishing status for 308 of the 469 stocks and stock complexes (66%): 26 are subject to overfishing (8% of stocks with known status). The overfished status of 228 stocks (49%) is known: 37 stocks (16% 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 in areas where the EEZ of the U.S. overlaps with other nations (transboundary areas), and in areas beyond the U.S. EEZ, i.e., 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 the EEZs of Canada, Japan, and Russia, called the Donut Hole, is an example of international waters. Loss of sea ice will create new transboundary 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 research, assess and adopt measures for the conservation and coordinated management of target species, such as bigeye tuna. Some RFMOs also collect data and 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.

Another issue of particular concern for NOAA Fisheries is illegal, unreported and unregulated (IUU) fishing activities. IUU fishing generally refers to fishing that violates 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 trans-shipments 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 global economic losses from IUU fishing range from \$10 billion to \$23.5 billion annually, representing between 11 and 26 million tons of fish.³

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 2014. http://www.nmfs.noaa.gov/sfa/fisheries_eco/status_of_fisheries/archive/2014/2014_status_of_stocks_final_web.pdf.

³ 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.

NOAA Fisheries is actively collaborating with other federal agencies as part of the National Ocean Council Committee on IUU Fishing and Seafood Fraud. This network of agencies work together to implement measures outlined in an action plan developed by the Presidential Task Force on Combatting IUU Fishing and Seafood Fraud. The plan includes actions that will strengthen enforcement; create and expand partnerships with state and local governments, industry, and non-governmental organizations; and create a risk-based traceability program to track seafood from harvest to entry into U.S. commerce. The plan also highlights ways in which the United States will work with our foreign partners to strengthen international governance, enhance cooperation, and build capacity to combat IUU fishing and seafood fraud.

Regional Fishery Management Organizations

NOAA Fisheries participates in eight RFMOs globally. Each RFMO is listed by ocean basin below.⁴

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 Tunas
- North Atlantic Salmon Conservation Organization
- Northwest Atlantic Fisheries Organization

Antarctic

- Commission for the Conservation of Antarctic Marine Living Resources

Saltwater Recreational Fisheries Policy

In February 2015, NOAA Fisheries established a formal National Saltwater Recreational Fisheries Policy to broadly guide future actions and better integrate recreational fishing with NOAA Fisheries' mission. The Policy focuses on six guiding principles: 1) support ecosystem conservation and enhancement; 2) promote public access to quality recreational fishing opportunities; 3) coordinate with state and federal management entities; 4) advance innovative solutions to evolving science, management and environmental challenges; 5) provide scientifically sound and trusted social, cultural, economic and ecological information; and 6) communicate and engage with the recreational fishing public.

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). In 2014, NOAA Fisheries listed 20 coral species as threatened under the ESA, which brought the number of marine and anadromous species under NOAA Fisheries jurisdiction to 130 (see Table 1).

Table 1. Endangered and Threatened Species under NOAA Fisheries Jurisdiction⁵

| Species Group | Number of Species |
|--|-------------------|
| Marine and Anadromous Fish | 58 |
| Marine Mammals | 27 |
| Sea Turtles | 17 |
| Marine Invertebrates | 27 |
| Plants | 1 |
| Total Threatened and Endangered Marine Species | 130 |

In addition to threatened and endangered marine and anadromous species, NOAA Fisheries also helps identify candidate and proposed species. Candidate species are actively being considered for listing as endangered or threatened under the ESA. These species also include those for which NOAA Fisheries has initiated a status review that it has announced in the Federal Register. Proposed species are candidate species that were found to warrant listing as either threatened or endangered. These species were officially proposed as such in a Federal Register notice after the completion of a status review and consideration of other protective measures. Currently, 15 candidate species and 28 proposed species are under consideration for listing.

NOAA Fisheries is also responsible for protecting marine mammals under the Marine Mammal Protection Act.⁶ Enacting this act 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

⁴ Source: http://www.nmfs.noaa.gov/ia/agreements/regional_agreements/intlagree.html.

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 protects walrus, manatees, otters and polar bears.

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 is 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 additional 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 detailed information exists 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 The goal of this plan is 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 was released to

encourage well-designed catch share programs to help maintain or rebuild fisheries.⁸ The policy also aims to sustain fishermen, communities and vibrant working waterfronts, including the cultural and resource-access traditions that have been part of this country since its founding.

Currently, there are 16 federal catch share programs nationwide. These programs 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 six programs established since 2010 (see Table 2). 10 programs manage a single species or, in some cases, two species but as separate management units; the other six programs manage multiple species. Most of the programs (six) operate in the Alaska Region.

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 |
| | Northeast Multispecies Sectors | 2010 |
| New England | Northeast General Category Atlantic Sea Scallop IFQ | 2010 |
| | Western Alaska Community Development Quota | 1992 |
| North Pacific | 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 (<i>pilot implemented in 2007</i>) | 2012 |
| | Non-Pollock Trawl Catcher/Processor Groundfish Cooperatives (Amendment 80) | 2008 |
| | 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 |
| Atlantic | Highly Migratory Species Individual Bluefin Quota Program | 2016 |

⁷ The Habitat Assessment Improvement Plan is available at: http://www.st.nmfs.noaa.gov/st4/documents/habitatAssesmentImprovement-Plan_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.

Table 3. Economic Performance Indicators for U.S. Federal Catch Share Programs (2013 dollars)¹⁰

| | Management Context | | Participation | | Economic Benefits | | | |
|---------------------------|--------------------|------|----------------|------|--|-------------|---------------------------|------------|
| | ACL Exceeded | | Active Vessels | | Total Revenue from Catch Share Species | | Revenue per Active Vessel | |
| | Baseline | 2013 | Baseline | 2013 | Baseline | 2013 | Baseline | 2013 |
| Gulf of Mexico | | | | | | | | |
| Grouper-Tilefish | Y | N | 631 | 430 | 22,771,411 | 25,498,029 | 36,088 | 59,298 |
| Red Snapper | Y | N | 482 | 360 | 13,958,514 | 21,108,505 | 28,960 | 58,635 |
| Mid-Atlantic | | | | | | | | |
| Golden Tilefish | na | N | 14 | 10 | 4,707,700 | 5,724,782 | 336,264 | 572,478 |
| Ocean Quahog | N | N | 67 | 27 | 29,406,847 | 23,879,904 | 438,908 | 884,441 |
| Surfclam | N | N | 137 | 40 | 39,625,107 | 28,776,586 | 289,234 | 719,415 |
| New England | | | | | | | | |
| General Category Scallop | na | N | 271 | 138 | 28,366,002 | 29,451,902 | 104,672 | 213,420 |
| Multispecies Sectors | Y | Y | 417 | 231 | 86,314,501 | 57,236,554 | 206,989 | 247,777 |
| North Pacific | | | | | | | | |
| Alaska Halibut | Y | N | 3,432 | 937 | 91,801,359 | 101,162,242 | 26,749 | 107,964 |
| Alaska Sablefish | Y | N | 1,139 | 331 | 92,118,241 | 70,897,550 | 80,876 | 214,192 |
| AFA Pollock Cooperatives | Y | N | 147 | 100 | 248,578,994 | 360,423,055 | 1,691,014 | 3,604,231 |
| BSAI Crab Rationalization | Y | N | 264 | 75 | 174,706,605 | 190,034,267 | 661,767 | 2,533,790 |
| Amendment 80 | N | N | 22 | 18 | 244,617,707 | 220,396,418 | 11,118,987 | 12,244,245 |
| Central GOA Rockfish | Y | Y | 42 | 57 | 6,535,212 | 9,827,675 | 155,600 | 172,415 |
| Pacific | | | | | | | | |
| Pacific Sablefish | na | N | 135 | 91 | 6,701,698 | 5,358,488 | 49,642 | 58,884 |
| Whiting Trawl | na | N | 36 | 24 | 9,635,971 | 26,537,871 | 267,666 | 1,105,745 |
| Non-Whiting Trawl | na | N | 115 | 86 | 30,345,264 | 27,329,725 | 263,872 | 317,788 |

NOAA Fisheries recently initiated an effort to track catch share program performance.¹¹ 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 show that inflation-adjusted revenue from catch share species increased in nine of the 16 programs and/or sub-components of the programs since their implementation. In addition, the number of active vessels decreased in all but one program (Central GOA Rockfish) while inflation-adjusted revenue per active vessel increased in all programs since their implementation. Further, results show that the annual catch limit (ACL) was exceeded for two stocks in 2013: witch flounder under the New England Multispecies Sectors pro-

gram and Central Gulf of Alaska shortraker rockfish under the Central Gulf of Alaska Rockfish program.

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. Doing so permanently decreases the number of participants in the fishery and eases fishing-related pressure on marine resources. To date, 10 buyback programs have been 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 (LLPs), 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. LLPs have been implemented in almost all federally managed commercial fisheries and in every region except the Caribbean.

¹⁰ The South Atlantic Wreckfish ITQ is not included due to confidentiality restrictions. The Western Alaska CDQ program was excluded because it is the only CDQ and thus fundamentally different from 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" indicates that the question of whether the ACL was exceeded is not applicable.

¹¹ See <http://www.st.nmfs.noaa.gov/Assets/economics/catch-shares/>.

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.

Ecolabels are market-based tools 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.

The Marine Stewardship Council (MSC) has one of the most recognizable ecolabeling programs in the world. Currently, more than 190 fisheries worldwide meet MSC sustainability standards, 20 of which are U.S. fisheries (see Table 4). Fisheries obtaining MSC certification for the first time in 2014 include the West Coast Groundfish Trawl.

Table 4. U.S. Fisheries with MSC Certification¹³

| 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 Boat Owners Association albacore tuna North Pacific | 2010 |
| | U.S. North Pacific halibut | 2006 |
| | U.S. 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 pink shrimp | 2011 |
| | Pacific hake mid-water trawl | 2009 |
| | U.S. West Coast limited entry groundfish trawl | 2014 |
| Gulf | Louisiana blue crab | 2012 |
| North-east | Maine lobster trap fishery | 2013 |
| | U.S. Atlantic spiny dogfish | 2012 |
| | U.S. North Atlantic swordfish | 2013 |
| | U.S. Atlantic sea scallop | 2013 |

COMMERCIAL FISHERIES

Commercial fishermen in the U.S. harvested 9.4 billion pounds of finfish and shellfish in 2014, earning \$5.5 billion for their catch. Contributing the most to total U.S. revenue were shrimp (\$702 million), followed by Pacific salmon (\$617 million), American lobster (\$567 million) and sea scallop (\$424 million). The top three species in terms of pounds landed included walleye pollock (3.1 billion pounds), menhaden (1.2 billion) and Pacific salmon (720 million). These species made up more than half of U.S. landings in 2014.

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 (683 million pounds) and earned \$546 million for their catch in 2014. Tuna was caught in large numbers in Hawai'i (20 million pounds) and generated \$74 million in landings revenue. Maine fishermen contributed the most to American lobster landings (124 million pounds) and earned \$460 million for their catch in 2014. In Massachusetts, sea scallopers harvested 21 million pounds landed and earned \$272 million for their catch. More blue crab was caught in Louisiana (40 million pounds) than in any other state, earning over \$61 million. Louisiana also accounted for more than half of the menhaden landed in 2014, with fishermen landing 585 million pounds worth \$63 million in dockside revenue. Sea scallop garnered the highest average ex-vessel price per pound (\$12.55) from among the key species and species group in 2014, with state-specific prices ranging from \$11.34 in New York to \$12.85 in New Hampshire.

Economic Impacts

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.¹⁴ In 2014, this industry supported 1.4 million full- and part-time jobs and generated \$153 billion in sales, \$42 billion in income and \$64 billion in value-added impacts nationwide (see Table 5).

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

| | 2011 | 2012 | 2013 | 2014 |
|--------------------------|-----------|-----------|-----------|-----------|
| Jobs | 1,233,204 | 1,270,141 | 1,350,627 | 1,394,833 |
| Sales (Billions) | \$129.4 | \$140.7 | \$142.2 | \$153.3 |
| Income (Billions) | \$36.6 | \$38.7 | \$39.8 | \$42.0 |
| Value-Added (Billions) | \$55.3 | \$59.0 | \$60.3 | \$64.1 |
| Total Revenue (Billions) | \$5.3 | \$5.1 | \$5.6 | \$5.5 |

Seafood retailers generated the largest economic impacts, contributing 678,000 jobs, \$35 billion in sales impacts, \$14 billion in income, and \$19 billion in value-added

¹³ For more information about these fisheries and the Marine Stewardship Council certification process, see <https://www.msc.org/>.

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 to the national economy in 2014. The seafood import sector generated the second largest economic impacts, contributing 227,000 jobs, \$62 billion in sales, \$10 billion in income and \$19 billion in value-added impacts. Seafood dealers and processors contributed 241,000 jobs, \$33 billion in sales, \$10 billion in income, and \$14 billion in value-added impacts to the national economy.

Employment impacts from the U.S. seafood industry were 3 percent higher in 2014 than in 2013. Similarly, industry-wide economic impacts in terms of sales (8%), income (6%), and value added (6%) were also higher. Year-over-year increases in job impacts were concentrated in three sectors: seafood importers (13%), dealers and processors (9%), and wholesalers and distributors (5%).

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

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

| State | Jobs | State | Jobs |
|---------------|-----------|----------------|--------|
| U.S. | 1,394,833 | Virginia | 17,253 |
| California | 143,440 | Alabama | 15,069 |
| Massachusetts | 97,761 | Maryland | 14,636 |
| Florida | 92,858 | Georgia | 13,998 |
| Washington | 63,382 | North Carolina | 11,451 |
| Alaska | 60,749 | New Hampshire | 11,217 |
| New York | 56,735 | Rhode Island | 10,174 |
| New Jersey | 44,433 | Hawaii | 9,546 |
| Louisiana | 44,066 | Mississippi | 4,714 |
| Maine | 41,314 | Connecticut | 2,763 |
| Texas | 33,880 | South Carolina | 2,035 |
| Oregon | 20,051 | Delaware | 456 |

The highest sales, income and value-added impacts were generated by the seafood industry in California with \$23 billion in sales followed by Florida and Massachusetts (see Table 7). The importers sector generated the highest level of sales impacts in all three states.

Landings Revenue

Landings revenue in the U.S. totaled \$5.5 billion in 2014 (Table 8). This was a 38 percent increase in nominal value from 2005 levels (an 18% increase in real terms after adjusting for inflation). Landings revenue in 2014 represented a year-over-year decrease of 1 percent from 2013.

Table 7. Sales, Income and Value-Added Impacts Generated by the U.S. Seafood Industry, 2014 (\$ thousands)

| State | Sales | Income | Value Added |
|----------------|-------------|------------|-------------|
| U.S. | 153,341,370 | 41,955,584 | 64,070,881 |
| California | 23,195,894 | 5,017,023 | 8,305,666 |
| Florida | 18,317,052 | 3,434,238 | 6,135,060 |
| Massachusetts | 7,954,047 | 2,045,415 | 3,132,490 |
| Washington | 7,330,457 | 2,015,266 | 3,041,830 |
| New Jersey | 6,862,897 | 1,529,212 | 2,486,353 |
| New York | 6,858,434 | 1,466,405 | 2,426,360 |
| Alaska | 4,213,515 | 1,872,175 | 2,317,288 |
| Texas | 2,857,586 | 826,213 | 1,238,477 |
| Maine | 2,303,292 | 755,955 | 1,094,928 |
| Louisiana | 2,220,879 | 816,203 | 1,115,858 |
| Georgia | 1,916,044 | 426,208 | 700,572 |
| New Hampshire | 1,582,868 | 359,000 | 578,673 |
| Maryland | 1,461,779 | 378,307 | 577,856 |
| Oregon | 1,404,355 | 469,255 | 665,609 |
| Virginia | 1,256,929 | 396,372 | 568,765 |
| Rhode Island | 1,096,821 | 273,316 | 428,503 |
| North Carolina | 989,955 | 278,195 | 414,144 |
| Hawaii | 743,204 | 230,799 | 335,792 |
| Alabama | 660,627 | 251,520 | 333,185 |
| Connecticut | 429,184 | 90,981 | 151,035 |
| Mississippi | 198,608 | 79,501 | 102,731 |
| South Carolina | 170,997 | 50,013 | 73,648 |
| Delaware | 72,919 | 13,996 | 23,878 |

Table 8. Commercial Fisheries Landings Revenue by Region, 2014 (\$ million)

| Region | Landings Revenue | Region | Landings Revenue |
|----------------|------------------|-----------------|------------------|
| U.S. | 5,473 | Pacific | 719 |
| North Pacific | 1,712 | Mid-Atlantic | 471 |
| New England | 1,201 | South Atlantic | 184 |
| Gulf of Mexico | 1,028 | Western Pacific | 101 |

Finfish landings revenue of \$2.4 billion in 2014 represented a 29 percent increase (10% in real terms) from 2005 and a 9 percent decrease from 2013. U.S. shellfish landings revenue totaled \$3.1 billion in 2014, increasing 46 percent (24% in real terms) from 2005 and 5 percent from 2013.

The five species with highest landings revenue were shrimp, Pacific salmon, American lobster, sea scallop and walleye pollock. The landings revenue of these five species groups totaled \$2.7 billion, or 50 percent of total revenue. The largest increases in total landings revenue among these species from 2005 to 2014 were experienced by Pacific salmon (86% in nominal terms, 58% in real terms); shrimp (70%, 45% in real terms); and menhaden (67%, 42% in real terms). Three of the key

species or species groups showed decreases in revenue over the same 10-year period: Pacific halibut (-35%, -45% in real terms); sablefish (-19%, -31% in real terms); and sea scallop (-2%, -17% in real terms). Compared with 2013 totals, key species or species groups with the largest increases in total revenue were: American lobster (23%), shrimp (18%), and blue crab and sablefish (both up 9%).

Overall, Alaska earned the greatest share of the nation's landings revenue in 2014 (\$1.7 billion), contributing 31 percent to the U.S. total (see Table 9). More than half of Alaska's landings revenue came from walleye pollock and salmon. Massachusetts (\$420 million) and Maine (\$497 million) contributed the most to total U.S. shellfish revenue, 14 percent and 16 percent, respectively. Sea scallop accounted for the majority of landings revenue in Massachusetts, while American lobster accounted for the majority of landings revenue in Maine.

Table 9. Commercial Fisheries Landings Revenue by State, 2014 (\$ million)

| State | Landings Revenue | State | Landings Revenue |
|---------------|------------------|----------------|------------------|
| Alaska | 1,712 | North Carolina | 94 |
| Maine | 549 | Maryland | 90 |
| Massachusetts | 525 | Rhode Island | 86 |
| Louisiana | 451 | Alabama | 69 |
| Washington | 326 | New York | 54 |
| Texas | 278 | East Florida | 53 |
| California | 235 | New Hampshire | 27 |
| West Florida | 203 | Mississippi | 26 |
| Virginia | 168 | South Carolina | 21 |
| Oregon | 158 | Georgia | 15 |
| New Jersey | 152 | Connecticut | 14 |
| Hawaii | 101 | Delaware | 7 |

Landings

In 2014, U.S. commercial fishermen landed 9.4 billion pounds of finfish and shellfish—a decrease of 3 percent from 2005 and of 4 percent from 2013 (see Table 10). Finfish landings totaled 8.2 billion pounds in 2014, a 5 percent decrease from 2005 and a 4 percent decrease from 2013. Over 60 percent of total catch in 2014 was made up of the 10 U.S. key species and species groups. Walleye pollock and menhaden had the highest landings in 2014, with 3.1 billion pounds and 1.2 billion pounds landed, respectively. These two species accounted for 46 percent of U.S. landings in 2014.

Alaska fishermen harvested the majority (60%) of the nation's total landings, landing 5.7 billion pounds of finfish and shellfish (see Table 11). Alaska also accounted for the majority of finfish landings, 5.6 billion pounds or 68 percent of the U.S. finfish total. Walleye pollock comprised 55 percent of Alaska's landings in 2014. More shellfish were landed in California (260 million pounds), Louisiana (171 million pounds) and Maine (132 million pounds) than in any other state. Together they accounted for 45 percent of all shellfish landed in the U.S. in 2014.

Table 10. Commercial Fisheries Landings by Region, 2014 (millions of pounds)

| Region | Landings | Region | Landings |
|----------------|----------|-----------------|----------|
| U.S. | 9,410 | New England | 643 |
| North Pacific | 5,671 | Mid-Atlantic | 591 |
| Gulf of Mexico | 1,144 | South Atlantic | 105 |
| Pacific | 841 | Western Pacific | 33 |

Table 11. Commercial Fisheries Landings by State, 2014 (millions of pounds)

| State | Landings | State | Landings |
|----------------|----------|--------------------|----------|
| Alaska | 5,671 | South Carolina | 73 |
| Maine | 778 | Georgia | 62 |
| East Florida | 388 | Mississippi | 49 |
| Louisiana | 358 | Rhode Island | 33 |
| Texas | 292 | New York | 26 |
| New Hampshire | 274 | New Jersey | 25 |
| California | 260 | Oregon | 23 |
| North Carolina | 191 | Hawaii | 11 |
| Alabama | 191 | Washington | 10 |
| Massachusetts | 124 | Florida West Coast | 9 |
| Virginia | 91 | Connecticut | 8 |
| Maryland | 76 | Delaware | 4 |

From 2005 to 2014, landings increased for five of the key species/species groups. The largest increases were for American lobster (69%), tunas (33%) and shrimp (20%). Pacific halibut (-70%), sea scallop (-40%), and Pacific sablefish (-31%) experienced the largest decline in landings during this period. From 2013 to 2014, the largest increase in landings of key species/species groups was experienced by shrimp (8%). The largest decrease was experienced by Pacific salmon (-33%), with the latter trend largely attributable to the biennial cycle of pink salmon, which tends to have weaker runs in even-numbered years. The 2013 pink salmon landings were the highest ever recorded for Alaska.

Prices

Of the 10 U.S. key species and species groups, sea scallop, Pacific halibut and American lobster received the highest national average ex-vessel prices in 2014 at \$12.55 per pound, \$4.98 per pound and \$3.83 per pound, respectively. Menhaden and walleye pollock had the lowest ex-vessel prices in 2014 at \$0.09 and \$0.13 per pound, respectively. Landings of these species were the largest among the U.S. key species and species groups: 3.1 billion pounds of walleye pollock and 1.2 billion pounds of menhaden were landed in 2014.

Commercial Fisheries Facts

Landings Revenue

- The 10 U.S. key species or species groups accounted for 62 percent of total landings revenue in 2014.
- Finfish and other fishery products (\$2.4 billion) contributed slightly less than shellfish (\$3.1 billion) to total landings revenue in the U.S. in 2014.
- The top two species combined, Pacific salmon and shrimp, accounted for 24 percent of total commercial fishing revenue.

Landings

- The 10 U.S. key species and species groups accounted for 61 percent of total landings in 2014.
- Finfish and other fishery products accounted for 87 percent of total U.S. landings in 2014 or 8.2 billion pounds.
- Walleye pollock (33%) contributed the most to total landings, followed by menhaden (12%) and Pacific salmon (8%).

Prices

- Of the top 10 key species or species groups, sea scallop (\$12.55), Pacific halibut (\$4.98), and American lobster (\$3.83) had the highest national average ex-vessel price per pound in 2014.
- Walleye pollock (\$0.13) and menhaden (\$0.09) had the lowest ex-vessel price per pound in 2014.

Over the 10-year period from 2005 to 2014, significant price increases were observed for Pacific salmon (132%, 100% in real terms), Pacific halibut (114%, 82% in real terms), and menhaden (80%, 50% in real terms). The ex-vessel prices of blue crab (76%, 49% in real terms) and sea scallop (64%, 40% in real terms) also increased substantially since 2005. Prices for Pacific halibut (27%), American lobster (24%), and sablefish (22%) had the largest year-over-year increases from 2013 to 2014. Only two of the key species/species groups experienced a price decline from 2013 to 2014: tunas fell 12 percent and walleye pollock fell 7 percent.

RECREATIONAL FISHERIES

In 2014, approximately 11 million recreational saltwater anglers across the U.S. took 68 million saltwater fishing trips around the country. These anglers spent \$4.9 billion on fishing trips and \$28 billion on durable fishing-related equipment. These expenditures contributed \$60.6 billion in sales impacts to the U.S. economy, generated \$35.5 billion in value-added impacts, and supported approximately 439,000 jobs. Of the U.S. key recreational species or species groups, drum (Atlantic croaker and spot, 33.8 million fish), drum (seatrouts, 24.5 million fish), and summer flounder (19.5 million fish) were the most of 10 caught by recreational saltwater anglers in 2014.

Key U.S. Recreational Species

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

Economic Impacts and Expenditures

Economic impacts from recreational fishing activities^{15,16} (impacts from fishing trips and durable equipment combined) supported 439,000 full- and part-time jobs across the U.S. in 2014 (see Table 12). Sales impacts from recreational angling trips and durable expenditures totaled \$60.6 billion, and value-added impacts totaled \$35.5 billion.

¹⁵ Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/Marine-Angler-Durable-Expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

¹⁶ 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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>) and IMPLAN version 3.1.1001.12.

Durable equipment impacts contributed more than trip impacts to these totals, accounting for 82 percent 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 6 percent of employment, 7 percent of sales and 6 percent of value-added impacts.

Table 12. Recreational Economic Impacts Trends for the United States (\$ billions)

| | 2011 | 2012 | 2013 | 2014 |
|------------------------|---------|---------|---------|---------|
| Number of Jobs | 363,932 | 425,321 | 420,191 | 438,590 |
| Sales | \$55.80 | \$58.80 | \$58.10 | \$60.60 |
| Income | \$18.20 | \$21.40 | \$21.10 | \$22.00 |
| Value-Added | \$29.10 | \$34.40 | \$34.00 | \$35.50 |
| Total Trips (millions) | 71.3 | 72.0 | 71.9 | 68.0 |

U.S. anglers spent \$4.9 billion on fishing trips and related expenditures in 2014. This total includes private boat fishing (\$2 billion), shore-based fishing trips (\$1.6 billion) and for-hire fishing trips (\$1.3 billion). Expenditures on fishing-related durable equipment totaled \$28 billion in 2014. Anglers spent more on boat expenses (\$16.3 billion) than any other durable goods. Other major expenditures include fishing tackle (\$3.9 billion), vehicle expenses (\$3.7 billion), and second home expenses (\$2.1 billion).

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

Table 13. Jobs Supported by the U.S. Recreational Fishing Industry

| State | Jobs | State | Jobs |
|----------------|--------|---------------|-------|
| West Florida | 70,109 | Washington | 6,180 |
| East Florida | 44,789 | Virginia | 5,218 |
| California | 22,737 | Alaska | 5,167 |
| New Jersey | 19,962 | Rhode Island | 4,439 |
| Texas | 16,496 | Mississippi | 4,174 |
| North Carolina | 16,007 | Oregon | 3,333 |
| Louisiana | 15,241 | Connecticut | 2,993 |
| Massachusetts | 14,264 | Georgia | 2,145 |
| Alabama | 14,124 | Delaware | 1,562 |
| New York | 9,561 | Hawai'i | 1,061 |
| Maryland | 7,721 | Maine | 1,051 |
| South Carolina | 6,224 | New Hampshire | 563 |

Table 14. Sales, Income and Value-Added Impacts Generated by the Recreational Fishing Industry, 2014 (\$ thousands)

| State | Sales | Income | Value Added |
|----------------|-----------|-----------|-------------|
| West Florida | 7,467,774 | 3,161,122 | 4,868,743 |
| East Florida | 4,782,488 | 2,022,279 | 3,122,289 |
| California | 2,657,497 | 1,139,897 | 1,777,155 |
| New Jersey | 2,036,835 | 956,242 | 1,456,978 |
| Texas | 1,825,290 | 757,027 | 1,205,146 |
| Louisiana | 1,619,677 | 662,470 | 1,029,281 |
| North Carolina | 1,529,378 | 636,034 | 989,793 |
| Massachusetts | 1,391,996 | 688,503 | 996,280 |
| Alabama | 1,070,579 | 540,257 | 827,849 |
| New York | 976,928 | 466,515 | 718,728 |
| Maryland | 726,850 | 338,785 | 513,107 |
| Washington | 690,425 | 287,917 | 477,561 |
| Alaska | 588,970 | 240,294 | 357,343 |
| South Carolina | 545,375 | 219,815 | 344,307 |
| Virginia | 473,659 | 212,615 | 335,482 |
| Rhode Island | 421,355 | 199,243 | 300,928 |
| Mississippi | 374,063 | 157,772 | 247,281 |
| Oregon | 297,993 | 143,382 | 203,335 |
| Connecticut | 289,927 | 137,757 | 215,821 |
| Georgia | 189,737 | 88,010 | 135,562 |
| Delaware | 142,279 | 61,959 | 98,343 |
| Hawai'i | 127,440 | 44,281 | 70,021 |
| Maine | 84,955 | 35,676 | 55,515 |
| New Hampshire | 52,693 | 25,375 | 35,185 |

Participation

Nationwide, 10.5 million recreational saltwater anglers fished in their home states in 2014.¹⁷ Approximately 9 million of these anglers were residents of a U.S. coastal county; 1.5 million anglers were residents of a non-coastal county. Between 2005 and 2014, there was a 19 percent decrease in the total number of U.S. anglers fishing in their home states. There was a year-over-year 4 percent decrease in the number of anglers who fished in their home states between 2013 and 2014.

Fishing Trips

Nationwide, anglers took approximately 68 million saltwater fishing trips around the country (see Table 15).¹⁸ West Florida (15 million trips) and East Florida (10 million trips) had the highest number of recorded trips (see Table 16). The total number of fishing trips taken in the U.S. decreased 19 percent from 2005 to 2014. Compared with 2013, total fishing trips taken in the U.S. decreased 5 percent, and the largest increase occurred in the for-hire mode (8%).

¹⁷ Participation estimates include Puerto Rico but do not include Alaska or Texas. Hawai'i is included for 2004-2006 only.

¹⁸ Trip estimates include Puerto Rico but do not include Alaska or Texas. Hawai'i trip estimates are available only for the shore and private boat mode.

Table 15. Recreational Fishing Trips by Region, 2014 (millions of fishing trips)

| Region | Trips |
|----------------|-------|
| U.S. Total | 68.0 |
| Gulf of Mexico | 21.0 |
| South Atlantic | 17.6 |
| Mid-Atlantic | 14.3 |
| Pacific | 6.7 |
| New England | 6.4 |
| Hawai'i | 1.4 |

Table 16. Recreational Fishing Trips by State, 2014 (thousands of trips)

| State | Trips | State | Trips |
|----------------|--------|---------------|-------|
| West Florida | 15,179 | Alabama | 2,169 |
| East Florida | 9,644 | Mississippi | 1,480 |
| North Carolina | 4,954 | Hawai'i | 1,375 |
| New Jersey | 4,869 | Connecticut | 1,364 |
| California | 4,401 | Washington | 1,300 |
| New York | 3,955 | Rhode Island | 1,099 |
| Massachusetts | 3,397 | Delaware | 868 |
| Maryland | 2,473 | Georgia | 827 |
| South Carolina | 2,221 | Oregon | 731 |
| Louisiana | 2,188 | Maine | 539 |
| Virginia | 2,182 | New Hampshire | 252 |

Harvest and Release

Among the 10 key U.S. recreational species or species groups, drum (Atlantic croaker and spot, 33.8 million fish); drum (seatrouts, 24.5 million fish); and summer flounder (19.5 million fish) were the most commonly caught by anglers in 2014.¹⁹ Anglers fishing in the Mid-Atlantic and New England Regions caught most of the Atlantic croaker, summer flounder and striped bass in 2014, while most seatrout were caught in the Gulf of Mexico and South Atlantic Regions.

In the North Pacific Region, salmon and Pacific halibut were the most commonly caught species/species group in 2014 with 920,000 and 659,000 fish caught, respectively. Scads (bigeye and mackerel) were the most frequently caught fish in the Western Pacific at 898,000.

Recreational catch of striped bass decreased 56 percent between 2005 and 2014, the largest change during this 10-year time period. There was also a 47 percent decrease in drum (seatrouts) caught and a 44 percent decrease in salmon caught. The largest increase in fish caught from 2005 and 2014 was among little tunny and Atlantic bonito, which increased 135 percent.

From 2013 to 2014, decreases occurred in the recreational catch of seven key species or species groups, with the largest decrease being drum (seatrouts) (-45%). The largest increase in the number of fish caught occurred among little tunny and Atlantic bonito (51%).

Recreational Fishing Facts

Participation

- An average of 11.8 million anglers fished in the U.S. annually from 2005 to 2014.
- In 2014, coastal county residents made up 86 percent of total anglers. These anglers averaged 87 percent of total anglers annually during the 10-year period.

Fishing trips

- In the U.S., an average of 77 million fishing trips were taken annually from 2005 to 2014.
- Private or rental boat and shore-based fishing trips made up 94 percent of total trips taken in 2014. From 2005 to 2014, these fishing modes averaged 95 percent of all fishing trips.

Harvest and release

- Seatrout was the most commonly caught key species or species group from 2005 to 2014, averaging 46 million fish caught during the 10-year period. Of these, 45 percent were released rather than harvested.
- 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 between 2005 and 2014.

MARINE ECONOMY

In 2013, 7.5 million establishments operated throughout the entire U.S. economy (including marine and non-marine related establishments).²⁰ These establishments employed more than 118 million employees and had a total annual payroll of \$5.6 trillion. From 2005 to 2013, the number of establishments remained unchanged, employee numbers increased 2 percent, and total annual payroll increased 25 percent (an 8% increase in real terms) nationwide.²¹ The nation's gross domestic product was approximately \$17 trillion in 2013; employee compensation was \$8.8 trillion.

¹⁹ Harvest and release estimates include Puerto Rico but do not include Alaska. For Hawai'i, these estimates are available only for shore and private boat mode.

²⁰ Unless otherwise stated, data is from the U.S. Census Bureau, <http://censtats.census.gov/> (accessed September 15, 2014).

The Commercial Fishing Location Quotient (CFLQ) measures the proportional size of this sector in a state's economy relative to the size of the commercial fishing sector in the national economy.²² 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 U.S. CFLQ is 1. If a state CFLQ is less than 1, then less commercial fishing occurs in this state than the national average. If a state CFLQ is greater than 1, then more commercial fishing occurs in this state than the national average.

For this report, the marine economy, a subset of the national economy, consists of two industry sectors: 1) seafood sales and processing (employer establishments and non-employer firms); and 2) transport, support and marine operations (employer establishments). These sectors include several different marine-related industries. The following sections present 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

In 2013, 1,812 non-employer firms were engaged in seafood product preparation and packaging, a 68 percent increase from 2005 levels. From 2005 to 2013, annual receipts increased 64 percent (29% increase in real terms) to \$129 million. More of these firms were located in Florida (300), California (157), and New York (150) than any other state.

From 2005 to 2013, the number of employer establishments in seafood product preparation and packaging decreased 16 percent to 604. These establishments employed approximately 31,390 full- and part-time employees in 2013 and had a total annual payroll of \$1.2 billion. Compared with 2005 levels, this was a 17 percent decrease in workers and a 4 percent increase (a 20% decrease in real terms) in annual payroll. The two states with the greatest number of establishments were Alaska (115 establishments) and Washington (86 establishments). From 2005 to 2013, the number of establishments in the seafood wholesale sector decreased 9 percent to 2,098. Seafood wholesalers employed 20,367 workers and had an annual payroll of \$885 million in 2013. The number of

employees decreased 10 percent and the annual payroll increased 13 percent (a 13% decrease in real terms). Most of these establishments were concentrated in California (320 establishments), New York (264 establishments), and Florida (234 establishments).

In 2013, 2,497 non-employer firms were engaged in retail seafood sales, a 19 percent increase from 2005 levels. Annual receipts increased 1 percent (a 31% increase in real terms) from 2005 levels to \$206 million in 2013. The majority of these firms were located in Florida (338), California (218), and New York (197).

The number of employer establishments engaged in seafood retail activities decreased 7 percent from 2005 levels to 1,995 in 2013. These establishments employed 10,631 full- and part-time employees in 2013 and had a total annual payroll of \$253 million. Compared with 2005 levels, this was a 2 percent increase in workers and a 30 percent increase (remaining unchanged in real terms) in annual payroll. The employer establishments for retail seafood sales were primarily located in New York (399 establishments), Florida (165 establishments), and California (155 establishments).

Transport, Support and Marine Operations

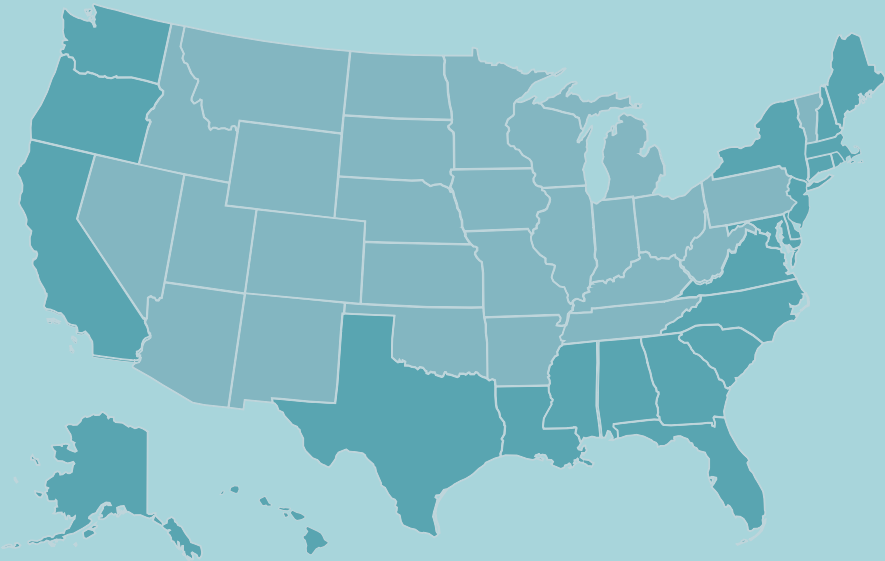
In the U.S. transport, support and marine operations industry sector, marinas had the highest number of establishments. In 2013, 3,844 marinas employed 26,373 full- and part-time workers. Compared to 2005 levels, this was a 4 percent decrease in the number of employees.

Annual payroll for this industry was \$951 million in 2013, a 13 percent increase (13% decrease in real terms) from 2005 levels. The states with the most marinas included Florida (444 establishments), New York (424), California (250), and New Jersey (206).

²¹ 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).

²² U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

Tables | National Overview



2014 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 | 1,394,833 | 153,341,370 | 41,955,584 | 64,070,881 | 811,118 | 54,370,765 | 19,707,629 | 28,030,303 |
| Commercial Harvesters | 185,263 | 14,638,252 | 4,673,920 | 7,364,613 | 185,263 | 14,638,252 | 4,673,920 | 7,364,613 |
| Seafood Processors & Dealers | 240,753 | 32,951,529 | 10,399,288 | 14,456,173 | 62,346 | 8,533,156 | 2,693,009 | 3,743,583 |
| Importers | 227,172 | 62,490,025 | 10,015,219 | 19,049,696 | - | - | - | - |
| Seafood Wholesalers & Distributors | 63,331 | 8,589,026 | 2,822,414 | 4,038,489 | 28,503 | 3,865,616 | 1,270,268 | 1,817,580 |
| Retail | 678,314 | 34,672,538 | 14,044,744 | 19,161,910 | 535,006 | 27,333,741 | 11,070,432 | 15,104,527 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Total Revenue | 3,952,730 | 4,233,361 | 4,204,653 | 4,394,114 | 3,930,119 | 4,524,216 | 5,370,262 | 5,118,940 | 5,547,320 | 5,472,880 |
| Finfish & Other | 1,860,102 | 2,107,085 | 2,067,995 | 2,255,059 | 1,877,913 | 2,166,708 | 2,578,699 | 2,399,598 | 2,636,437 | 2,408,460 |
| Shellfish | 2,092,628 | 2,126,276 | 2,136,658 | 2,139,055 | 2,052,206 | 2,357,508 | 2,791,563 | 2,719,342 | 2,910,883 | 3,064,420 |
| Key Species | | | | | | | | | | |
| American lobster | 415,415 | 404,395 | 368,528 | 325,122 | 311,184 | 404,034 | 422,623 | 430,833 | 462,842 | 567,319 |
| Blue crab | 140,818 | 126,034 | 149,163 | 160,931 | 163,291 | 205,305 | 184,287 | 187,547 | 192,744 | 210,366 |
| Menhaden | 62,520 | 70,553 | 92,725 | 90,995 | 90,254 | 92,850 | 133,005 | 123,831 | 129,467 | 104,549 |
| Pacific halibut | 177,599 | 202,131 | 227,348 | 217,726 | 140,613 | 207,282 | 213,465 | 152,403 | 117,901 | 115,487 |
| Pacific salmon | 330,816 | 310,865 | 381,589 | 395,253 | 369,744 | 554,798 | 618,332 | 489,102 | 756,685 | 616,728 |
| Sablefish | 136,240 | 132,156 | 115,610 | 124,590 | 128,713 | 124,385 | 184,175 | 140,748 | 101,685 | 110,771 |
| Sea scallop | 432,514 | 386,341 | 386,045 | 370,053 | 375,569 | 455,731 | 585,142 | 558,989 | 466,820 | 424,479 |
| Shrimp | 412,718 | 452,979 | 429,993 | 444,817 | 379,503 | 409,334 | 538,118 | 488,103 | 594,593 | 702,186 |
| Tunas | 86,358 | 86,324 | 93,875 | 106,869 | 96,069 | 107,966 | 136,425 | 163,761 | 146,257 | 135,513 |
| Walleye pollock | 306,972 | 329,879 | 297,461 | 323,212 | 270,595 | 282,399 | 362,594 | 343,311 | 406,437 | 399,883 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Total Landings | 9,712,468 | 9,552,100 | 9,313,639 | 8,360,561 | 7,900,423 | 8,044,996 | 9,903,529 | 9,435,960 | 9,812,198 | 9,409,780 |
| Finfish & Other | 1,630,914 | 8,356,894 | 8,230,496 | 7,299,821 | 6,630,200 | 6,736,387 | 8,526,246 | 8,135,363 | 8,532,378 | 8,162,523 |
| Shellfish | 1,081,554 | 1,195,206 | 1,083,143 | 1,060,740 | 1,270,223 | 1,308,609 | 1,377,282 | 1,300,596 | 1,279,820 | 1,247,257 |
| Key Species | | | | | | | | | | |
| American lobster | 87,809 | 96,119 | 81,039 | 87,749 | 100,775 | 117,573 | 126,253 | 150,177 | 150,097 | 147,991 |
| Blue crab | 159,242 | 166,122 | 157,080 | 162,384 | 176,393 | 199,540 | 202,147 | 179,770 | 135,141 | 135,581 |
| Menhaden | 1,243,807 | 1,306,632 | 1,484,230 | 1,344,468 | 1,407,366 | 1,259,464 | 1,899,357 | 1,573,101 | 1,391,008 | 1,151,355 |
| Pacific halibut | 76,264 | 71,891 | 69,967 | 67,000 | 59,812 | 56,467 | 42,864 | 33,988 | 30,040 | 23,203 |
| Pacific salmon | 899,759 | 663,567 | 886,054 | 659,196 | 705,063 | 787,712 | 780,073 | 635,777 | 1,069,359 | 720,345 |
| Sablefish | 51,093 | 47,227 | 43,875 | 43,285 | 42,828 | 40,317 | 41,279 | 41,301 | 39,371 | 35,300 |
| Sea scallop | 56,626 | 60,123 | 58,450 | 53,384 | 57,921 | 57,536 | 59,192 | 56,895 | 40,995 | 33,817 |
| Shrimp | 264,163 | 332,491 | 273,636 | 248,647 | 304,982 | 249,017 | 312,185 | 292,963 | 292,062 | 316,548 |
| Tunas | 44,252 | 49,826 | 50,642 | 47,882 | 49,062 | 48,002 | 49,839 | 59,493 | 55,750 | 58,734 |
| Walleye pollock | 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 | 3,145,609 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|------|------|------|------|------|------|------|------|-------|-------|
| American lobster | 4.73 | 4.21 | 4.55 | 3.71 | 3.09 | 3.44 | 3.35 | 2.87 | 3.08 | 3.83 |
| Blue crab | 0.88 | 0.76 | 0.95 | 0.99 | 0.93 | 1.03 | 0.91 | 1.04 | 1.43 | 1.55 |
| Menhaden | 0.05 | 0.05 | 0.06 | 0.07 | 0.06 | 0.07 | 0.07 | 0.08 | 0.09 | 0.09 |
| Pacific halibut | 2.33 | 2.81 | 3.25 | 3.25 | 2.35 | 3.67 | 4.98 | 4.48 | 3.92 | 4.98 |
| Pacific salmon | 0.37 | 0.47 | 0.43 | 0.60 | 0.52 | 0.70 | 0.79 | 0.77 | 0.71 | 0.86 |
| Sablefish | 2.67 | 2.80 | 2.63 | 2.88 | 3.01 | 3.09 | 4.46 | 3.41 | 2.58 | 3.14 |
| Sea scallop | 7.64 | 6.43 | 6.60 | 6.93 | 6.48 | 7.92 | 9.89 | 9.82 | 11.39 | 12.55 |
| Shrimp | 1.56 | 1.36 | 1.57 | 1.79 | 1.24 | 1.64 | 1.72 | 1.67 | 2.04 | 2.22 |
| Tunas | 1.95 | 1.73 | 1.85 | 2.23 | 1.96 | 2.25 | 2.74 | 2.75 | 2.62 | 2.31 |
| Walleye pollock | 0.09 | 0.10 | 0.10 | 0.14 | 0.14 | 0.15 | 0.13 | 0.12 | 0.14 | 0.13 |

2014 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|---------|------------|------------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 24,702 | 3,147,359 | 1,237,009 | 1,828,733 |
| | Private Boat | 28,551 | 4,228,536 | 1,357,624 | 2,346,779 |
| | Shore | 27,359 | 3,678,192 | 1,210,359 | 2,045,426 |
| Total Durable Expenditures | | 357,978 | 49,568,667 | 18,224,441 | 29,235,874 |
| Total Impacts | | 438,590 | 60,622,754 | 22,029,433 | 35,456,812 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)¹

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | NA | 1,275,267 | Fishing Tackle | 3,880,187 |
| Private Boat | NA | 1,970,427 | Other Equipment | 2,012,571 |
| Shore | NA | 1,624,643 | Boat Expenses | 16,271,896 |
| Total | NA | 4,870,337 | Vehicle Expenses | 3,689,127 |
| | | | Second Home Expenses | 2,115,329 |
| | | | Total Durable Expenditures | 27,969,109 |
| Total State Trip and Durable Goods Expenditures | | | | 32,839,446 |

Recreational Anglers by Residential Area (thousands of anglers)^{2,7}

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Coastal | 11,439 | 11,838 | 12,385 | 10,661 | 9,377 | 9,465 | 9,198 | 9,467 | 9,461 | 9,023 |
| Non-Coastal | 1,492 | 1,685 | 1,616 | 1,591 | 1,746 | 1,501 | 1,430 | 1,558 | 1,545 | 1,490 |
| Total Anglers | 12,931 | 13,523 | 14,001 | 12,252 | 11,123 | 10,966 | 10,628 | 11,025 | 11,006 | 10,513 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| For-Hire | 3,524 | 3,739 | 4,179 | 3,417 | 3,282 | 2,602 | 3,184 | 3,179 | 3,855 | 4,169 |
| Private | 43,250 | 42,718 | 46,465 | 44,912 | 37,650 | 37,759 | 35,318 | 34,703 | 34,137 | 32,720 |
| Shore | 37,343 | 38,693 | 37,025 | 37,219 | 33,635 | 32,104 | 31,695 | 32,977 | 33,882 | 31,113 |
| Total Trips | 84,117 | 85,150 | 87,669 | 85,548 | 74,567 | 72,465 | 70,197 | 70,859 | 71,874 | 68,002 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)⁴

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Drum (Atlantic croaker and spot) | H | 20,356 | 22,934 | 26,567 | 24,018 | 15,765 | 13,355 | 13,319 | 11,951 | 17,631 | 17,744 |
| | R | 23,758 | 19,378 | 21,369 | 24,975 | 20,371 | 15,978 | 18,092 | 18,621 | 25,490 | 16,023 |
| Drum (seatrouts) | H | 16,099 | 18,903 | 17,563 | 21,077 | 20,189 | 16,739 | 22,240 | 20,881 | 17,562 | 9,327 |
| | R | 30,629 | 30,345 | 28,976 | 32,354 | 25,807 | 23,937 | 28,649 | 31,557 | 26,983 | 15,216 |
| Little tunny & Atlantic bonito | H | 176 | 304 | 291 | 198 | 232 | 184 | 282 | 383 | 344 | 370 |
| | R | 465 | 864 | 1,220 | 722 | 807 | 597 | 700 | 853 | 651 | 1,135 |
| Pacific halibut | H | 500 | 463 | 585 | 516 | 440 | 398 | 394 | 388 | 454 | 408 |
| | R | 380 | 353 | 438 | 359 | 321 | 304 | 311 | 324 | 324 | 251 |
| Rockfishes & scorpionfishes | H | 3,216 | 2,346 | 2,132 | 1,760 | 1,837 | 2,045 | 2,794 | 3,269 | 3,728 | 3,923 |
| | R | 1,290 | 856 | 653 | 589 | 787 | 671 | 627 | 982 | 1,123 | 1,097 |
| Salmon | H | 1,436 | 835 | 1,249 | 707 | 1,488 | 711 | 979 | 910 | 1,301 | 810 |
| | R | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Sharks ⁵ | H | 227 | 172 | 193 | 156 | 148 | 167 | 118 | 111 | 252 | 121 |
| | R | 6,155 | 5,494 | 6,071 | 5,613 | 5,334 | 5,243 | 3,758 | 4,093 | 6,397 | 5,770 |
| Striped bass | H | 2,491 | 2,741 | 2,449 | 2,345 | 1,994 | 1,977 | 2,250 | 1,509 | 2,148 | 1,820 |
| | R | 18,229 | 23,418 | 16,220 | 12,697 | 8,118 | 6,357 | 6,177 | 5,384 | 8,686 | 7,398 |
| Summer flounder | H | 4,105 | 4,035 | 3,110 | 2,363 | 1,828 | 1,510 | 1,845 | 2,277 | 2,545 | 2,460 |
| | R | 21,868 | 17,511 | 17,626 | 20,547 | 22,297 | 22,227 | 19,724 | 14,255 | 13,618 | 16,997 |
| Tunas (large Atlantic species) ⁶ | H | 667 | 542 | 728 | 795 | 523 | 590 | 420 | 674 | 641 | 590 |
| | R | 110 | 137 | 96 | 89 | 55 | 53 | 68 | 52 | 28 | 59 |

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 available only for the shore and private boat modes.⁴ Harvest and release estimates include Puerto Rico, but do not include Alaska. For Hawai'i, these estimates are available only for the shore and private boat modes.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.⁷ Includes Louisiana resident participation estimated from historical Marine Recreational Information Program (MRIP) data and a state creel survey.

United States | Marine Economy

United States Economy (% of national total)

| | #Establishments (millions) | #Employees (millions) | Annual Payroll (\$ trillions) | Employee Compensation (\$ trillions) | Gross Domestic Product (\$ trillions) | Commercial Location Quotient ¹ |
|---------|-------------------------------|--------------------------|-------------------------------------|--|---|---|
| 2005 | 7.5 | 116.32 | 4.48 | 7.08 | 13.02 | 1 |
| 2013 | 7.49 | 118.27 | 5.62 | 8.83 | 16.67 | 1 |
| %Change | -0.15 | 1.68 | 25.41 | 24.72 | 27.97 | -- |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-------------------|----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Seafood product | Firms | 1,080 | 1,142 | 1,303 | 1,308 | 1,395 | 1,617 | 1,757 | 1,766 | 1,812 |
| prep. & packaging | Receipts | 78,745 | 80,066 | 88,230 | 89,670 | 95,219 | 104,990 | 110,745 | 115,167 | 128,927 |
| Seafood sales, | Firms | 2,098 | 2,089 | 2,610 | 2,522 | 2,455 | 2,513 | 2,514 | 2,657 | 2,497 |
| retail | Receipts | 203,951 | 211,186 | 231,776 | 233,002 | 207,139 | 199,810 | 212,679 | 217,702 | 205,555 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--------------------------|----------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Seafood product | Establishments | 717 | 670 | 685 | 663 | 645 | 638 | 620 | 589 | 604 |
| prep. & packaging | Employees | 37,684 | 35,894 | 33,169 | 33,323 | 30,894 | 31,789 | 31,261 | 30,988 | 31,390 |
| | Payroll | 1,180,396 | 1,205,890 | 1,196,086 | 1,161,637 | 1,091,727 | 1,116,305 | 1,200,263 | 1,196,207 | 1,228,826 |
| Seafood sales, wholesale | Establishments | 2,314 | 2,222 | 2,438 | 2,063 | 2,099 | 2,183 | 2,287 | 1,954 | 2,098 |
| | Employees | 22,666 | 22,013 | 24,232 | 20,116 | 19,290 | 19,386 | 20,622 | 20,030 | 20,367 |
| | Payroll | 781,459 | 826,720 | 924,654 | 782,178 | 758,332 | 798,794 | 848,454 | 867,179 | 884,645 |
| Seafood sales, retail | Establishments | 2,155 | 2,115 | 2,094 | 2,044 | 1,967 | 1,982 | 1,972 | 1,957 | 1,995 |
| | Employees | 10,381 | 10,545 | 10,380 | 9,732 | 9,439 | 9,857 | 10,006 | 10,293 | 10,631 |
| | Payroll | 194,602 | 200,971 | 209,404 | 205,423 | 211,264 | 219,045 | 222,508 | 237,619 | 253,490 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Coastal & Great Lakes freight transportation | Establishments | 610 | 579 | 573 | 513 | 513 | 547 | 549 | 496 | 497 |
| | Employees | 21,025 | 22,172 | 22,568 | 21,019 | 20,919 | 17,528 | 18,590 | 19,099 | 18,659 |
| | Payroll | 1,232,342 | 1,376,033 | 1,552,467 | 1,694,613 | 1,470,159 | 1,288,001 | 1,400,267 | 1,467,709 | 1,512,053 |
| Deep sea freight transportation | Establishments | 465 | 456 | 427 | 365 | 376 | 372 | 378 | 375 | 305 |
| | Employees | 11,357 | 11,473 | 11,308 | 10,231 | 11,180 | 10,288 | 10,362 | 12,375 | 8,704 |
| | Payroll | 801,863 | 825,752 | 855,683 | 852,063 | 863,363 | 867,797 | 921,990 | 1,073,529 | 703,003 |
| Deep sea passenger transportation | Establishments | 87 | 87 | 92 | 71 | 78 | 56 | 55 | 58 | 62 |
| | Employees | 11,376 | 11,387 | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | 628,793 | 667,949 | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 4,143 | 4,025 | 4,085 | 3,972 | 3,891 | 3,937 | 3,896 | 3,782 | 3,844 |
| | Employees | 27,511 | 28,339 | 28,788 | 28,686 | 26,643 | 26,657 | 26,557 | 25,764 | 26,373 |
| | Payroll | 839,848 | 894,097 | 945,355 | 954,032 | 905,488 | 927,499 | 953,497 | 913,140 | 951,123 |
| Marine cargo handling | Establishments | 549 | 540 | 552 | 532 | 541 | 507 | 545 | 343 | 458 |
| | Employees | 59,670 | 61,905 | 62,941 | 63,736 | 56,386 | 57,275 | 59,517 | 43,824 | 66,301 |
| | Payroll | 3,034,672 | 3,261,953 | 3,428,126 | 3,272,723 | 2,776,791 | 3,026,861 | 3,159,964 | 2,601,146 | 4,086,182 |
| Navigational services to shipping | Establishments | 803 | 802 | 830 | 868 | 846 | 847 | 836 | 850 | 847 |
| | Employees | 10,819 | 12,043 | 12,997 | 13,419 | 12,689 | 13,529 | 13,441 | 12,532 | 12,485 |
| | Payroll | 584,689 | 699,375 | 756,552 | 847,938 | 826,384 | 937,980 | 893,889 | 838,959 | 929,419 |
| Port & harbor operations | Establishments | 244 | 229 | 223 | 268 | 258 | 287 | 255 | 525 | 383 |
| | Employees | 7,453 | 7,002 | 6,573 | 5,608 | 5,100 | 4,844 | 4,933 | 25,396 | 7,000 |
| | Payroll | 319,338 | 323,554 | 318,608 | 282,671 | 250,358 | 290,467 | 306,882 | 1,345,857 | 420,664 |
| Ship & boat building | Establishments | 1,799 | 1,764 | 1,771 | 1,782 | 1,615 | 1,540 | 1,497 | 1,560 | 1,514 |
| | Employees | 141,620 | 142,057 | 148,864 | 157,512 | 137,759 | 127,691 | 127,522 | 136,365 | 135,287 |
| | Payroll | 5,654,818 | 5,877,830 | 6,405,570 | 7,269,306 | 6,674,187 | 6,529,523 | 6,845,322 | 7,543,402 | 7,556,373 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

North Pacific Region

- Alaska



King salmon, Ketchikan, Alaska
(photo credit: Erin Malick)

MANAGEMENT CONTEXT

The North Pacific Region includes the fisheries in the Exclusive Economic Zone (EEZ) off the state of Alaska. Federal fisheries in this region are managed by the North Pacific Fishery Management Council (NPFMC) and NOAA Fisheries under six fishery management plans (FMPs).

Of the stocks or stock complexes covered in these FMPs only the blue king crab-Pribilof Islands stock is listed as overfished. No stocks or stock complexes in this region that are subject to overfishing.

North Pacific Region FMPs

1. Bering Sea/Aleutian Islands (BSAI) groundfish
2. Gulf of Alaska (GOA) groundfish
3. BSAI king and tanner crabs
4. Alaska scallop
5. Salmon in the EEZ
6. Arctic

CATCH SHARE PROGRAMS

The North Pacific Region has six catch share programs, more than any other region. These are the: 1) Western Alaska Community Development Quota Program; 2) Alaska Halibut and Sablefish Individual Fishing Quota (IFQ) Program; 3) American Fisheries Act Pollock Cooperatives; 4) Bering Sea and Aleutian Islands Crab IFQ Program; 5) Non-Pollock Trawl Catcher/Processor Groundfish Cooperatives (Amendment 80); and 6) Central Gulf of Alaska Rockfish Program. The landings revenues for these programs totaled over \$1 billion in 2013, exceeding the total landings revenue of any other state. Following is a description of these catch share programs and their performance.

The Western Alaska Community Development Quota (CDQ) Program was originally implemented in 1992 as part of a restructuring of the Bering Sea/Aleutian Islands (BSAI) groundfish fishery. Under this Program, a percentage of the total allowable catch for groundfish, prohibited species, halibut and crab is apportioned to 65 eligible villages in Western Alaska that are organized into six CDQ groups. The purpose of the Program is to: 1) provide eligible Western Alaska villages with the opportunity to participate and invest in

fisheries in the Bering Sea and Aleutian Islands Management Area; 2) support economic development in Western Alaska; 3) alleviate poverty and provide economic and social benefits to residents; and 4) achieve a sustainable and diversified local economy.

Annual CDQ allocations provide a revenue stream for CDQ groups through various channels, including the direct catch and sale of some species and the leasing of quota to various harvesting partners. CDQ groups use the revenue from the harvest of their fisheries allocations to fund economic development activities and provide employment opportunities. In 2013, the CDQ 2012 Decennial Review was released. The State of Alaska determined that each CDQ entity has maintained or improved performance since the evaluation period (2006 through 2010).

The Alaska Halibut and Sablefish IFQ Program was implemented in 1995. The primary objectives of this IFQ Program are to: 1) eliminate gear conflicts; 2) address safety concerns; and 3) improve product quality. The performance results of the Halibut fishery show that, relative to its Baseline period (3-year period prior to implementation), the following indicators decreased: 2013 quota, landings and active vessels. However, inflation-adjusted halibut revenue and revenue per vessel increased. The Sablefish fishery shows similar results for 2013: quota, landings and active vessels decreased, while inflation-adjusted revenue per vessel increased.

The American Fisheries Act (AFA) Pollock Cooperatives were established in 1999 and 2000 with the goals of settling allocation disputes between inshore (catcher vessels) and offshore (catcher/processors) sectors and ending the race for fish. Key performance indicators of this program show that relative to its Baseline, 2013 quota, landings, inflation-adjusted revenue and revenue per vessel increased. However, the number of active vessels decreased.

The Bering Sea and Aleutian Islands (BSAI) Crab Rationalization Program was implemented in 2005 to address the race to harvest; high bycatch and discard mortality; and product quality issues. The program

also aims to balance the interests of those who depend on crab fisheries. This program includes share allocations to harvesters and processors. Processor quota was incorporated to preserve the viability of processing facilities in dependent communities and, particularly, to maintain competitive conditions in ex-vessel markets. Community interests are protected by the CDQ and Adak Community allocations, regional landings and processing requirements and several community protection measures. The key performance indicators of this program show that, relative to its Baseline, the 2013 quota, landings and the number of active vessels decreased. However, inflation-adjusted revenue and revenue per active vessel increased.

The Non-Pollock Trawl Catcher/Processor

Groundfish Cooperatives, commonly referred to as the Amendment 80 Cooperatives, were implemented in 2007 to create economic incentives that would improve retention of all fish caught. The cooperatives also seek to reduce bycatch by commercial fishing vessels using trawl gear in the non-pollock groundfish fisheries. Key performance indicators of this program show that, relative to its Baseline, the 2013 quota, landings and inflation-adjusted revenue per vessel increased. However, the number of active vessels and inflation-adjusted revenue declined.

The Central Gulf of Alaska Rockfish Program was initially established as a 2-year (2007-2008) pilot program by the U.S. Congress, and later extended to 5 years. NOAA Fisheries implemented this catch share program in 2012. The objectives of this Program are to reduce bycatch and discards, encourage conservation-minded practices, improve product quality and value, and provide stability to the processing labor force. Results show that in 2013, the quota, landings, number of active vessels, inflation-adjusted revenue and revenue per active vessel increased relative to the Baseline.

POLICY UPDATES

Salmon bycatch in the Bering Sea pollock fishery is an important management challenge in the North Pacific because on the one hand, it involves the largest fishery in the U.S. (~25% of total landings) but on the other hand, salmon, especially Chinook in Western Alaska Rivers, is arguably the most important subsistence

fishery in the U.S. Prior to 2011, fixed salmon time-area closures and dynamic “rolling hot spot” closures were used to protect salmon but the Council concluded that these measures were not reducing bycatch sufficiently. In 2011, Amendment 91 to the BSAI Fishery Management Plan established Chinook catch limits (“hard caps”), allocated at the cooperative and vessel level, as well as other vessel-level incentives to encourage bycatch reduction at lower levels of salmon encounters and abundance when the hard cap may not strongly constrain the fishery. In 2015, the Council passed additional measures to reduce Chinook and chum bycatch including penalties for vessels with high bycatch rates, salmon excluder device requirements, seasonal reallocation of pollock quota and hard cap reductions in years of low Chinook in-river abundance.

In June 2015, the NPFMC also recommended the reduction of halibut bycatch limits in the BSAI groundfish fisheries. The bycatch limits were reduced 21 percent, from 4,426 metric tons to 3,515 metric tons. The new limits were apportioned among sector and gear types and a different reduction was applied to each. The Gulf of Alaska halibut bycatch limits incorporate measures to minimize adverse economic impacts on fishing industry sectors and will be phased in during a 3-year period that started in 2014.

Also in 2015, NOAA Fisheries proposed regulations to implement a cost-recovery fee program for the Western Alaska CDQ Program for groundfish, halibut and three limited access privilege programs (i.e., AFA, Aleutian Islands Pollock and Amendment 80 fisheries). The cost-recovery fees will recover the actual costs directly related to the management, data collection and enforcement of the programs. However, the fees cannot exceed 3 percent of the annual ex-vessel value of fish harvested by a program that is subject to the cost-recovery fee. The cost-recovery programs were subsequently implemented in January 2016.

The Halibut Catch Sharing Plan (CSP) in IPHC Area 2C (Southeast Alaska) and Area 3A (Southcentral Alaska) was adopted by the NPFMC and implemented by NOAA Fisheries in January 2014. The CSP defines an annual process for allocating halibut between the charter and

commercial halibut fisheries in Areas 2C and 3A; authorizes limited annual leases of commercial IFQ for use in the charter fishery as guided angler fish (GAF); replaced the guideline harvest-level method for setting catch limits for the charter halibut fisheries in Areas 2C and 3A; and establishes sector allocations that vary in proportion with changing levels of annual halibut abundance.

COMMERCIAL FISHERIES

Alaska fishermen earned more than \$1.7 billion from their commercial harvest (5.7 billion pounds) in 2014. Landings revenue was dominated by salmon (\$546 million), walleye pollock (\$400 million) and crab (\$238 million), which together accounted for 69 percent of revenue. Walleye pollock contributed the most to landings in 2014, accounting for 55 percent of total landings volume (3.1 billion pounds).

The North Pacific groundfish fishery is different from most other U.S. fisheries in that a large portion of the fishery is processed at sea and, therefore, no landings revenues are reported. The landings revenue for the species landed and processed at sea is estimated by using prices obtained from the shore-side sector. These species include Atka mackerel, flatfish, Pacific cod, rockfish, sablefish and walleye pollock. When data from the shore-side sector are inadequate, historical information about the relationship between the ex-vessel price and the wholesale price of finished products is used to estimate ex-vessel prices and revenue for portions of the fishery mostly processed at sea.

Key North Pacific Commercial Species

- Atka mackerel
- Crab
- Flatfish
- Pacific cod
- Pacific halibut
- Pacific herring
- Rockfish
- Sablefish
- Salmon
- Walleye pollock

Economic Impacts

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 2014, Alaska's commercial fishing and seafood industry¹ generated \$4.2 billion in sales impacts, \$1.9 billion in income impacts, \$2.3

billion in value-added impacts and 61,000 full- and part-time jobs. The commercial harvesters sector contributed the most to these impacts with \$2.9 billion in sales, \$1.3 billion in income, \$1.6 billion in value-added impacts and 44,000 jobs.

Landings Revenue

In 2014, landings revenue for finfish and shellfish totaled more than \$1.7 billion, a 33 percent increase from 2005 (13% in real terms after adjusting for inflation) and an 11 percent decrease from 2013. Finfish and other catch accounted for 85 percent of the 2014 landings revenue. Landings revenue was dominated by salmon (\$546 million), walleye pollock (\$400 million) and crab (\$238 million).

The largest increases in landings revenue between 2005 and 2014 were for rockfish (115% increase, 83% in real terms); salmon (86% increase, 58% in real terms); flatfish (64% increase, 39% in real terms); and crab (63% increase, 38% in real terms). Pacific halibut (-37%, -47 in real terms) and Pacific herring (-14%, -27% in real terms) were the only species with decreased landings revenues during this period.

Atka mackerel landings revenues increased 35 percent from 2013 to 2014 largely due to the increase in the Bering Sea total allowable catch (TAC) over 2013 levels. Atka mackerel was the only species with a significant (greater than 5%) year-over-year increase in landings revenue in 2014. Species with declining revenues from 2013 to 2014 included Pacific herring (-29%), salmon (-20%) and Pacific cod (-19%). In absolute terms, salmon had the largest one-year decline (-\$134 million) in landings revenue from 2013 to 2014, which is largely attributable to the biennial cycle of pink salmon, which tends to have weaker runs in even-numbered years. The 2013 pink salmon, in particular, was quite strong, – with the highest landings ever recorded for Alaska.

Landings

In 2014, North Pacific commercial fishermen landed 5.7 billion pounds of finfish and shellfish, virtually unchanged from 2013 levels. In terms of key species or species groups, walleye pollock contributed the most to landings, accounting for 55 percent of total landings (3.1 billion

¹ 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)

pounds). Pacific cod (717 million pounds), salmon (683 million pounds) and flatfish (662 million pounds) ranked next in terms of landings. Compared with 2005, landings of rockfish (104%), flatfish (94%) and crab (49%) increased the most. The largest decreases between 2005 and 2014 were experienced by Pacific halibut (-71%) and Atka mackerel (-46%).

Commercial Fisheries Facts

Landings revenue

- On average, the key species or species groups accounted for 99 percent of total revenue in the North Pacific Region from 2005 to 2014 (\$1.6 billion).
- Salmon contributed more than any other species or species group, averaging \$437 million in landings revenue from 2005 to 2014.

Landings

- On average, the key species or species groups accounted for 99 percent of total revenue in the North Pacific Region from 2005 to 2014 (\$5.1 billion pounds).
- Walleye pollock contributed the most to landings in the region, averaging 2.8 billion pounds from 2005 to 2014.

Prices

- Pacific halibut had the highest average annual ex-vessel price per pound (\$3.58) during the period, followed by sablefish (\$3.28) and crab (\$2.43).
- Walleye pollock had the lowest average annual ex-vessel price per pound (\$0.14) during the period, followed by flatfish (\$0.16) and Pacific herring (\$0.20).

Prices

Overall, ex-vessel price per pound increased for eight of the 10 key species and species groups from 2005 to 2014. Prices for Atka mackerel (167%, 129% in real terms); salmon (135%, 100% in real terms); and Pacific halibut (114%, 82% in real terms) more than doubled during this time period. From 2013 to 2014, the largest price increases were for Pacific halibut (27%), sablefish (24%) and salmon (19%). The largest price declines occurred among Pacific herring (-37%), Pacific cod (-23%) and walleye pollock (-15%), all of which had slightly higher landings (up 5 to 14%) in 2014 suggesting supply-side effects may have contributed to the price decline.

RECREATIONAL FISHERIES

Recreational fishermen spent approximately 960,000 days fishing in Alaska in 2014. These anglers numbered more than 287,000, with 59 percent of them non-residents. Pacific halibut was the most caught species or species group, with approximately 659,000 harvested or released in 2014. Rockfish species and coho salmon were also caught in large numbers, with 483,000 and 450,000 caught, respectively. Together, these three species accounted for 72 percent of total catch by anglers in the North Pacific Region.

Key North Pacific Recreational Species

- | | |
|------------------------|------------------|
| • Chinook salmon | • Pink salmon |
| • Chum salmon | • Razor clams |
| • Coho salmon | • Rockfish |
| • Greenlings (lingcod) | • Sockeye salmon |
| • Pacific halibut | |

Economic Impacts and Expenditures

The contribution of recreational fishing activities² in the North Pacific Region are reported in terms of economic impacts (employment, sales, income and value-added impacts) and expenditures on fishing trips in the state of Alaska. Employment impacts generated by recreational fishing activities in the state totaled 5,167 full- and part-time jobs in 2014. Sales impacts from recreational fishing trips totaled \$589 million; income impacts totaled \$240.3 million; and value-added impacts totaled \$357.3 million.

Expenditures for fishing trips and durable equipment across Alaska in 2014 totaled \$413.3 million. Approximately \$298.6 million of these expenditures were related to trip expenses, with a large portion coming from trips in the for-hire (51%) and private boat (45%) sectors. Durable goods expenditures were \$115 million in 2014. The largest expenditures were for boat purchases (\$53.7 million).

Participation

In 2014, there were 287,000 recreational saltwater anglers who fished in Alaska. This was a 14 percent decrease from 2005 (334,000 anglers) and a 4 percent decrease from 2013 (298,000 anglers). Recreational fishermen in Alaska are categorized as either a resident of a

² Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/marine-angler-durable-expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

coastal or a non-coastal county, or out-of-state. In 2014, residents of coastal/non-coastal counties made up 59 percent of total anglers. There was a 19 percent decrease in the number of coastal/non-coastal county anglers from 2005 and a 4 percent decrease from 2013. In terms of out-of-state anglers, 118,000 anglers fished in the North Pacific Region in 2014, representing a 7 percent decrease from 2005 and a 3 percent decrease from 2013.

Recreational Fishing Facts

Participation

- An average of 300,600 anglers fished in the North Pacific annually between 2005 and 2014.
- Alaska residents accounted for 41 percent of total anglers on average during the 10-year period.

Days Fished

- An annual average of 927,000 days fished were by anglers in Alaska between 2005 and 2014.

Harvest and Release

- Pacific halibut was the most commonly caught key species or species group with an annual average of 396,000 fish caught from 2005 to 2014.

Days Fished

Anglers who fished in Alaska spent approximately 960,000 days fishing in 2014.³ This was a 9 percent decrease from the 1.1 million days spent fishing in 2005. From 2013 to 2014, there was a 2 percent decrease in the number of days fished.

Harvest and Release

Of Alaska's key species and species groups, Pacific halibut (659,000 fish), rockfish species (483,000 fish) and coho salmon (450,000 fish) were most frequently caught by recreational fishermen.

Between 2005 and 2014, two of the North Pacific's key species or groups experienced increases in catch totals. Those with the largest increases include rockfish species (26%) and sockeye salmon (24%). During the same period, large decreases were experienced by razor clams (-79%) and pink salmon (-62%)

Rockfish species had the largest year-over-year in-

crease in the number of fish caught from 2013 to 2014 (28%). The largest year-over-year decreases during the same period were experienced by the following species groups: razor clams (-68%), chum salmon (-52%) and pink salmon (-41%).

MARINE ECONOMY

Across the entire economy of Alaska,⁴ approximately 267,000 full- and part-time employees were employed by about 21,000 establishments in 2013. Annual payroll totaled almost \$15 billion, employee compensation totaled about \$27 billion and gross state product totaled \$57 billion.⁵

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.⁶ 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 national CFLQ is 1. If a state is less than 1, then less commercial fishing occurs in this state than the national average. If a state is greater than 1, then more commercial fishing occurs in this state than the national average. The Bureau of Labor Statistics did not disclose Commercial Fishing Location Quotient (CFLQ) data for Alaska for 2013.

For this report, the marine economy, a subset of the regional economy, consists of two industry sectors: 1) seafood sales and processing (employer establishments and non-employer firms) and 2) transport, support and marine operations (employer establishments). These sectors consist 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

The number of non-employer firms (businesses that have no paid employees and are subject to federal income tax) engaged in seafood product preparation and packaging increased 106 percent to 35 firms in 2013, relative to 2005. Annual receipts increased 149 percent to about

³ In Alaska, recreational fishing data is collected in terms of the number of days spent fishing rather than the number of fishing trips taken.

⁴ Unless otherwise stated, data is from the U.S. Census Bureau, <http://censtats.census.gov/> (accessed September 15, 2014).

⁵ 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).

⁶ U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

\$3.3 million in 2013 (a 91% increase in real terms).

Employer establishments engaged in seafood product preparation and packaging decreased 7 percent from 2005 to 2013, to 115. The number of employees increased 30 percent to 8,638. Annual payroll increased 31 percent to about \$309 million in 2013 (a 1% increase in real terms).

Employer establishments in the wholesale seafood sales sector decreased 51 percent from 2005 to 2013, to 43. The number of employees decreased 42 percent to 102 in 2013. Annual payroll decreased 9 percent to \$7.2 million (a 30% decrease in real terms).

From 2005 to 2013, the number of non-employer firms in the seafood retail sales sector remained unchanged at 11 firms. Annual receipts increased 94 percent to about \$1.5 million in 2013 (a 49% increase in real terms).

Employer establishments in the seafood retail sales sector increased 27 percent from 2005 to 2013, to 14. The number of employees decreased 100 percent to 0 in 2013. Annual payroll increased 99 percent to \$2.3 million (a 53% increase in real terms).

Transport, Support and Marine Operations

Data for the transport, support and marine operations sector of Alaska's economy were largely suppressed for confidentiality reasons. However, Coastal Freight Transportation and Navigational Services to Shipping play an important role in Alaska's economy, with over \$83 million and \$11 million in 2013 payroll, respectively.

Tables | Alaska



Alaska | Commercial Fisheries

2014 Economic Impacts of the Alaska Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|-----------|-------------|-----------------|-----------|-----------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 60,749 | 4,213,515 | 1,872,175 | 2,317,288 | 60,373 | 4,177,861 | 1,858,770 | 2,299,851 |
| Commercial Harvesters | 43,594 | 2,930,055 | 1,317,246 | 1,624,777 | 43,594 | 2,930,055 | 1,317,246 | 1,624,777 |
| Seafood Processors & Dealers | 13,557 | 1,088,829 | 475,163 | 589,106 | 13,221 | 1,061,843 | 463,361 | 574,496 |
| Importers | 28 | 7,749 | 1,242 | 2,362 | - | - | - | - |
| Seafood Wholesalers & Distributors | 398 | 41,572 | 14,234 | 18,587 | 393 | 41,033 | 14,050 | 18,346 |
| Retail | 3,172 | 145,310 | 64,290 | 82,456 | 3,165 | 144,929 | 64,113 | 82,232 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Total Revenue | 1,290,505 | 1,314,859 | 1,485,703 | 1,759,899 | 1,259,452 | 1,593,216 | 1,930,553 | 1,839,406 | 1,926,900 | 1,712,476 |
| Finfish & Other | 1,131,016 | 1,190,463 | 1,304,791 | 1,508,181 | 1,063,873 | 1,386,583 | 1,663,710 | 1,546,388 | 1,680,243 | 1,459,192 |
| Shellfish | 159,489 | 124,396 | 180,912 | 251,718 | 195,579 | 206,633 | 266,843 | 293,018 | 246,657 | 253,284 |
| Key Species | | | | | | | | | | |
| Atka mackerel | 16,112 | 14,816 | 17,506 | 21,688 | 29,734 | 30,535 | 30,031 | 30,636 | 16,647 | 22,494 |
| Crab | 146,131 | 110,572 | 168,195 | 240,747 | 180,264 | 189,553 | 248,693 | 275,745 | 230,139 | 237,813 |
| Flatfish | 61,315 | 68,200 | 74,507 | 96,326 | 69,233 | 79,509 | 109,684 | 123,383 | 103,464 | 100,482 |
| Pacific cod | 103,397 | 144,678 | 181,325 | 242,152 | 98,507 | 145,905 | 163,426 | 171,206 | 189,991 | 153,275 |
| Pacific halibut | 170,075 | 192,905 | 217,399 | 208,983 | 134,603 | 200,454 | 205,211 | 144,801 | 111,483 | 106,674 |
| Pacific herring | 13,429 | 7,455 | 14,817 | 22,912 | 29,294 | 23,026 | 12,305 | 19,430 | 16,280 | 11,492 |
| Rockfish | 13,174 | 18,003 | 17,422 | 16,756 | 14,446 | 21,588 | 33,628 | 33,241 | 27,172 | 28,313 |
| Sablefish | 76,781 | 85,023 | 88,500 | 92,207 | 87,236 | 97,671 | 139,708 | 120,163 | 82,333 | 86,499 |
| Salmon | 293,562 | 276,512 | 347,625 | 368,219 | 344,655 | 505,695 | 564,788 | 441,284 | 679,528 | 546,022 |
| Walleye pollock | 381,502 | 380,510 | 344,170 | 436,074 | 254,295 | 280,022 | 401,915 | 453,171 | 446,550 | 399,883 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Total Landings | 5,651,307 | 5,421,264 | 5,312,288 | 533,624 | 4,064,033 | 4,347,449 | 5,353,133 | 5,344,168 | 5,791,755 | 5,671,337 |
| Finfish & Other | 5,583,798 | 5,342,240 | 5,233,919 | 4,426,678 | 3,968,061 | 4,261,588 | 5,267,305 | 5,226,303 | 5,699,044 | 5,579,094 |
| Shellfish | 67,510 | 79,023 | 78,369 | 106,946 | 95,972 | 85,861 | 85,828 | 117,865 | 92,712 | 92,243 |
| Key Species | | | | | | | | | | |
| Atka mackerel | 129,482 | 130,814 | 126,961 | 127,029 | 156,887 | 145,206 | 112,596 | 103,987 | 51,424 | 69,503 |
| Crab | 57,310 | 69,002 | 70,699 | 99,445 | 89,531 | 79,875 | 80,463 | 111,914 | 87,089 | 85,106 |
| Flatfish | 341,204 | 383,111 | 421,824 | 599,342 | 506,339 | 564,084 | 649,625 | 647,342 | 659,706 | 661,829 |
| Pacific cod | 546,748 | 517,799 | 487,347 | 493,814 | 490,541 | 538,775 | 662,977 | 716,726 | 681,318 | 716,594 |
| Pacific halibut | 73,922 | 69,154 | 67,242 | 64,639 | 57,749 | 54,857 | 41,291 | 32,422 | 28,696 | 21,616 |
| Pacific herring | 85,701 | 79,845 | 67,137 | 83,787 | 86,951 | 108,116 | 98,600 | 75,058 | 85,076 | 96,789 |
| Rockfish | 65,513 | 74,316 | 86,220 | 89,453 | 83,540 | 100,043 | 106,024 | 114,463 | 123,031 | 133,322 |
| Sablefish | 37,352 | 33,509 | 32,245 | 30,307 | 27,005 | 25,262 | 27,140 | 29,720 | 30,215 | 25,679 |
| Salmon | 872,318 | 634,227 | 861,253 | 640,070 | 671,181 | 756,825 | 738,122 | 611,163 | 1,012,612 | 683,318 |
| Walleye pollock | 3,410,065 | 3,400,810 | 3,066,600 | 2,276,144 | 1,866,171 | 1,947,578 | 2,810,787 | 2,872,186 | 3,003,134 | 3,145,605 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|------|------|------|------|------|------|------|------|------|------|
| Atka mackerel | 0.12 | 0.11 | 0.14 | 0.17 | 0.19 | 0.21 | 0.27 | 0.29 | 0.32 | 0.32 |
| Crab | 2.55 | 1.60 | 2.38 | 2.42 | 2.01 | 2.37 | 3.09 | 2.46 | 2.64 | 2.79 |
| Flatfish | 0.18 | 0.18 | 0.18 | 0.16 | 0.14 | 0.14 | 0.17 | 0.19 | 0.16 | 0.15 |
| Pacific cod | 0.19 | 0.28 | 0.37 | 0.49 | 0.20 | 0.27 | 0.25 | 0.24 | 0.28 | 0.21 |
| Pacific halibut | 2.30 | 2.79 | 3.23 | 3.23 | 2.33 | 3.65 | 4.97 | 4.47 | 3.89 | 4.93 |
| Pacific herring | 0.16 | 0.09 | 0.22 | 0.27 | 0.34 | 0.21 | 0.12 | 0.26 | 0.19 | 0.12 |
| Rockfish | 0.20 | 0.24 | 0.20 | 0.19 | 0.17 | 0.22 | 0.32 | 0.29 | 0.22 | 0.21 |
| Sablefish | 2.06 | 2.54 | 2.74 | 3.04 | 3.23 | 3.87 | 5.15 | 4.04 | 2.72 | 3.37 |
| Salmon | 0.34 | 0.44 | 0.40 | 0.58 | 0.51 | 0.67 | 0.77 | 0.72 | 0.67 | 0.80 |
| Walleye pollock | 0.11 | 0.11 | 0.11 | 0.19 | 0.14 | 0.14 | 0.14 | 0.16 | 0.15 | 0.13 |

2014 Economic Impacts of Alaska Recreational Fishing Expenditures (thousands of dollars)¹

| | | #Jobs | Sales | Income | Value-Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 1,906 | 233,056 | 109,854 | 139,312 |
| | Private Boat | 2,056 | 245,475 | 81,427 | 140,006 |
| | Shore | 119 | 14,458 | 4,770 | 8,069 |
| Total Durable Expenditures | | 1,086 | 95,981 | 44,243 | 69,956 |
| Total State Economic Impacts | | 5,167 | 588,970 | 240,294 | 357,343 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|---------------|-------------------|--|----------------------------|----------------------------|
| | Non-Residents | Residents | | Fishing Tackle | 24,756 |
| For-Hire | 129,735 | 23,692 | | Other Equipment | 31,943 |
| Private Boat | 80,979 | 51,854 | | Boat Expenses | 53,691 |
| Shore | 6,486 | 5,871 | | Vehicle Expenses | 4,300 |
| Total | 217,200 | 81,417 | | Second Home Expenses | 0 |
| | | | | Total Durable Expenditures | 114,690 |
| Total State Trip and Durable Goods Expenditures | | | | | 413,307 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------|------|------|------|------|------|------|------|------|------|------|
| Out-of-State | 127 | 120 | 127 | 119 | 127 | 122 | 124 | 118 | 121 | 118 |
| Coastal/Non-Coastal | 207 | 197 | 205 | 190 | 158 | 159 | 161 | 160 | 176 | 169 |
| Total Anglers | 334 | 317 | 332 | 309 | 284 | 281 | 286 | 278 | 298 | 287 |

Recreational Fishing Effort by Mode (thousands of angler fishing days)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|-------|------|-------|------|------|------|------|------|------|------|
| Total Days Fished | 1,054 | 941 | 1,052 | 935 | 914 | 811 | 811 | 808 | 980 | 960 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)^{2,3,4}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------|---|------|------|------|------|------|------|------|------|------|------|
| Chinook | H | 116 | 117 | 110 | 71 | 89 | 78 | 85 | 63 | 81 | 111 |
| Salmon | R | 127 | 104 | 110 | 80 | 96 | 66 | 95 | 62 | 120 | 94 |
| Chum | H | 17 | 14 | 18 | 12 | 22 | 11 | 21 | 11 | 25 | 12 |
| Salmon | R | 42 | 34 | 34 | 28 | 34 | 19 | 38 | 20 | 39 | 19 |
| Coho | H | 695 | 395 | 506 | 403 | 418 | 350 | 386 | 263 | 493 | 390 |
| Salmon | R | 191 | 107 | 122 | 89 | 94 | 74 | 88 | 50 | 122 | 60 |
| Lingcod | H | 38 | 35 | 42 | 37 | 32 | 32 | 33 | 33 | 34 | 32 |
| | R | 67 | 53 | 70 | 65 | 46 | 39 | 36 | 36 | 33 | 29 |
| Pacific | H | 500 | 463 | 585 | 516 | 440 | 398 | 394 | 388 | 454 | 408 |
| Halibut | R | 380 | 353 | 438 | 359 | 321 | 304 | 311 | 324 | 324 | 251 |
| Pink | H | 149 | 65 | 133 | 88 | 117 | 82 | 72 | 78 | 113 | 69 |
| Salmon | R | 343 | 167 | 280 | 151 | 224 | 121 | 135 | 141 | 203 | 118 |
| Razor | H | 451 | 483 | 389 | 593 | 556 | 357 | 436 | NA | 291 | 90 |
| Clams | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | NA | 3 | 3 |
| Rockfish | H | 184 | 173 | 198 | 226 | 209 | 224 | 211 | 230 | 256 | 335 |
| Species | R | 199 | 165 | 178 | 171 | 149 | 151 | 122 | 121 | 121 | 148 |
| Sockeye | H | 27 | 21 | 32 | 29 | 34 | 28 | 31 | 28 | 40 | 35 |
| Salmon | R | 11 | 7 | 21 | 10 | 10 | 6 | 10 | 8 | 13 | 12 |

¹ Data reported in this table includes saltwater fishing activities only.² Information reported in this table is from the Sport Fish Division of the Alaska Department of Fish and Game (ADF&G) and includes saltwater fishing activities only.³ In this table, '0' = 0-999 fish.⁴ NA = data not available

Alaska's State Economy (% of national total)^{1,2}

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ³ |
|---------|-----------------|----------------|------------------------------|-------------------------------------|-----------------------------------|---|
| 2005 | 19,808 (0.3%) | 231,088 (0.2%) | 9.77 (0.2%) | 18.60 (0.3%) | 40.28 (0.3%) | 5.87 |
| 2013 | 20,519 (0.3%) | 266,627 (0.2%) | 14.60 (0.3%) | 26.59 (0.3%) | 57.28 (0.3%) | ds |
| %Change | 3.5 | 13.3 | 33.1 | 30.0 | 29.7 | NA |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 17 | 22 | 33 | 31 | 32 | 28 | 26 | 25 | 35 |
| | Receipts | 1,315 | 1,055 | 1,837 | 1,455 | 1,693 | 2,482 | 2,882 | 2,708 | 3,268 |
| Seafood sales, retail | Firms | 11 | 12 | 12 | 13 | 16 | 23 | 15 | 15 | 11 |
| | Receipts | 752 | 649 | 1,358 | 1,431 | 1,350 | 1,595 | 903 | 1,626 | 1,458 |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Seafood product prep. & packaging | Establishments | 124 | 113 | 114 | 122 | 121 | 119 | 122 | 116 | 115 |
| | Employees | 6,621 | 6,866 | 6,506 | 7,707 | 7,572 | 8,074 | 8,578 | 8,289 | 8,638 |
| | Payroll | 235,457 | 246,067 | 262,127 | 254,894 | 255,403 | 268,208 | 296,851 | 297,284 | 308,961 |
| Seafood sales, wholesale | Establishments | 88 | 77 | 68 | 57 | 54 | 52 | 48 | 47 | 43 |
| | Employees | 177 | 224 | 167 | 143 | 0 | 0 | 159 | 143 | 102 |
| | Payroll | 7,928 | 8,509 | 8,528 | 8,389 | 8,445 | 9,141 | 9,985 | 10,943 | 7,205 |
| Seafood sales, retail | Establishments | 11 | 7 | 7 | 9 | 10 | 10 | 10 | 15 | 14 |
| | Employees | 22 | 0 | 0 | 37 | 44 | 0 | 0 | 0 | 0 |
| | Payroll | 1,175 | 0 | 0 | 1,839 | 1,824 | 1,986 | 2,487 | 2,019 | 2,337 |

Transport, Support, & Marine Operations - Employer Establishments (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 43 | 46 | 46 | 49 | 50 | 55 | 63 | 47 | 53 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | 27,357 | 33,888 | 33,132 | ds | ds | ds | 82,692 |
| Deep sea freight transportation | Establishments | 5 | 5 | 3 | 3 | 3 | 3 | 1 | 2 | 3 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 1 | 1 | 6 | 1 | 1 | 0 | 1 | 1 | 2 |
| | Employees | ds | ds | ds | ds | ds | NA | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | NA | ds | ds | ds |
| Marinas | Establishments | 22 | 21 | 13 | 14 | 13 | 14 | 14 | 13 | 12 |
| | Employees | 71 | ds | 48 | 66 | 56 | ds | ds | ds | ds |
| | Payroll | 2,612 | ds | 1,763 | 2,303 | 2,181 | 1,932 | 2,053 | 1,613 | 1,449 |
| Marine cargo handling | Establishments | 13 | 11 | 17 | 12 | 13 | 13 | 14 | 8 | 9 |
| | Employees | 703 | 503 | 677 | ds | ds | ds | ds | 334 | ds |
| | Payroll | 20,827 | 22,876 | 35,345 | ds | ds | ds | ds | 26,481 | ds |
| Navigational services to shipping | Establishments | 32 | 31 | 31 | 25 | 23 | 25 | 22 | 21 | 22 |
| | Employees | 318 | ds | ds | 296 | 312 | 303 | 321 | 97 | 103 |
| | Payroll | 20,334 | ds | 25,058 | 23,233 | 25,630 | 27,543 | 27,156 | 9,938 | 10,805 |
| Port & harbor operations | Establishments | 2 | 2 | 2 | 7 | 8 | 9 | 8 | 18 | 13 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | 582 | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | 1,790 | 25,545 | ds |
| Ship & boat building | Establishments | 14 | 17 | 16 | 17 | 21 | 22 | 23 | 23 | 20 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |

¹ ds = these data are suppressed.² NA = not applicable.³ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

Pacific Region

- California
- Oregon
- Washington



Catcher-processor vessel, Washington
(photo credit: Leif Anderson)

MANAGEMENT CONTEXT

The Pacific Region includes California, Oregon and Washington. Federal fisheries in this region are managed by the Pacific Fishery Management Council (PFMC) and NOAA Fisheries under four fishery management plans (FMPs).

Pacific Region FMPs

1. Coastal pelagic species
2. Pacific coast salmon
1. Pacific coast groundfish
2. West Coast highly migratory species

Four of the stocks or stock complexes covered in these FMPs were listed as overfished in 2014: canary rockfish, Pacific ocean perch, yelloweye rockfish and Pacific bluefin tuna. Two stock complexes were subject to overfishing in 2014: bigeye tuna and Pacific bluefin tuna.

Interesting management techniques are employed in the Pacific Region's fisheries. For example, the Pacific groundfish and salmon fisheries are subject to "weak stock management," where access to the harvestable surplus of healthier stocks is of 10 restricted to protect weaker stocks with which they co-mingle in the ocean. These weaker stocks include seven rebuilding groundfish stocks, salmon (listed under the Endangered Species Act), and other non-listed stocks that constrain the fishery.

Salmon management is further complicated by the need to ensure equitable allocation of harvest among diverse user groups and coordination with other entities that have jurisdiction over other aspects of salmon management. Decades of habitat modification, hatchery practices, harvest, and growing competition for water have affected the viability of salmon stocks and made them more vulnerable to adverse environmental conditions. These conditions include the prolonged drought and adverse ocean conditions experienced in recent years. Low returns of salmon to the Klamath River in 2006, and to the Sacramento River in 2008 and 2009, resulted in unprecedented closures of ocean and in-river fisheries, leading to federal disaster relief for affected entities.

Coastal pelagic species (CPS) are highly variable, environmentally sensitive stocks that provide forage for

marine mammals, birds and fish. These species include Pacific sardine, northern anchovy, Pacific and jack mackerel, and market squid. Of these, Pacific sardine is the most commonly targeted CPS finfish and is managed via an innovative harvest control rule: allowable harvest varies with sea surface temperature. Because the geographic range of sardine tends to expand with abundance, harvest allocation between the California and Pacific Northwest fisheries is an ongoing and dynamic issue. The annual sardine harvest guideline is allocated coast-wide on a seasonal basis. Recent decreases in harvest guideline limits have contributed to the development of an intense derby fishery.

Catch limits for Pacific halibut, a transboundary fish stock, are set in January by the International Pacific Halibut Commission (IPHC). This bilateral commission between the U.S. and Canada determines total allowable catch levels (TACs) for Pacific halibut that will be caught in the U.S. and Canadian exclusive economic zones (EEZs). After catch levels are determined, the PFMC develops a catch-sharing plan for tribal and non-tribal (commercial and recreational) fisheries conducted in the federal waters of California, Oregon and Washington.

The Highly Migratory Species (HMS) FMP includes tunas, billfish and pelagic sharks as managed species. The albacore surface hook-and-line fishery is by far the most economically important commercial HMS fishery, followed by the drift gillnet fishery for swordfish and thresher shark. HMS is also a very important component of the catch for the Pacific Region's recreational commercial passenger fishing vessel fleet and the private recreational boat fleet.

CATCH SHARE PROGRAMS

Market-based management tools are used by fishery managers to reduce over-capitalization, increase the economic viability of fisheries, and promote individual accountability for harvest and harvesting practices. Limited access privilege programs (LAPPs) and other catch share programs make up a category of such tools. Eco-labels are another market-based management tool that encourages fishermen to adopt harvest practices that are considered sustainable by an organization, such as the Marine Stewardship Council (MSC). The Pacific hake

midwater trawl, Oregon pink shrimp, Oregon Dungeness crab, American Albacore Fishing Association albacore tuna, North Pacific halibut, and West Coast limited entry trawl groundfish fisheries have all received certifications from the MSC.

The Pacific Region has two catch share programs: 1) the Pacific Sablefish Permit Stacking Program; and 2) the Pacific Groundfish Trawl Rationalization Program. The landings revenues for these programs totaled more than \$257 million in 2013. Following is a description of these catch share programs and their performance.

Pacific Sablefish Permit Stacking Program: This catch share program was implemented in 2001 and allows vessels to stack multiple vessel permits on a single vessel. The goal of this approach is to improve economic efficiency through rationalization of the fixed gear fleet, increase benefit for fishing communities, promote equity, mitigate reallocation effects of previous harvest regulations, promote safety, and improve product quality and value. Results for this program show that in 2013, the number of active vessels, landings, and inflation-adjusted revenue decreased compared with the Baseline period (average of the 3-year period prior to start date). However, inflation-adjusted revenue per vessel increased during this period.

Pacific Trawl Rationalization Program: This catch share program was implemented by the PFMF in January 2011. This Program involves individual fishing quotas (IFQs) for non-whiting groundfish and whiting trawlers, and cooperatives for whiting mothership and catcher processor sectors. The objectives of this program are to provide a mechanism for total catch accounting; provide a viable, profitable and efficient groundfish fishery; promote practices that reduce by-catch and discard mortality, and minimize ecological impacts; increase operational flexibility; minimize adverse effects from the IFQ program on fishing communities and other fisheries; promote measurable economic and employment benefits through the seafood catching, processing, distribution elements and support sectors of the industry; provide quality product for the consumer; and increase safety in the fishery.

The economic performance of the Program has been strong - net revenue per active catcher vessel increased 65 percent relative to the pre-catch share period (2009-2010) for the non-whiting groundfish fishery, and 400 percent for the whiting fishery. Meanwhile, motherships experienced a 62 percent increase and catcher-processors experienced a 7 percent decrease in net revenue. Expanded observer coverage and dockside monitoring, which were implemented coincident to the catch share program, coupled with long-term adherence to catch targets and improved stock assessment models have also contributed, to varying degrees, to improved fishery performance. For example, in the first three years of catch shares, the total catch of rebuilding stocks (of which three-- canary rockfish, widow rockfish and petrale sole-- are now declared rebuilt) was 50 percent lower than the previous three years.

POLICY UPDATES

In April 2015, after reviewing the best available science and hearing from fishery participants and environmental groups, the PFMF closed the Pacific sardine fishery for the 2015-2016 season. The fishery was scheduled to start on July 1, 2015, but the biomass was estimated to be 97,000 metric tons after reaching a peak of approximately one million metric tons in 2006. Although commercial fishing is closed, the PFMF allowed up to 7,000 tons of sardine to account for small amounts taken as incidental catch in other fisheries, live bait harvest, tribal harvest and research. However, if the allocated amount of incidental harvest is reached, those other fisheries will also be shut down.

In June 2015, the PFMF announced that two important West Coast groundfish stocks—canary rockfish and petrale sole—were rebuilt. These stocks had been subject to strict rebuilding plans that severely constrained West Coast fisheries for more than a decade. The canary rockfish was declared overfished in 2000, and a rebuilding plan was put in place in 2001. Under the rebuilding plan, catch quotas were dramatically reduced and large area closures put in place, and the stock was expected to rebuild by 2057. However, the new 2015 canary rockfish assessment showed that the coast-wide canary stock is already rebuilt. Petrale sole was declared overfished in 2010, and a rebuilding plan was put in place in 2011 to rebuild the stock by 2016. The petrale sole harvest

limit was cut by half; fisheries in which petrale sole could be caught were reduced. Area closures were also implemented. The 2015 stock assessment showed that the rebuilding plan was successful, and the stock had increased over the target level.

COMMERCIAL FISHERIES

In 2014, commercial fishermen in the Pacific Region landed 1.2 billion pounds of finfish and shellfish, earning \$754 million in landings revenue. Crab (\$199 million) and other shellfish (\$166 million) dominated landings revenue (48%), but made up only 7 percent of Pacific Region landings. These species groups commanded ex-vessel prices of \$3.82 and \$5.83 per pound, respectively. Washington had the highest landings revenue in the region (\$326 million) in 2014, followed by California (\$235 million) and Oregon (\$158 million). California had the highest landings (358 million pounds), followed by Oregon (292 million pounds) and Washington (191 million pounds).

Key Pacific Region Commercial Species

- Albacore tuna
- Crab
- Flatfish
- Hake
- Other shellfish
- Rockfish
- Sablefish
- Salmon
- Shrimp
- Squid

Economic Impacts

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.¹ In 2014, the Pacific Region's seafood industry impacts were largest in California, followed by Washington and Oregon. The seafood industry generated the following sales impacts: \$23 billion in California, \$7.3 billion in Washington and \$1.4 billion in Oregon. Income impacts were \$5 billion in California, \$2 billion in Washington and \$0.5 billion in Oregon. Value added impacts were \$8.3 billion in California, \$3 billion in Washington and \$0.7 billion in Oregon. Employment impacts were 143,000 jobs in California, 63,000 jobs in Washington and 20,000 jobs in Oregon.

The importers sector generated the greatest employment impacts in California (63,000 jobs), followed by the retail sector with 58,000 jobs. In Washington, the

retail sector (23,000 jobs) generated the largest employment impacts, followed by the seafood processors and dealers sector (16,000 jobs). In Oregon, the retail sector (10,000 jobs) generated the largest employment impacts, followed by the commercial harvesters sector (5,600 jobs). The importers sector contributed more to the total value-added impacts than any other single sector in both California and Washington.

Landings Revenue

Landings revenue in the Pacific Region totaled \$754 million in 2014. This was an 82 percent increase (a 55% increase in real terms after adjusting for inflation) from 2005 levels and a 10 percent decrease from 2013. Totaling \$492 million in 2014, shellfish revenue experienced a 99 percent increase (a 69% increase in real terms) from 2005 to 2014, and experienced an 11 percent decrease from 2013 to 2014. Crab (\$199 million) and other shellfish (\$166 million) had the highest landings revenue in the Pacific Region in 2014. Together, they accounted for 48 percent of total landings revenue but only 7 percent of total landings in the Pacific Region.

Between 2005 and 2014, the landings revenue for crab increased 105 percent (74% in real terms) and increased 54 percent (31% in real terms) for other shellfish. From 2005 to 2014, shrimp experienced the largest increase in landings revenue (289% nominal, 230% real). Oregon accounted for almost half (48%) of the region's shrimp landings revenue in 2014, increasing 21 percent from 2013 levels and 325 percent from 2005 levels. The Oregon pink shrimp fishery was certified as a sustainable fishery by the MSC in 2007 and recertified in 2013 as sustainable. The Washington State pink shrimp fishery was certified as sustainable for the first time in 2013.

Landings revenue for squid also increased substantially (130% nominal, 95% real) largely due to favorable ocean conditions and high demand in foreign markets. Only flatfish (-2%) experienced a decline in landings revenue from 2005 to 2014. Between 2013 and 2014, only shrimp (43%) and sablefish (24%) experienced an increase in revenue. Crab (-20%), albacore tuna (-19%) and other shellfish (-16%) experienced the largest decreases in landings revenue during this peri-

¹ 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).

od. Washington had the highest finfish landings revenue (\$88 million), followed by Oregon (\$78 million) and California (\$61 million). Shellfish landings revenue was also dominated by Washington (\$238 million), followed by California (\$174 million) and Oregon (\$80 million).

Landings

Fishermen in the Pacific Region landed 1.2 billion pounds of finfish and shellfish in 2014. This was a 7 percent decrease from 2005 and a 5 percent year-over-year decrease from 2013. Finfish landings contributed 68 percent of total landings in the Pacific Region (816 million pounds) in 2014. Finfish landed volume decreased 24 percent over the 10-year period (2005 to 2014), and decreased 4 percent from 2013 to 2014. Shellfish landings increased 69 percent from 2005 to 2014, but declined 6 percent from 2013 to 2014 to 390 million pounds. Hake (Pacific whiting) at 575 million pounds, and squid at 228 million pounds were the species or species groups with the largest landings volume in the Pacific region in 2014.

Shrimp landings more than tripled (257%) and squid landings almost doubled (85%) from 2005 to 2014. Sablefish (-30%), flatfish (-24%), and crab (-16%) had the largest landings declines during this period. From 2013 to 2014, only hake, shrimp, and sablefish landings increased, up 14 percent, 30 percent, and 5 percent respectively. Salmon landings declined 35 percent from 2013 to 2014, largely due to the decline in pink salmon landings, which tend to have weak runs in even years. Landings of the high-valued chinook and coho salmon both increased in 2014 compared to 2013, reflecting projected increases in abundance. Crab landings (-40%) and other shellfish landings (-29%) also declined significantly during this period.

Prices

The ex-vessel prices for the Pacific Region's key species and species groups in 2014 were higher than their 10-year average for nine of the 10 key species (in real terms, prices increased for eight of the 10 key species). Ex-vessel prices for crab (143%, 106% in real terms), followed by hake (100%, 67% in real terms) and sablefish (70%, 45% in real terms) experienced the biggest increases between 2005 and 2014. Compared with the ex-vessel prices in 2013, prices for the Pacific Region's salmon (up

41%) and crab (up 34%) experienced the largest increases. Only prices for hake and albacore tuna (down 17% and 16%, respectively) declined from 2013 to 2014.

Commercial Fisheries Facts

Landings revenue

- On average between 2005 and 2014, the key species or species groups accounted for 93 percent of total revenue, generating \$548 million in the Pacific Region.
- On average, landings revenue in the Pacific region was split between shellfish (63%) and finfish (37%).
- Crab had the highest annual average landings revenue in the region from 2005 to 2014 at \$153 million.

Landings

- Key species or species groups contributed an average of 80 percent annually to total landings between 2005 and 2014, or 903 million pounds.
- On average, landings volume in the Pacific region was split between shellfish (28%) and finfish (72%).
- Hake (whiting), contributed the most to landings in the region, averaging 465 million pounds from 2005 to 2014.

Prices

- Other shellfish had the highest average annual ex-vessel price per pound (\$4.80) between 2005 to 2014, followed by crab (\$2.50) and sablefish (\$2.19).
- Hake (whiting) had the lowest average annual ex-vessel price per pound (\$0.09) during the period, followed by squid (\$0.28) and flatfish (\$0.45).

RECREATIONAL FISHERIES

In 2014, almost 1.5 million recreational anglers took 6.4 million fishing trips in the Pacific Region. About 69 percent of these anglers were residents of a regional coastal county. Of the total saltwater fishing trips taken, 53 percent were in the shore sector and another 30 percent were in the private boat sector. The most frequently caught species or species groups in the Pacific Region included rockfishes & scorpionfishes; surfperches; and barracuda, bass & bonito.

Economic Impacts and Expenditures

The contribution of recreational fishing activities in the Pacific Region² are reported in terms of economic impacts at the state level (employment, sales, income

and value-added impacts) and expenditures on fishing trips and durable equipment at the regional level. Employment impacts in California were the highest in the Region, with 22,737 full- and part-time employment impacts generated by recreational fishing activities in the state. Washington (6,180 jobs) and Oregon (3,333 jobs) followed in terms of employment impacts generated by recreational fishing activities.

Recreational Fishing Facts

Participation

- An average of 1.6 million anglers fished in the Pacific Region annually from 2005 to 2014.
- Residents of coastal counties within the Pacific Region accounted for an average of 71 percent of total anglers annually during the 10-year period.

Fishing trips

- In the Pacific Region, an average of 6.5 million fishing trips were taken annually from 2005 to 2014.
- Private or rental boat and shore-based fishing trips accounted for an annual average of 1.7 million and 4.1 million fishing trips, respectively, from 2005 to 2014.

Harvest and release

- Rockfish and scorpionfish was the most commonly caught key species or species group, averaging 2.5 million fish during the 10-year period.
- Of the 10 commonly caught key species or species groups, six were harvested more often than released during this period.

In addition to employment impacts, the contribution of recreational fishing activities to the Pacific Region's economy can be measured in terms of sales impacts and the contribution of these activities to gross domestic product (value-added impacts). In 2014, sales impacts were highest in California (\$2.7 billion), followed by Washington (\$690 million) and Oregon (\$298 million).

The total saltwater fishing trip and durable equipment expenditures were \$3 billion across the Pacific Region in 2014. Approximately 77 percent of these expenditures were durable equipment purchases. The greatest durable goods expenditures were for boat expenses (\$1.1 billion), followed by fishing tackle (\$546.3 million) and vehicle expenses (\$315.7 million). Fishing trip-related

expenditures by the Pacific Region's non-residents totaled \$65.4 million, of which the greatest portion can be attributed to trips in the for-hire sector (\$48.9 million). Residents of the Pacific Region spent \$627.8 million on trip-related expenses, with the greatest of these expenses related to the private boat sector (\$220.2 million).

Key Pacific Region Recreational Species

- | | |
|------------------------------|---------------------------------|
| • Albacore and other tunas | • Mackerel |
| • Barracuda, bass and bonito | • Rockfishes and scorpionfishes |
| • Croakers | • Salmon |
| • Flatfishes | • Sculpins |
| • Greenlings | • Surfperches |

Participation

There were 1.5 million recreational anglers who fished in the Pacific Region in 2014. This was a 3 percent increase from 2005 (1.4 million anglers). These anglers were Pacific Region residents from either a coastal (1 million anglers) or non-coastal county (459,000 anglers). Approximately 69 percent of total anglers in 2014 were residents of a coastal county. Coastal county angler participation in 2014 remained unchanged from 2005 (1 million anglers) and experienced an 11 percent decrease between 2013 and 2014. Non-coastal county angler participation experienced a 12 percent increase from 2005 (409,000 anglers) and experienced a 10 percent decrease from 2013 (511,000 anglers).

Fishing Trips

Recreational fishermen took 6.4 million fishing trips in the Pacific Region in 2014. This remained unchanged from 2005 and was a 14 percent decrease from 2013. Of the total trips taken in the Pacific Region in 2014, 53 percent of the trips were from the shore sector and 30 percent of the trips were from the private boat sector.

Harvest and Release

The Pacific Region's species and species groups caught most frequently in 2014 were rockfishes & scorpionfishes (4.5 million fish), surfperches (2.4 million fish) and barracuda, bass & bonito (2.1 million fish). Between 2005 and 2014, five of the Pacific Region's key species or species groups showed decreases in catch totals, with the largest decreases occurring among croakers

² Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/Marine-Angler-Durable-Expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

(-73%), salmon (-55%) and mackerel (-40%). Large increases in the number of fish caught between 2005 and 2014 were observed in albacore & other tunas (590%), flatfishes (25%), and greenlings (15%).

MARINE ECONOMY

Across all sectors of the economy in California, Oregon and Washington, about 17 million full- and part-time employees were employed by about 1.2 million establishments in 2013.³ Annual payroll totaled \$934 billion. Total employee compensation in the Pacific Region totaled \$1.5 trillion, and the combined gross state product of all states totaled about \$2.8 trillion.⁴

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.⁵ 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 national CFLQ is 1. If a state CFLQ is less than 1, then less commercial fishing occurs in this state than the national average. If a state CFLQ is greater than 1, then more commercial fishing occurs in this state than the national average.

In 2013, the CFLQ for Washington was the highest in the region at 12.13. Washington's CFLQ suggests that the level of employment in commercial fishing-related industries in this state is approximately 12.13 times higher than the level of employment in these industries nationwide. The 2013 CFLQ in Oregon was second highest in the region at 4.07.

Seafood Sales and Processing

From 2005 to 2013, the number of non-employer firms (businesses that have no paid employees and are subject to federal income tax) engaged in seafood product preparation and packaging in the Pacific Region increased 39 percent to 210 firms. The greatest number of these non-employer firms was located in California (157). Annual receipts decreased 11 percent to about \$14 million in 2013 (a 32% decrease in real terms).

From 2005 to 2013, employer establishments en-

gaged in seafood product preparation and packaging decreased 10 percent, to 149 firms. The biggest number of Pacific Region employer firms in this sector was located in Washington (86). The number of employees decreased 5 percent to 9,002. Annual payroll increased 17 percent to about \$410 million in 2013 (a 10% decrease in real terms).

Employer establishments in the wholesale seafood sales sector increased 12 percent from 2005 to 2013, to 455. The largest number of wholesaling establishments was located in California (320). The number of employees decreased 3 percent to 4,859. Annual payroll increased 35 percent to about \$239 million in 2013 (a 4% increase in real terms).

The number of non-employer firms in the retail seafood sector in the Pacific Region increased 27 percent to 259 firms in 2013. The greatest number of these non-employer firms was located in California (218). Annual receipts increased 10 percent to about \$22 million in 2013 (a 16% decrease in real terms). Employer establishments engaged in seafood retail decreased 16 percent from 2005 to 2013, to 210 firms. The biggest number of Pacific Region employer firms in this sector was located in California (155). The number of employees increased 3 percent to 1,532. Annual payroll increased 27 percent to about \$40 million in 2013 (a 3% decrease in real terms).

Transport, Support and Marine Operations

The size of the Transport, Support and Marine Operations sectors in the Pacific Region is difficult to assess because much of the state-level data is suppressed for confidentiality purposes. It is clear, however, that these sectors play an important role in the regional economy. For example, there were 394 establishments classified as marinas, employing 2,832 workers and spending \$95 million on payroll in 2013 in Washington, Oregon, and California combined. The Ship and Boat Building Sector consisted of 283 establishments, employing 19,444 workers and contributing \$891 million in payroll across all three states in the region.

³ Unless otherwise stated, data is from the U.S. Census Bureau, <http://censtats.census.gov/> (accessed September 15, 2014).

⁴ 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).

⁵ U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

Tables | Pacific Region



2014 Economic Impacts of the Pacific Seafood Industry (thousands of dollars)

| | Landings Revenue | With Imports | | | | Without Imports | | | |
|------------|------------------|--------------|------------|-----------|-------------|-----------------|-----------|---------|-------------|
| | | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| California | 234,780 | 143,440 | 23,195,894 | 5,017,023 | 8,305,666 | 18,178 | 1,332,882 | 500,573 | 688,257 |
| Oregon | 157,912 | 20,051 | 1,404,355 | 469,255 | 665,609 | 16,619 | 852,810 | 356,155 | 474,845 |
| Washington | 326,248 | 63,382 | 7,330,457 | 2,015,266 | 3,041,830 | 27,467 | 1,764,743 | 730,773 | 988,672 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 414,584 | 471,788 | 459,772 | 500,447 | 501,938 | 566,579 | 729,785 | 674,465 | 833,790 | 754,081 |
| Finfish & Other | 166,922 | 176,425 | 176,104 | 215,784 | 168,495 | 202,527 | 260,625 | 245,668 | 278,569 | 262,294 |
| Shellfish | 247,662 | 295,363 | 283,668 | 284,663 | 333,442 | 364,052 | 469,160 | 428,798 | 555,222 | 491,787 |
| Key Species | | | | | | | | | | |
| Albacore tuna | 20,574 | 23,767 | 21,612 | 28,845 | 27,541 | 28,780 | 43,347 | 45,827 | 41,930 | 33,819 |
| Crab | 97,127 | 143,758 | 121,136 | 107,107 | 123,865 | 132,843 | 182,085 | 176,880 | 249,569 | 198,694 |
| Flatfish | 13,816 | 12,974 | 14,462 | 15,738 | 14,155 | 10,511 | 11,225 | 11,636 | 15,479 | 13,570 |
| Hake (whiting) | 29,139 | 34,425 | 32,603 | 58,492 | 14,104 | 27,316 | 52,869 | 47,054 | 61,321 | 58,630 |
| Other shellfish | 107,438 | 116,161 | 120,569 | 129,947 | 142,348 | 142,227 | 181,122 | 150,197 | 196,121 | 165,501 |
| Rockfish | 6,559 | 6,848 | 7,541 | 9,257 | 8,974 | 9,226 | 9,446 | 9,421 | 9,871 | 9,810 |
| Sablefish | 20,366 | 22,991 | 20,984 | 27,279 | 34,481 | 35,977 | 44,873 | 28,108 | 19,574 | 24,272 |
| Salmon | 37,188 | 34,306 | 33,865 | 26,992 | 24,986 | 48,986 | 53,456 | 47,542 | 76,993 | 70,431 |
| Shrimp | 15,706 | 12,433 | 17,298 | 25,132 | 16,594 | 21,941 | 40,638 | 40,326 | 42,614 | 61,041 |
| Squid | 31,516 | 26,998 | 29,169 | 26,585 | 56,928 | 71,173 | 66,557 | 63,894 | 73,720 | 72,412 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-----------|-----------|-----------|-----------|---------|-----------|-----------|-----------|-----------|-----------|
| Total Landings | 1,301,649 | 1,169,906 | 1,109,222 | 1,091,673 | 899,043 | 1,065,499 | 1,176,780 | 1,070,065 | 1,264,760 | 1,205,691 |
| Finfish & Other | 1,070,529 | 935,523 | 902,887 | 906,773 | 582,120 | 650,822 | 756,733 | 719,517 | 848,991 | 815,882 |
| Shellfish | 231,120 | 234,383 | 206,335 | 184,900 | 316,923 | 414,677 | 420,047 | 350,548 | 415,770 | 389,809 |
| Key Species | | | | | | | | | | |
| Albacore tuna | 19,649 | 28,117 | 25,483 | 24,507 | 27,055 | 25,477 | 24,284 | 30,638 | 28,471 | 27,596 |
| Crab | 61,849 | 85,301 | 51,888 | 45,075 | 59,158 | 61,668 | 66,518 | 52,860 | 87,154 | 52,055 |
| Flatfish | 31,495 | 27,689 | 33,502 | 37,409 | 40,599 | 33,281 | 25,557 | 24,439 | 28,778 | 23,844 |
| Hake (whiting) | 569,273 | 558,078 | 454,533 | 531,277 | 253,053 | 355,216 | 496,363 | 347,171 | 505,614 | 574,921 |
| Other shellfish | 30,907 | 30,611 | 29,543 | 28,557 | 30,733 | 28,166 | 29,318 | 27,245 | 39,779 | 28,407 |
| Rockfish | 7,406 | 6,633 | 7,447 | 9,469 | 10,458 | 11,038 | 9,910 | 10,406 | 10,794 | 10,719 |
| Sablefish | 13,742 | 13,718 | 11,630 | 12,978 | 15,822 | 15,055 | 14,139 | 11,580 | 9,156 | 9,622 |
| Salmon | 27,249 | 29,172 | 24,600 | 19,040 | 33,742 | 30,693 | 41,799 | 24,307 | 56,553 | 36,666 |
| Shrimp | 26,069 | 20,290 | 26,497 | 35,799 | 33,456 | 46,191 | 66,686 | 66,319 | 71,505 | 93,098 |
| Squid | 123,090 | 108,561 | 109,464 | 85,200 | 205,643 | 288,678 | 267,983 | 214,988 | 230,365 | 227,979 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|------|------|------|------|------|------|------|------|------|------|
| Albacore tuna | 1.05 | 0.85 | 0.85 | 1.18 | 1.02 | 1.13 | 1.78 | 1.50 | 1.47 | 1.23 |
| Crab | 1.57 | 1.69 | 2.33 | 2.38 | 2.09 | 2.15 | 2.74 | 3.35 | 2.86 | 3.82 |
| Flatfish | 0.44 | 0.47 | 0.43 | 0.42 | 0.35 | 0.32 | 0.44 | 0.48 | 0.54 | 0.57 |
| Hake (whiting) | 0.05 | 0.06 | 0.07 | 0.11 | 0.06 | 0.08 | 0.11 | 0.14 | 0.12 | 0.10 |
| Other shellfish | 3.48 | 3.79 | 4.08 | 4.55 | 4.63 | 5.05 | 6.18 | 5.51 | 4.93 | 5.83 |
| Rockfish | 0.89 | 1.03 | 1.01 | 0.98 | 0.86 | 0.84 | 0.95 | 0.91 | 0.91 | 0.92 |
| Sablefish | 1.48 | 1.68 | 1.80 | 2.10 | 2.18 | 2.39 | 3.17 | 2.43 | 2.14 | 2.52 |
| Salmon | 1.36 | 1.18 | 1.38 | 1.42 | 0.74 | 1.60 | 1.28 | 1.96 | 1.36 | 1.92 |
| Shrimp | 0.60 | 0.61 | 0.65 | 0.70 | 0.50 | 0.48 | 0.61 | 0.61 | 0.60 | 0.66 |
| Squid | 0.26 | 0.25 | 0.27 | 0.31 | 0.28 | 0.25 | 0.25 | 0.30 | 0.32 | 0.32 |

2014 Economic Impacts of the Pacific Recreational Fishing Expenditures (thousands of dollars, trips)

| | Trips | #Jobs | Sales | Income | Value Added |
|------------|--------------|--------------|--------------|---------------|--------------------|
| California | 4,401 | 22,737 | 2,657,497 | 1,139,897 | 1,777,155 |
| Oregon | 731 | 3,333 | 297,993 | 143,382 | 203,335 |
| Washington | 1,300 | 6,180 | 690,425 | 287,917 | 477,561 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|--------------------------|-----------|----------------------------|-----------------------------------|
| | Non-residents | Residents | Fishing Tackle | 546,312 |
| For-Hire | 48,882 | 207,820 | Other Equipment | 274,943 |
| Private Boat | 10,603 | 220,241 | Boat Expenses | 1,121,769 |
| Shore | 5,947 | 199,784 | Vehicle Expenses | 315,711 |
| Total | 65,431 | 627,846 | Second Home Expenses | 4,116 |
| | | | Total Durable Expenditures | 2,262,848 |
| Total State Trip and Durable Goods Expenditures | | | | 2,956,125 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Coastal | 1,028 | 1,257 | 1,184 | 1,065 | 1,136 | 1,047 | 1,069 | 1,181 | 1,151 | 1,027 |
| Non-Coastal | 409 | 481 | 379 | 385 | 638 | 384 | 390 | 468 | 511 | 459 |
| Out-of-State | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Total Anglers | 1,437 | 1,738 | 1,563 | 1,450 | 1,774 | 1,431 | 1,459 | 1,649 | 1,662 | 1,486 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| For-Hire | 624 | 635 | 605 | 514 | 492 | 455 | 654 | 647 | 725 | 1,082 |
| Private | 1,849 | 1,761 | 1,828 | 1,421 | 1,471 | 1,432 | 1,659 | 1,806 | 1,912 | 1,935 |
| Shore | 3,962 | 4,548 | 3,818 | 3,846 | 4,345 | 3,739 | 3,792 | 4,973 | 4,859 | 3,415 |
| Total Trips | 6,435 | 6,944 | 6,251 | 5,781 | 6,308 | 5,626 | 6,105 | 7,426 | 7,496 | 6,432 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------------------|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Albacore & other tunas | H | 18 | 33 | 47 | 27 | 37 | 52 | 24 | 90 | 74 | 112 |
| | R | 2 | 3 | 7 | 0 | 13 | 2 | 6 | 36 | 53 | 26 |
| Barracuda, bass & bonito | H | 1015 | 668 | 537 | 434 | 412 | 373 | 435 | 371 | 215 | 453 |
| | R | 2011 | 1660 | 1407 | 1093 | 1211 | 991 | 738 | 775 | 1112 | 1658 |
| Croakers | H | 572 | 456 | 427 | 321 | 427 | 173 | 128 | 256 | 173 | 136 |
| | R | 618 | 553 | 631 | 272 | 362 | 340 | 98 | 231 | 257 | 181 |
| Flatfishes | H | 560 | 325 | 260 | 344 | 329 | 417 | 641 | 561 | 713 | 994 |
| | R | 513 | 520 | 338 | 361 | 297 | 277 | 222 | 296 | 459 | 350 |
| Greenlings | H | 268 | 234 | 192 | 169 | 188 | 158 | 227 | 272 | 316 | 350 |
| | R | 283 | 209 | 153 | 141 | 194 | 197 | 292 | 306 | 283 | 284 |
| Mackerel | H | 1023 | 1158 | 823 | 940 | 753 | 479 | 590 | 438 | 246 | 483 |
| | R | 1872 | 3287 | 1209 | 1765 | 1267 | 1272 | 1050 | 806 | 656 | 1260 |
| Rockfishes & scorpionfishes | H | 3032 | 2173 | 1934 | 1534 | 1628 | 1821 | 2583 | 3039 | 3472 | 3588 |
| | R | 1091 | 691 | 475 | 418 | 638 | 520 | 505 | 861 | 1002 | 949 |
| Salmon ³ | H | 432 | 223 | 450 | 104 | 808 | 162 | 384 | 467 | 549 | 193 |
| | R | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Sculpins | H | 72 | 55 | 49 | 60 | 59 | 53 | 91 | 68 | 70 | 60 |
| | R | 238 | 222 | 208 | 228 | 200 | 198 | 238 | 229 | 298 | 199 |
| Surfperches | H | 945 | 1164 | 861 | 832 | 752 | 638 | 1017 | 1144 | 1034 | 1125 |
| | R | 1242 | 1675 | 861 | 817 | 706 | 452 | 931 | 1279 | 1006 | 1281 |

¹ NA = data are not available because out-of-state resident information is collected for individual states, but whether an angler is a resident of a region is not specified.

² In this table, '0' = 0-999 fish.

³ Salmon harvest estimates exclude release mortality.

Tables | California



California | Commercial Fisheries

2014 Economic Impacts of the California Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|------------|-----------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 143,440 | 23,195,894 | 5,017,023 | 8,305,666 | 18,178 | 1,332,882 | 500,573 | 688,257 |
| Commercial Harvesters | 4,996 | 471,324 | 160,798 | 235,741 | 4,996 | 471,324 | 160,798 | 235,741 |
| Seafood Processors & Dealers | 5,364 | 548,555 | 203,409 | 269,904 | 2,082 | 212,945 | 78,962 | 104,774 |
| Importers | 62,820 | 17,280,401 | 2,769,514 | 5,267,823 | - | - | - | - |
| Seafood Wholesalers & Distributors | 12,643 | 1,782,354 | 578,107 | 807,655 | 711 | 100,257 | 32,518 | 45,430 |
| Retail | 57,617 | 3,113,261 | 1,305,196 | 1,724,543 | 10,388 | 548,356 | 228,295 | 302,311 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 116,084 | 129,907 | 127,580 | 120,861 | 159,253 | 187,263 | 222,160 | 243,963 | 255,444 | 234,780 |
| Finfish & Other | 46,640 | 43,164 | 50,363 | 46,968 | 46,682 | 44,291 | 55,805 | 55,245 | 65,075 | 60,746 |
| Shellfish | 69,444 | 86,743 | 77,217 | 73,893 | 112,571 | 142,971 | 166,355 | 188,718 | 190,370 | 174,034 |
| Key Species | | | | | | | | | | |
| Crab | 19,653 | 46,483 | 28,626 | 24,227 | 32,508 | 43,016 | 53,762 | 88,207 | 91,851 | 70,258 |
| Pacific sardine | 3,150 | 5,100 | 8,218 | 7,575 | 5,544 | 4,366 | 4,398 | 4,249 | 1,510 | 2,002 |
| Rockfish | 4,145 | 4,630 | 4,924 | 5,781 | 5,330 | 5,453 | 5,644 | 5,170 | 5,748 | 5,595 |
| Sablefish | 4,295 | 4,892 | 4,873 | 6,224 | 9,765 | 11,491 | 15,121 | 8,988 | 7,047 | 8,942 |
| Salmon | 12,804 | 5,261 | 7,835 | 6 | NA | 1,215 | 5,096 | 12,850 | 22,957 | 12,124 |
| Sea urchins | 6,156 | 5,145 | 5,400 | 6,550 | 7,806 | 7,413 | 8,102 | 8,320 | 9,832 | 9,058 |
| Shrimp | 4,338 | 4,213 | 4,064 | 5,696 | 5,462 | 4,951 | 8,598 | 8,492 | 9,520 | 11,778 |
| Spiny lobster | 6,039 | 8,111 | 6,916 | 8,008 | 7,934 | 11,386 | 12,972 | 13,749 | 13,842 | 18,239 |
| Squid | 31,467 | 26,959 | 29,131 | 26,477 | 56,877 | 71,165 | 66,546 | 63,886 | 73,701 | 72,383 |
| Swordfish | 1,896 | 2,695 | 3,127 | 2,365 | 1,932 | 2,203 | 3,350 | 2,090 | 2,699 | 2,920 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 442,353 | 341,661 | 384,826 | 323,884 | 376,053 | 439,440 | 409,837 | 353,875 | 363,798 | 358,451 |
| Finfish & Other | 301,993 | 203,107 | 258,625 | 223,912 | 147,934 | 120,103 | 108,131 | 101,789 | 89,744 | 98,674 |
| Shellfish | 140,360 | 138,554 | 126,200 | 99,972 | 228,120 | 319,336 | 301,706 | 252,086 | 274,054 | 259,778 |
| Key Species | | | | | | | | | | |
| Crab | 12,028 | 27,391 | 12,393 | 9,845 | 16,660 | 23,352 | 22,206 | 27,589 | 33,094 | 20,826 |
| Pacific sardine | 76,324 | 102,683 | 178,480 | 126,945 | 82,842 | 73,814 | 60,993 | 50,660 | 15,636 | 17,106 |
| Rockfish | 3,181 | 3,252 | 3,136 | 3,933 | 3,984 | 3,949 | 3,450 | 3,457 | 3,862 | 3,553 |
| Sablefish | 3,645 | 3,617 | 3,240 | 3,507 | 5,089 | 5,501 | 5,646 | 3,916 | 3,291 | 3,959 |
| Salmon | 4,962 | 1,184 | 1,743 | 1 | NA | 255 | 1,133 | 2,862 | 4,337 | 2,558 |
| Sea urchins | 11,304 | 10,664 | 11,131 | 10,283 | 12,205 | 11,230 | 11,465 | 11,443 | 12,945 | 11,834 |
| Shrimp | 2,944 | 1,197 | 2,015 | 3,011 | 3,596 | 4,522 | 8,217 | 7,255 | 9,712 | 9,872 |
| Spiny lobster | 761 | 886 | 663 | 741 | 706 | 716 | 751 | 876 | 764 | 952 |
| Squid | 122,887 | 108,410 | 109,150 | 84,071 | 205,278 | 288,497 | 267,890 | 214,867 | 230,061 | 227,781 |
| Swordfish | 653 | 1,187 | 1,210 | 1,168 | 898 | 815 | 1,365 | 887 | 1,174 | 1,191 |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|
| Crab | 1.63 | 1.70 | 2.31 | 2.46 | 1.95 | 1.84 | 2.42 | 3.20 | 2.78 | 3.37 |
| Pacific sardine | 0.04 | 0.05 | 0.05 | 0.06 | 0.07 | 0.06 | 0.07 | 0.08 | 0.10 | 0.12 |
| Rockfish | 1.30 | 1.42 | 1.57 | 1.47 | 1.34 | 1.38 | 1.64 | 1.50 | 1.49 | 1.57 |
| Sablefish | 1.18 | 1.35 | 1.50 | 1.77 | 1.92 | 2.09 | 2.68 | 2.29 | 2.14 | 2.26 |
| Salmon | 2.58 | 4.44 | 4.50 | 4.16 | NA | 4.76 | 4.50 | 4.49 | 5.29 | 4.74 |
| Sea urchins | 0.54 | 0.48 | 0.49 | 0.64 | 0.64 | 0.66 | 0.71 | 0.73 | 0.76 | 0.77 |
| Shrimp | 1.47 | 3.52 | 2.02 | 1.89 | 1.52 | 1.09 | 1.05 | 1.17 | 0.98 | 1.19 |
| Spiny lobster | 7.93 | 9.15 | 10.44 | 10.80 | 11.24 | 15.91 | 17.27 | 15.69 | 18.11 | 19.16 |
| Squid | 0.26 | 0.25 | 0.27 | 0.31 | 0.28 | 0.25 | 0.25 | 0.30 | 0.32 | 0.32 |
| Swordfish | 2.90 | 2.27 | 2.58 | 2.03 | 2.15 | 2.70 | 2.46 | 2.36 | 2.30 | 2.45 |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of California Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|---------------------------------|--------------|--------|-----------|-----------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 3,158 | 399,310 | 176,688 | 248,046 |
| | Private Boat | 891 | 140,151 | 48,872 | 83,640 |
| | Shore | 1,743 | 244,352 | 86,110 | 143,229 |
| Total Durable Expenditures | | 16,945 | 1,873,684 | 828,227 | 1,302,240 |
| Total State Economic Impacts | | 22,737 | 2,657,497 | 1,139,897 | 1,777,155 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 429,591 |
| For-Hire | 43,192 | 170,457 | Other Equipment | 213,697 |
| Private Boat | 5,058 | 92,881 | Boat Expenses | 682,634 |
| Shore | 4,088 | 168,477 | Vehicle Expenses | 218,172 |
| Total | 52,337 | 431,815 | Second Home Expenses | 0 |
| Total Durable Expenditures | | | | 1,544,093 |
| Total State Trip and Durable Goods Expenditures | | | | 2,028,245 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 740 | 991 | 878 | 819 | 888 | 803 | 714 | 921 | 873 | 705 |
| Non-Coastal | 263 | 335 | 226 | 246 | 490 | 241 | 238 | 316 | 352 | 299 |
| Out-of-State | 79 | 109 | 65 | 83 | 71 | 69 | 93 | 86 | 95 | 132 |
| Total Anglers | 1,082 | 1,435 | 1,169 | 1,148 | 1,449 | 1,113 | 1,045 | 1,323 | 1,320 | 1,136 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 504 | 522 | 489 | 424 | 385 | 357 | 560 | 544 | 609 | 929 |
| Private | 902 | 896 | 768 | 640 | 676 | 655 | 682 | 799 | 797 | 803 |
| Shore | 3,216 | 3,802 | 3,072 | 3,100 | 3,599 | 2,993 | 3,046 | 4,227 | 4,113 | 2,669 |
| Total Trips | 4,622 | 5,220 | 4,329 | 4,164 | 4,660 | 4,005 | 4,288 | 5,570 | 5,519 | 4,401 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)^{1,4}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Flatfishes | H | 478 | 241 | 187 | 276 | 258 | 353 | 575 | 492 | 642 | 924 |
| | R | 465 | 471 | 292 | 313 | 241 | 231 | 176 | 249 | 411 | 303 |
| Rockfishes & scorpionfishes | H | 2,725 | 1,891 | 1,674 | 1,318 | 1,383 | 1,613 | 2,348 | 2,780 | 3,197 | 3,284 |
| | R | 1,058 | 668 | 456 | 402 | 605 | 494 | 483 | 839 | 977 | 919 |
| Greenlings | H | 125 | 104 | 69 | 48 | 64 | 38 | 88 | 118 | 144 | 194 |
| | R | 179 | 113 | 67 | 53 | 83 | 96 | 178 | 200 | 180 | 196 |
| Salmon ² | H | 144 | 98 | 48 | 0 | 1 | 15 | 50 | 123 | 114 | 75 |
| | R | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Sculpins | H | 39 | 25 | 19 | 29 | 27 | 21 | 58 | 37 | 40 | 32 |
| | R | 87 | 74 | 58 | 78 | 50 | 46 | 86 | 77 | 144 | 48 |
| Surfperches | H | 694 | 913 | 610 | 581 | 501 | 387 | 766 | 892 | 782 | 873 |
| | R | 1,083 | 1,516 | 702 | 658 | 546 | 292 | 771 | 1,119 | 846 | 1,121 |
| Albacore & other tunas | H | 6 | 9 | 22 | 5 | 13 | 20 | 8 | 39 | 19 | 37 |
| | R | 2 | 3 | 7 | 0 | 13 | 2 | 6 | 36 | 36 | 26 |
| Barracuda, bass & bonito ³ | H | 1,015 | 668 | 537 | 434 | 412 | 373 | 435 | 371 | 215 | 453 |
| | R | 2,011 | 1,660 | 1,407 | 1,093 | 1,211 | 991 | 738 | 775 | 1,112 | 1,658 |
| Mackerel | H | 1,023 | 1,158 | 823 | 940 | 753 | 479 | 590 | 438 | 246 | 483 |
| | R | 1,872 | 3,287 | 1,209 | 1,765 | 1,267 | 1,272 | 1,050 | 806 | 656 | 1,260 |
| Croakers | H | 572 | 456 | 427 | 321 | 427 | 173 | 128 | 256 | 173 | 136 |
| | R | 618 | 553 | 631 | 272 | 362 | 340 | 98 | 231 | 257 | 181 |

¹ In this table, '0' = 0-999 fish and '1' = 1,000-1,499 thousand fish.² Salmon harvest estimates exclude release mortality.³ This species may not be equivalent to species with similar names listed in the commercial tables.⁴ NA = not available.

California's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|--------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 860,866 (11.5%) | 13,382,470 (11.5%) | 588.45 (13.1%) | 930.65 (13.1%) | 1,760.51 (13.5%) | 0.73 |
| 2013 | 874,243 (11.7%) | 13,401,863 (11.3%) | 742.52 (13.2%) | 1,160.08 (13.1%) | 2,212.99 (13.3%) | 0.6 |
| %Change | 1.5 | 0.1 | 20.7 | 19.8 | 20.4 | -17.8 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Firms | 88 | 91 | 121 | 139 | 159 | 184 | 187 | 151 | 157 |
| | Receipts | 10,207 | 8,298 | 10,842 | 11,460 | 10,852 | 9,695 | 9,788 | 9,283 | 9,866 |
| Seafood sales, retail | Firms | 166 | 163 | 222 | 210 | 202 | 203 | 209 | 236 | 218 |
| | Receipts | 16,892 | 19,875 | 19,703 | 19,892 | 17,095 | 19,021 | 18,006 | 18,238 | 18,581 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Seafood product prep. & packaging | Establishments | 48 | 47 | 49 | 45 | 47 | 48 | 48 | 41 | 44 |
| | Employees | 2,963 | 2,592 | 2,229 | 2,024 | 2,167 | 1,820 | 1,842 | 1,668 | 1,871 |
| | Payroll | 92,642 | 78,065 | 75,886 | 65,215 | 69,529 | 62,480 | 60,411 | 52,977 | 57,603 |
| Seafood sales, wholesale | Establishments | 258 | 252 | 300 | 278 | 289 | 314 | 404 | 275 | 320 |
| | Employees | 3,925 | 4,063 | 4,429 | 3,321 | 3,183 | 3,223 | 3,505 | 3,441 | 3,671 |
| | Payroll | 134,576 | 144,758 | 159,672 | 132,139 | 128,813 | 137,810 | 149,302 | 173,959 | 181,698 |
| Seafood sales, retail | Establishments | 180 | 184 | 182 | 161 | 153 | 158 | 157 | 149 | 155 |
| | Employees | 999 | 1,031 | 1,004 | 932 | 976 | 985 | 1,088 | 1,043 | 1,119 |
| | Payroll | 18,832 | 19,900 | 21,224 | 20,585 | 21,785 | 22,718 | 25,168 | 24,221 | 26,702 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 26 | 22 | 29 | 28 | 30 | 25 | 21 | 22 | 24 |
| | Employees | 1,346 | ds | ds | ds | ds | 554 | 395 | ds | ds |
| | Payroll | 129,262 | ds | ds | ds | ds | 30,431 | 24,708 | ds | ds |
| Deep sea freight transportation | Establishments | 54 | 54 | 51 | 43 | 41 | 54 | 51 | 45 | 34 |
| | Employees | ds | 957 | 1,643 | ds | ds | 2,562 | 2,464 | 2,431 | 2,073 |
| | Payroll | ds | 84,199 | 116,628 | ds | ds | 236,235 | 256,962 | 236,423 | 218,054 |
| Deep sea passenger transportation | Establishments | 15 | 16 | 13 | 5 | 5 | 3 | 2 | 2 | 4 |
| | Employees | ds | 1,552 | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | 72,119 | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 263 | 268 | 276 | 277 | 276 | 270 | 269 | 251 | 250 |
| | Employees | 2,426 | 2,457 | 2,680 | 2,652 | 2,514 | 2,390 | 2,401 | 2,237 | 2,199 |
| | Payroll | 71,318 | 74,778 | 80,216 | 85,315 | 78,890 | 80,631 | 82,958 | 71,777 | 72,737 |
| Marine cargo handling | Establishments | 54 | 52 | 56 | 61 | 62 | 63 | 71 | 38 | 64 |
| | Employees | 19,303 | 20,975 | 22,395 | 22,086 | 17,428 | 18,449 | 18,812 | 18,759 | ds |
| | Payroll | 1,273,698 | 1,448,623 | 1,484,308 | 1,453,281 | 1,211,572 | 1,273,268 | 1,333,805 | 1,351,874 | ds |
| Navigational services to shipping | Establishments | 37 | 36 | 39 | 40 | 39 | 41 | 45 | 35 | 36 |
| | Employees | ds | 817 | 858 | 815 | 804 | 765 | 760 | 800 | 805 |
| | Payroll | ds | 63,893 | 63,610 | 65,225 | 61,720 | 58,899 | 62,065 | 61,166 | 67,665 |
| Port & harbor operations | Establishments | 20 | 20 | 18 | 17 | 19 | 21 | 19 | 59 | 31 |
| | Employees | ds | 582 | 443 | 256 | 345 | 435 | 508 | ds | 651 |
| | Payroll | ds | 32,523 | 30,001 | 23,316 | 26,889 | 37,560 | 41,688 | ds | 52,401 |
| Ship & boat building | Establishments | 141 | 132 | 136 | 136 | 123 | 117 | 108 | 120 | 113 |
| | Employees | 10,132 | 9,801 | 9,250 | 11,630 | 10,483 | 9,720 | 9,165 | 12,681 | 12,651 |
| | Payroll | 410,446 | 453,255 | 433,846 | 477,300 | 460,239 | 448,338 | 434,449 | 544,819 | 537,438 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

Tables | Oregon



2014 Economic Impacts of the Oregon Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 20,051 | 1,404,355 | 469,255 | 665,609 | 16,619 | 852,810 | 356,155 | 474,845 |
| Commercial Harvesters | 5,616 | 295,216 | 125,258 | 173,485 | 5,616 | 295,216 | 125,258 | 173,485 |
| Seafood Processors & Dealers | 1,846 | 156,388 | 60,062 | 78,475 | 1,695 | 143,565 | 55,138 | 72,041 |
| Importers | 1,629 | 448,198 | 71,832 | 136,630 | - | - | - | - |
| Seafood Wholesalers & Distributors | 750 | 89,526 | 30,370 | 40,734 | 462 | 55,134 | 18,703 | 25,086 |
| Retail | 10,208 | 415,027 | 181,732 | 236,284 | 8,846 | 358,895 | 157,056 | 204,233 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|---------|--------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 88,196 | 106,093 | 97,298 | 103,042 | 106,959 | 106,378 | 148,354 | 128,222 | 179,215 | 157,912 |
| Finfish & Other | 53,192 | 46,326 | 47,589 | 56,912 | 52,749 | 58,730 | 76,718 | 72,327 | 81,445 | 78,247 |
| Shellfish | 35,005 | 59,767 | 49,709 | 46,130 | 54,210 | 47,648 | 71,636 | 55,895 | 97,770 | 79,665 |
| Key Species | | | | | | | | | | |
| Albacore tuna | 8,815 | 8,067 | 9,468 | 10,666 | 10,191 | 12,425 | 18,766 | 15,168 | 16,085 | 11,028 |
| Crab | 26,603 | 53,810 | 38,208 | 29,168 | 42,413 | 32,757 | 44,696 | 29,189 | 71,208 | 47,991 |
| Flatfish | 7,281 | 7,547 | 7,930 | 9,163 | 8,468 | 6,861 | 6,780 | 7,315 | 9,854 | 8,651 |
| Hake (whiting) | 7,107 | 7,974 | 6,501 | 6,830 | 3,783 | 5,414 | 16,518 | 14,611 | 20,405 | 18,274 |
| Oysters | 1,232 | 1,163 | 1,847 | 2,748 | 4,506 | 3,317 | 1,869 | 1,661 | 1,798 | 1,774 |
| Pacific sardine | 6,199 | 3,743 | 4,551 | 5,665 | 5,291 | 5,252 | 3,192 | 8,979 | 6,299 | 3,522 |
| Rockfish | 1,387 | 1,564 | 2,002 | 2,610 | 2,500 | 2,520 | 2,473 | 2,661 | 3,023 | 3,245 |
| Sablefish | 8,657 | 9,787 | 9,494 | 13,737 | 15,919 | 15,069 | 17,351 | 11,530 | 7,595 | 8,076 |
| Salmon | 10,437 | 4,940 | 4,647 | 4,166 | 3,546 | 7,698 | 6,737 | 6,950 | 12,422 | 20,131 |
| Shrimp | 6,901 | 4,494 | 9,365 | 13,937 | 6,813 | 11,006 | 24,607 | 24,685 | 24,153 | 29,326 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 312,636 | 282,846 | 253,543 | 195,688 | 199,458 | 201,974 | 274,533 | 296,091 | 339,589 | 291,623 |
| Finfish & Other | 278,646 | 236,998 | 216,134 | 155,837 | 154,147 | 153,588 | 208,445 | 237,821 | 265,454 | 227,339 |
| Shellfish | 33,990 | 45,848 | 37,410 | 39,851 | 45,311 | 48,386 | 66,088 | 58,270 | 74,136 | 64,284 |
| Key Species | | | | | | | | | | |
| Albacore tuna | 8,087 | 8,534 | 10,468 | 8,876 | 10,082 | 10,703 | 9,682 | 9,938 | 10,209 | 8,777 |
| Crab | 17,734 | 33,291 | 17,007 | 13,875 | 21,848 | 15,817 | 17,240 | 8,681 | 26,016 | 11,907 |
| Flatfish | 16,910 | 16,385 | 19,697 | 23,842 | 26,047 | 22,226 | 15,958 | 15,322 | 18,965 | 15,955 |
| Hake (whiting) | 135,503 | 122,804 | 81,481 | 55,511 | 53,466 | 57,017 | 142,092 | 102,651 | 160,098 | 161,589 |
| Oysters | 308 | 255 | 197 | 162 | 1,127 | 829 | 467 | 415 | 449 | 443 |
| Pacific sardine | 99,450 | 74,669 | 90,037 | 49,298 | 45,902 | 44,743 | 23,479 | 91,459 | 57,022 | 16,938 |
| Rockfish | 2,007 | 1,967 | 2,905 | 3,820 | 4,207 | 4,533 | 3,819 | 3,918 | 4,745 | 5,293 |
| Sablefish | 5,834 | 5,838 | 5,349 | 6,514 | 7,219 | 6,269 | 5,074 | 4,739 | 3,840 | 3,293 |
| Salmon | 4,666 | 1,810 | 1,370 | 1,860 | 2,311 | 2,765 | 2,386 | 1,918 | 3,505 | 6,383 |
| Shrimp | 15,784 | 12,128 | 19,990 | 25,400 | 22,019 | 31,429 | 48,198 | 49,009 | 47,472 | 51,728 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|------|------|------|-------|------|------|------|------|------|------|
| Albacore tuna | 1.09 | 0.95 | 0.90 | 1.20 | 1.01 | 1.16 | 1.94 | 1.53 | 1.58 | 1.26 |
| Crab | 1.50 | 1.62 | 2.25 | 2.10 | 1.94 | 2.07 | 2.59 | 3.36 | 2.74 | 4.03 |
| Flatfish | 0.43 | 0.46 | 0.40 | 0.38 | 0.33 | 0.31 | 0.42 | 0.48 | 0.52 | 0.54 |
| Hake (whiting) | 0.05 | 0.06 | 0.08 | 0.12 | 0.07 | 0.09 | 0.12 | 0.14 | 0.13 | 0.11 |
| Oysters | 4.00 | 4.56 | 9.40 | 16.96 | 4.00 | 4.00 | 4.00 | 4.00 | 4.00 | 4.00 |
| Pacific sardine | 0.06 | 0.05 | 0.05 | 0.11 | 0.12 | 0.12 | 0.14 | 0.10 | 0.11 | 0.21 |
| Rockfish | 0.69 | 0.80 | 0.69 | 0.68 | 0.59 | 0.56 | 0.65 | 0.68 | 0.64 | 0.61 |
| Sablefish | 1.48 | 1.68 | 1.78 | 2.11 | 2.21 | 2.40 | 3.42 | 2.43 | 1.98 | 2.45 |
| Salmon | 2.24 | 2.73 | 3.39 | 2.24 | 1.53 | 2.78 | 2.82 | 3.62 | 3.54 | 3.15 |
| Shrimp | 0.44 | 0.37 | 0.47 | 0.55 | 0.31 | 0.35 | 0.51 | 0.50 | 0.51 | 0.57 |

2014 Economic Impacts of Oregon Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 255 | 23,975 | 9,869 | 13,438 |
| | Private Boat | 465 | 44,970 | 18,292 | 27,557 |
| | Shore | 140 | 13,325 | 5,289 | 7,979 |
| Total Durable Expenditures | | 2,473 | 215,723 | 109,932 | 154,361 |
| Total State Economic Impacts | | 3,333 | 297,993 | 143,382 | 203,335 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 725 | 13,495 | Fishing Tackle | 47,888 |
| Private Boat | 2,901 | 37,037 | Other Equipment | 26,690 |
| Shore | 1,141 | 10,209 | Boat Expenses | 80,379 |
| Total | 4,767 | 60,741 | Vehicle Expenses | 64,812 |
| | | | Second Home Expenses | 4,116 |
| | | | Total Durable Expenditures | 223,884 |
| Total State Trip and Durable Goods Expenditures | | | | 289,392 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 87 | 82 | 86 | 79 | 85 | 82 | 81 | 84 | 89 | 91 |
| Non-Coastal | 123 | 125 | 130 | 120 | 128 | 124 | 122 | 128 | 133 | 136 |
| Out-of-State | 14 | 15 | 15 | 14 | 15 | 14 | 14 | 15 | 16 | 16 |
| Total Anglers | 224 | 222 | 231 | 213 | 228 | 220 | 217 | 227 | 238 | 243 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|------|------|------|------|------|------|------|------|------|------|
| For-Hire | 58 | 56 | 61 | 48 | 56 | 51 | 52 | 57 | 64 | 67 |
| Private | 382 | 373 | 399 | 353 | 396 | 378 | 370 | 389 | 414 | 431 |
| Shore | 233 | 233 | 233 | 233 | 233 | 233 | 233 | 233 | 233 | 233 |
| Total Trips | 673 | 662 | 693 | 634 | 685 | 662 | 655 | 679 | 711 | 731 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)^{1,3}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------|---|------|------|------|------|------|------|------|------|------|------|
| Baitfishes | H | 220 | 220 | 220 | 220 | 220 | 223 | 221 | 220 | 220 | 221 |
| | R | 124 | 124 | 124 | 124 | 124 | 125 | 125 | 125 | 125 | 125 |
| Flatfishes | H | 21 | 21 | 22 | 21 | 17 | 14 | 15 | 17 | 18 | 15 |
| | R | 7 | 7 | 6 | 8 | 9 | 5 | 5 | 6 | 6 | 5 |
| Greenlings | H | 104 | 97 | 95 | 92 | 90 | 90 | 97 | 111 | 132 | 114 |
| | R | 79 | 74 | 67 | 69 | 72 | 79 | 85 | 83 | 87 | 73 |
| Rockfishes | H | 400 | 331 | 321 | 307 | 363 | 373 | 290 | 320 | 402 | 411 |
| | R | 58 | 40 | 38 | 47 | 51 | 64 | 53 | 50 | 66 | 73 |
| Salmon ² | H | 42 | 16 | 68 | 14 | 91 | 23 | 24 | 35 | 45 | 118 |
| | R | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Sculpins | H | 16 | 14 | 15 | 16 | 16 | 16 | 16 | 15 | 14 | 12 |
| | R | 60 | 57 | 59 | 59 | 59 | 61 | 61 | 61 | 63 | 60 |
| Sturgeon | H | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 |
| | R | 24 | 24 | 24 | 24 | 24 | 25 | 25 | 25 | 25 | 25 |
| Surfperches | H | 118 | 118 | 118 | 118 | 118 | 118 | 118 | 118 | 118 | 118 |
| | R | 39 | 39 | 39 | 39 | 39 | 39 | 39 | 39 | 39 | 39 |
| Albacore tuna | H | 5 | 12 | 59 | 24 | 43 | 38 | 29 | 63 | 22 | 48 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

¹ In this table, '0' = 0-999 fish.² Salmon estimates exclude release mortality.³ NA = not available.

Oregon's State Economy (% of national total)

| | Establishments | Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 108,571 (1.4%) | 1,409,576 (1.2%) | 50.02 (1.1%) | 80.62 (1.1%) | 147.58 (1.1%) | 2.87 |
| 2013 | 108,527 (1.4%) | 1,396,563 (1.2%) | 61.06 (1.1%) | 100.37 (1.1%) | 204.87 (1.2%) | 4.07 |
| %Change | 0.0 | -0.9 | 18.1 | 19.7 | 28.0 | 41.8 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|------|------|-------|-------|-------|-------|-------|-------|------|
| Seafood product prep. & packaging | Firms | 9 | 7 | ds | 19 | 15 | 15 | 16 | 14 | 11 |
| | Receipts | 309 | 54 | ds | 957 | 466 | 510 | 467 | 346 | 319 |
| Seafood sales, retail | Firms | 7 | 11 | 11 | 16 | 12 | 15 | 16 | 11 | ds |
| | Receipts | 985 | 914 | 1,210 | 2,101 | 1,140 | 1,907 | 1,896 | 1,600 | ds |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 20 | 21 | 22 | 23 | 20 | 21 | 22 | 18 | 19 |
| | Employees | 762 | 896 | 819 | 850 | 812 | 806 | 805 | 934 | 907 |
| | Payroll | 19,022 | 25,881 | 27,394 | 27,616 | 26,202 | 27,007 | 32,438 | 31,970 | 37,265 |
| Seafood sales, wholesale | Establishments | 23 | 16 | 18 | 18 | 19 | 22 | 27 | 21 | 19 |
| | Employees | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 180 | 189 |
| | Payroll | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7,602 | 8,065 |
| Seafood sales, retail | Establishments | 24 | 22 | 23 | 21 | 23 | 21 | 20 | 18 | 20 |
| | Employees | 204 | 306 | 171 | 178 | 151 | 162 | 163 | 126 | 147 |
| | Payroll | 3,464 | 3,294 | 3,185 | 3,370 | 3,515 | 3,651 | 3,613 | 2,851 | 4,238 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

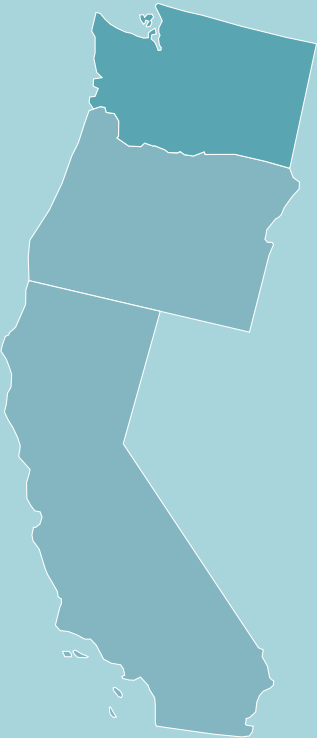
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 9 | 9 | 13 | 8 | 9 | 8 | 8 | 8 | 7 |
| | Employees | ds | ds | 476 | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | 25,206 | ds | ds | ds | ds | ds | ds |
| Deep sea freight transportation | Establishments | 6 | 6 | 5 | 4 | 3 | 3 | 3 | 3 | 3 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Employees | NA | NA | ds | NA | NA | NA | NA | NA | NA |
| | Payroll | NA | NA | ds | NA | NA | NA | NA | NA | NA |
| Marinas | Establishments | 40 | 37 | 38 | 37 | 33 | 30 | 33 | 32 | 34 |
| | Employees | 113 | ds | 138 | 106 | 109 | 102 | 102 | 119 | 104 |
| | Payroll | 3,550 | ds | 3,754 | 2,178 | 2,602 | 2,290 | 2,382 | 3,034 | 3,148 |
| Marine cargo handling | Establishments | 8 | 9 | 9 | 13 | 13 | 12 | 13 | 5 | 8 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Navigational services to shipping | Establishments | 21 | 20 | 17 | 20 | 17 | 18 | 18 | 20 | 15 |
| | Employees | ds | ds | 183 | 200 | 189 | 144 | 152 | 176 | 81 |
| | Payroll | ds | ds | 11,331 | 11,808 | 10,154 | 9,577 | 9,592 | 12,219 | 6,534 |
| Port & harbor operations | Establishments | 0 | 0 | 2 | 1 | 1 | 3 | 3 | 10 | 5 |
| | Employees | NA | NA | ds | ds | ds | ds | ds | 90 | ds |
| | Payroll | NA | NA | ds | ds | ds | ds | ds | 6,512 | ds |
| Ship & boat building | Establishments | 43 | 41 | 40 | 41 | 35 | 34 | 34 | 33 | 32 |
| | Employees | 1,298 | 1,230 | 1,441 | 1,692 | 1,886 | 980 | 1,179 | 1,504 | 1,406 |
| | Payroll | 45,183 | 43,416 | 47,950 | 74,583 | 90,446 | 42,004 | 55,068 | 77,718 | 79,913 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not applicable.

Tables | Washington



Washington | Commercial Fisheries

2014 Economic Impacts of the Washington Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|-----------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 63,382 | 7,330,457 | 2,015,266 | 3,041,830 | 27,467 | 1,764,743 | 730,773 | 988,672 |
| Commercial Harvesters | 7,941 | 648,782 | 277,742 | 390,461 | 7,941 | 648,782 | 277,742 | 390,461 |
| Seafood Processors & Dealers | 15,720 | 1,489,810 | 559,551 | 740,480 | 3,020 | 286,201 | 107,493 | 142,251 |
| Importers | 13,800 | 3,796,022 | 608,385 | 1,157,194 | - | - | - | - |
| Seafood Wholesalers & Distributors | 2,608 | 334,095 | 111,935 | 152,717 | 967 | 123,943 | 41,526 | 56,655 |
| Retail | 23,313 | 1,061,747 | 457,653 | 600,978 | 15,539 | 705,817 | 304,012 | 399,306 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 193,317 | 217,030 | 216,119 | 232,841 | 227,773 | 255,332 | 329,785 | 275,585 | 365,450 | 326,248 |
| Finfish & Other | 50,145 | 68,201 | 59,386 | 68,213 | 61,115 | 81,902 | 98,627 | 91,409 | 98,385 | 88,178 |
| Shellfish | 143,172 | 148,829 | 156,733 | 164,628 | 166,658 | 173,430 | 231,159 | 184,177 | 267,066 | 238,070 |
| Key Species | | | | | | | | | | |
| Clams | 48,503 | 55,786 | 56,428 | 64,141 | 72,646 | 73,625 | 88,739 | 69,412 | 84,398 | 81,250 |
| Crab | 50,872 | 43,464 | 54,302 | 53,712 | 48,944 | 57,070 | 83,627 | 59,485 | 86,510 | 80,445 |
| Hake (Whiting) | 4,937 | 7,296 | 7,121 | 7,249 | 2,334 | 4,105 | 7,183 | 5,882 | 7,452 | 5,431 |
| Halibut | 6,512 | 8,303 | 8,842 | 7,525 | 4,879 | 5,764 | 6,740 | 6,122 | 4,929 | 6,984 |
| Mussels | 3,729 | 6,564 | 3,820 | 5,293 | 4,851 | 4,318 | 4,740 | 6,065 | 9,230 | 6,830 |
| Oysters | 33,697 | 38,302 | 37,437 | 34,794 | 34,993 | 30,370 | 43,021 | 37,576 | 75,744 | 47,234 |
| Sablefish | 7,395 | 8,307 | 6,608 | 7,312 | 8,796 | 9,402 | 12,378 | 7,578 | 4,902 | 7,194 |
| Salmon | 14,319 | 24,586 | 22,026 | 23,376 | 22,003 | 40,622 | 42,434 | 28,398 | 42,375 | 38,998 |
| Shrimp | 4,335 | 3,602 | 3,746 | 5,380 | 4,139 | 5,677 | 7,140 | 6,986 | 8,664 | 19,701 |
| Tuna, albacore | 10,643 | 15,176 | 10,439 | 17,225 | 16,390 | 14,575 | 22,253 | 28,440 | 24,745 | 21,177 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 213,502 | 241,606 | 194,449 | 173,176 | 163,937 | 189,486 | 210,282 | 213,578 | 273,796 | 191,142 |
| Finfish & Other | 156,902 | 191,717 | 151,762 | 128,208 | 120,452 | 142,608 | 158,113 | 173,506 | 206,511 | 125,566 |
| Shellfish | 56,600 | 49,889 | 42,687 | 44,968 | 43,485 | 46,878 | 52,169 | 40,072 | 67,285 | 65,576 |
| Key Species | | | | | | | | | | |
| Clams | 3,621 | 4,617 | 3,363 | 4,070 | 4,266 | 3,876 | 4,023 | 3,664 | 3,975 | 4,305 |
| Crab | 32,086 | 24,619 | 22,487 | 21,355 | 20,651 | 22,500 | 27,072 | 16,590 | 28,043 | 19,322 |
| Hake (Whiting) | 93,654 | 120,058 | 91,272 | 67,159 | 36,378 | 58,900 | 73,494 | 38,524 | 58,696 | 49,654 |
| Halibut | 1,948 | 2,451 | 2,428 | 2,055 | 1,731 | 1,371 | 1,301 | 1,295 | 1,065 | 1,284 |
| Mussels | 504 | 774 | 475 | 593 | 568 | 589 | 547 | 559 | 731 | 579 |
| Oysters | 12,190 | 12,306 | 11,189 | 10,258 | 9,386 | 8,650 | 9,389 | 8,143 | 19,587 | 9,231 |
| Sablefish | 4,240 | 4,259 | 3,035 | 2,954 | 3,514 | 3,277 | 3,410 | 2,916 | 2,003 | 2,335 |
| Salmon | 17,926 | 26,570 | 21,938 | 17,641 | 31,821 | 28,086 | 38,706 | 19,839 | 49,049 | 28,140 |
| Shrimp | 7,279 | 6,926 | 4,455 | 7,355 | 7,775 | 10,153 | 10,193 | 10,009 | 14,259 | 31,441 |
| Tuna, albacore | 10,505 | 19,133 | 13,129 | 14,801 | 16,112 | 13,148 | 13,209 | 19,275 | 17,552 | 18,039 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Clams | 13.40 | 12.08 | 16.78 | 15.76 | 17.03 | 19.00 | 22.06 | 18.95 | 21.23 | 18.87 |
| Crab | 1.59 | 1.77 | 2.41 | 2.52 | 2.37 | 2.54 | 3.09 | 3.59 | 3.08 | 4.16 |
| Hake (Whiting) | 0.05 | 0.06 | 0.08 | 0.11 | 0.06 | 0.07 | 0.10 | 0.15 | 0.13 | 0.11 |
| Halibut | 3.34 | 3.39 | 3.64 | 3.66 | 2.82 | 4.20 | 5.18 | 4.73 | 4.63 | 5.44 |
| Mussels | 7.40 | 8.48 | 8.05 | 8.93 | 8.54 | 7.33 | 8.66 | 10.85 | 12.62 | 11.79 |
| Oysters | 2.76 | 3.11 | 3.35 | 3.39 | 3.73 | 3.51 | 4.58 | 4.61 | 3.87 | 5.12 |
| Sablefish | 1.74 | 1.95 | 2.18 | 2.48 | 2.50 | 2.87 | 3.63 | 2.60 | 2.45 | 3.08 |
| Salmon | 0.80 | 0.93 | 1.00 | 1.33 | 0.69 | 1.45 | 1.10 | 1.43 | 0.86 | 1.39 |
| Shrimp | 0.60 | 0.52 | 0.84 | 0.73 | 0.53 | 0.56 | 0.70 | 0.70 | 0.61 | 0.63 |
| Tuna, albacore | 1.01 | 0.79 | 0.80 | 1.16 | 1.02 | 1.11 | 1.68 | 1.48 | 1.41 | 1.17 |

2014 Economic Impacts of Washington Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|---------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 372 | 48,497 | 21,452 | 31,024 |
| | Private Boat | 792 | 117,045 | 37,838 | 69,818 |
| | Shore | 205 | 26,899 | 9,075 | 16,078 |
| Total Durable Expenditures | | 4,811 | 497,984 | 219,552 | 360,641 |
| Total State Economic Impacts | | 6,180 | 690,425 | 287,917 | 477,561 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 68,833 |
| For-Hire | 4,965 | 23,868 | Other Equipment | 34,556 |
| Private Boat | 2,644 | 90,323 | Boat Expenses | 358,756 |
| Shore | 718 | 21,098 | Vehicle Expenses | 32,727 |
| Total | 8,327 | 135,290 | Second Home Expenses | 0 |
| Total Durable Expenditures | | | | 494,871 |
| Total State Trip and Durable Goods Expenditures | | | | 638,488 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 201 | 184 | 220 | 167 | 163 | 162 | 274 | 176 | 189 | 231 |
| Non-Coastal | 23 | 21 | 23 | 19 | 20 | 19 | 30 | 24 | 26 | 24 |
| Out-of-State | 18 | 17 | 19 | 15 | 16 | 15 | 17 | 19 | 20 | 19 |
| Total Anglers | 242 | 222 | 262 | 201 | 199 | 196 | 321 | 219 | 235 | 274 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|------|------|------|-------|-------|-------|-------|
| For-Hire | 62 | 57 | 55 | 42 | 51 | 47 | 42 | 46 | 52 | 86 |
| Private | 565 | 492 | 661 | 428 | 399 | 399 | 607 | 618 | 701 | 701 |
| Shore | 513 | 513 | 513 | 513 | 513 | 513 | 513 | 513 | 513 | 513 |
| Total Trips | 1,140 | 1,062 | 1,229 | 983 | 963 | 959 | 1,162 | 1,177 | 1,266 | 1,300 |

Harvest (H) & Release (R) of Key Species Species Groups (thousands of fish)^{1,4}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Flatfishes | H | 61 | 63 | 51 | 47 | 54 | 50 | 51 | 52 | 53 | 55 |
| | R | 41 | 42 | 40 | 40 | 47 | 41 | 41 | 41 | 42 | 42 |
| Rockfishes ² | H | 307 | 282 | 260 | 216 | 245 | 208 | 235 | 259 | 275 | 304 |
| | R | 33 | 23 | 19 | 16 | 33 | 26 | 22 | 22 | 25 | 30 |
| Greenlings | H | 39 | 33 | 28 | 29 | 34 | 30 | 42 | 43 | 40 | 42 |
| | R | 25 | 22 | 19 | 19 | 39 | 22 | 29 | 23 | 16 | 15 |
| Sculpins | H | 17 | 16 | 15 | 15 | 16 | 16 | 17 | 16 | 16 | 16 |
| | R | 91 | 91 | 91 | 91 | 91 | 91 | 91 | 91 | 91 | 91 |
| Sturgeon ³ | H | 8 | 7 | 8 | 8 | 9 | NA | NA | NA | NA | NA |
| | R | 30 | 21 | 18 | 12 | 17 | NA | NA | NA | NA | NA |
| Surfperches | H | 133 | 133 | 133 | 133 | 133 | 133 | 133 | 134 | 134 | 134 |
| | R | 120 | 120 | 120 | 120 | 121 | 121 | 121 | 121 | 121 | 121 |
| Albacore tuna | H | 12 | 24 | 25 | 22 | 24 | 32 | 16 | 51 | 55 | 75 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 17 | 0 |
| Smelt & herring | H | 2,486 | 2,486 | 2,486 | 2,486 | 2,486 | 2,486 | 2,486 | 2,486 | 2,486 | 2,486 |
| | R | 126 | 126 | 126 | 126 | 126 | 126 | 126 | 126 | 126 | 126 |
| Sharks & Skates | H | 1 | 1 | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| | R | 12 | 14 | 9 | 12 | 10 | 3 | 1 | 3 | 2 | 4 |
| Salmon ³ | H | 246 | 109 | 334 | 90 | 716 | 124 | 310 | 309 | 390 | NA |
| | R | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.² This species may not be equivalent to species with similar names listed in the commercial tables³ Data on sturgeon harvest not available for 2010-2013; Salmon harvest estimates exclude release mortality.⁴ NA = not available.

Washington's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 175,658 (2.3%) | 2,316,296 (2%) | 94.93 (2.1%) | 156.15 (2.2%) | 296.73 (2.3%) | 14 |
| 2013 | 176,815 (2.4%) | 2,444,098 (2.1%) | 130.76 (2.3%) | 214.39 (2.4%) | 407.16 (2.4%) | 12.13 |
| %Change | 0.7 | 5.2 | 27.4 | 27.2 | 27.1 | -13.4 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 54 | 53 | 63 | 44 | 47 | 39 | 37 | 42 | 42 |
| | Receipts | 5,568 | 4,149 | 4,698 | 5,167 | 5,022 | 4,228 | 3,859 | 4,377 | 4,094 |
| Seafood sales, retail | Firms | 31 | 29 | 32 | 33 | 42 | 30 | 34 | 42 | 41 |
| | Receipts | 1,836 | 1,727 | 1,458 | 1,807 | 2,462 | 1,273 | 2,370 | 1,871 | 3,017 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Seafood product prep. & packaging | Establishments | 98 | 96 | 98 | 96 | 86 | 93 | 90 | 90 | 86 |
| | Employees | 5,743 | 5,705 | 5,249 | 5,893 | 4,860 | 5,296 | 5,387 | 6,118 | 6,224 |
| | Payroll | 239,962 | 255,129 | 275,662 | 306,213 | 232,543 | 254,592 | 293,112 | 326,827 | 315,379 |
| Seafood sales, wholesale | Establishments | 126 | 115 | 127 | 107 | 108 | 105 | 107 | 101 | 116 |
| | Employees | 1,094 | 1,015 | 1,086 | 996 | 1,103 | 970 | 911 | 1,085 | 999 |
| | Payroll | 42,852 | 42,934 | 46,085 | 48,251 | 48,044 | 45,871 | 45,543 | 51,508 | 49,683 |
| Seafood sales, retail | Establishments | 47 | 49 | 50 | 44 | 43 | 47 | 44 | 40 | 35 |
| | Employees | 291 | 292 | 244 | 247 | 239 | 282 | 253 | 256 | 266 |
| | Payroll | 9,322 | 8,998 | 8,001 | 7,947 | 8,324 | 9,098 | 7,786 | 8,210 | 9,069 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 41 | 43 | 37 | 24 | 24 | 30 | 28 | 28 | 35 |
| | Employees | 1,672 | 2,353 | 1,903 | 2,222 | 2,245 | 1,731 | 1,684 | 1,557 | 2,186 |
| | Payroll | 122,000 | 145,144 | 136,543 | 168,832 | 168,783 | 130,398 | 132,068 | 126,401 | 170,003 |
| Deep sea freight transportation | Establishments | 24 | 23 | 30 | 21 | 25 | 20 | 14 | 12 | 8 |
| | Employees | 378 | 197 | 227 | 263 | 305 | 209 | ds | ds | 200 |
| | Payroll | 22,655 | 14,390 | 19,692 | 24,843 | 28,897 | 24,711 | ds | 14,014 | 14,892 |
| Deep sea passenger transportation | Establishments | 3 | 3 | 3 | 4 | 5 | 4 | 2 | 2 | 5 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 96 | 103 | 114 | 116 | 110 | 117 | 114 | 100 | 110 |
| | Employees | 442 | 466 | 485 | 573 | 570 | 560 | 517 | 479 | 529 |
| | Payroll | 13,556 | 14,269 | 15,623 | 18,931 | 18,811 | 18,783 | 18,364 | 18,038 | 18,914 |
| Marine cargo handling | Establishments | 30 | 29 | 28 | 25 | 27 | 26 | 32 | 13 | 30 |
| | Employees | 4,459 | 3,764 | 4,913 | 4,821 | 2,953 | ds | 3,910 | ds | ds |
| | Payroll | 318,873 | 303,375 | 334,601 | 334,193 | 239,490 | ds | 323,286 | ds | ds |
| Navigational services to shipping | Establishments | 53 | 56 | 61 | 76 | 69 | 79 | 78 | 72 | 73 |
| | Employees | 841 | 942 | 950 | 1,213 | 1,168 | 1,225 | 1,207 | ds | ds |
| | Payroll | 60,034 | 72,120 | 72,912 | 100,542 | 102,934 | 102,766 | 94,781 | ds | ds |
| Port & harbor operations | Establishments | 6 | 5 | 6 | 11 | 11 | 9 | 9 | 48 | 28 |
| | Employees | ds | 53 | 129 | 111 | 118 | 74 | 75 | 1,509 | 181 |
| | Payroll | ds | 3,436 | 4,631 | 6,359 | 6,437 | 4,662 | 4,937 | 85,042 | 11,894 |
| Ship & boat building | Establishments | 154 | 164 | 167 | 169 | 162 | 152 | 135 | 141 | 138 |
| | Employees | 7,154 | 7,669 | 7,742 | 8,067 | 6,710 | 5,406 | 5,232 | 5,294 | 5,387 |
| | Payroll | 307,735 | 313,230 | 354,084 | 402,253 | 312,240 | 284,759 | 276,402 | 290,400 | 273,825 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

Western Pacific Region

- Hawai'i



Fish auction, Honolulu, Hawai'i
(photo credit: Min-Yang Lee)

MANAGEMENT CONTEXT

The U.S. Pacific Islands Region includes the State of Hawai'i, the Territories of American Samoa, Guam, the Commonwealth of the Northern Mariana Islands (CNMI), and the Pacific Remote Island Areas. Federal fisheries in this region are managed by the Western Pacific Fishery Management Council (WPFMC) and NOAA Fisheries under five fishery ecosystem plans (FEPs). These plans focus on place-based rather than species- or fishery-based management.

Western Pacific Fishery Ecosystem Plans

1. American Samoa
2. Hawai'i
3. Mariana Archipelago (Guam and the CNMI)
4. Pacific Remote Island Areas
5. Western Pacific Pelagics

Because fishery data are limited in most of these areas, information for the Hawai'i and Western Pacific Pelagics fisheries only is reported here. No catch share programs operate in this region.

Hawai'i FEP: NOAA Fisheries, WPFMC and the State of Hawai'i collaborate to manage fisheries across the Hawai'i Archipelago. The major fisheries in Hawai'i include trolling for pelagic species such as tuna, marlin, wahoo and mahimahi; deepwater hook-and-line bottom fishing; and various forms of net fishing that target nearshore pelagic and reef fish species. Under this FEP, the Hancock Seamount groundfish complex is currently overfished. This fishery has been closed since 1986.

Western Pacific Pelagics FEP: The management species covered under this FEP include tunas, billfishes, sharks, squids, and an assortment of other species. These species include mahimahi, wahoo, moonfish and pomfret caught by the Hawai'i longline fishery and smaller boats that utilize diverse gears including trolling, handline and traditional fishing methods. Of these species, bigeye tuna, Pacific bluefin tuna and the Central Western Pacific striped marlin stock are considered subject to overfishing. The Central Western Pacific striped marlin stock is also listed as overfished.

In addition to management by the WPFMC and NOAA Fisheries, pelagic fish, such as bigeye and yellowfin tunas, are managed by two regional fishery management organizations (RFMOs). The Western and Central Pacific Fishery Commission have authority to manage pelagic fisheries in the Western and Central Pacific Ocean, while the Inter-American Tropical Tuna Commission (IATTC) manages pelagic fisheries in the Eastern Pacific Ocean. Fish species and fisheries under the purview of both RFMOs migrate across national boundaries and between RFMO areas, requiring coordinated management. Since 2009, the annual bigeye tuna catch limit has been recommended by the WCPFC and implemented by NOAA Fisheries for the U.S. longline fleet in the Western and Central Pacific. The IATTC establishes the harvest limit for bigeye tuna for U.S. longline vessels longer than 24 meters in the Eastern Tropical Pacific.

POLICY UPDATES

On July 28, 2015, NOAA Fisheries announced that the U.S. pelagic longline vessels fishing in the Western and Central Pacific Ocean (WCPO) for bigeye tuna would no longer be able to retain and land bigeye tuna from August 5, 2015 through the end of the year. This restriction came about because the fishery reached the U.S. longline bigeye catch limit of 3,502 metric tons established by the WCPFC in 2014. The pelagic longline fleet based in Hawai'i accounts for most of the U.S. longline catch of bigeye tuna in the WCPO. Longline limits are among a suite of measures adopted by the WCPFC for the conservation and management of WCPO bigeye. Over-exploitation of bigeye has developed during the past 30 years with increasing catches of juveniles by purse-seine vessels as well as the catch of adults by longline vessels.

COMMERCIAL FISHERIES

Fishermen in Hawai'i earned \$101 million from their commercial harvest in 2014 and landed more than 33 million pounds of finfish and shellfish. Tunas, a high-value species group, made up 73 percent of the landings revenue and 61 percent of the landed weight.

Economic Impacts

In this report¹, the U.S. seafood industry includes the commercial harvest sector; seafood processors and dealers; seafood wholesalers and distributors; import-

ers; and seafood retailers.¹ In 2014, Hawai'i's seafood industry generated \$743 million in sales impacts, \$231 million in income impacts, \$336 million in value-added impacts, and approximately 10,000 full and part-time jobs. The retail sector contributed the most to job impacts (3,924 jobs), income impacts (\$86 million), and value-added impacts (\$112 million), while importers contributed the most to sales (\$273 million). The commercial harvest sector generated 3,551 jobs, \$176 million in sales, \$64 million in income, and \$93 million in value-added impacts.

Key Western Pacific Commercial Species

- Lobsters
- Mahimahi
- Marlin
- Moonfish
- Pomfret
- Scad
- Snappers
- Swordfish
- Tunas
- Wahoo

Landings Revenue

In 2014, landings revenue for finfish and shellfish totaled \$101 million, a 43 percent increase (21% in real terms) from total revenue earned in 2005. Landings revenue trends for this same period can be understood only after considering the growth of the tuna fishery. Hawai'i accounted for 54 percent of all tuna landings revenue in the U.S. in 2014, earning \$74 million for its catch. From 2005 to 2014, tuna revenue increased \$28 million, increasing 60 percent (36% in real terms). Bigeye tuna dominated Hawai'i's landings revenue in 2014 at \$61 million, an increase of \$25 million from 2005. Bigeye tuna accounted for at least 50 percent of Hawai'i's landings revenue each year from 2005 to 2014.

Landings

In 2014, Hawaiian commercial fishermen landed 33 million pounds of finfish and shellfish, a 19 percent increase from 2005 and a 3 percent increase from 2013. Finfish and other catch accounted for nearly 100 percent of total 2014 landings. Tunas contributed more to the Western Pacific's total landings than any other species or group with 20 million pounds landed in 2014. The largest landings increases between 2005 and 2014 were for pomfret (92%), moonfish (85%) and wahoo (29%). Swordfish (-28%), snappers (-15%) and scad (-11%) had the largest landings declines during this period.

Commercial Fisheries Facts

Landings revenue

- Between 2005 and 2014, the annual landings revenue from the key species or species groups averaged \$84 million, which accounted for 97 percent of total landings revenue generated in Hawai'i.
- Tunas contributed more than any other species or species group (73%), averaging \$62 million in landings revenue from 2005 to 2014.

Landings

- Key species or species groups contributed an average of 94 percent annually to total landings between 2005 and 2014.
- Tunas contributed the most to landings in the Region (64%), averaging 18 million pounds from 2005 to 2014.

Prices

- Lobsters had the highest average annual ex-vessel price per pound (\$11.25) over the time period, followed by snappers (\$5.04), and tunas (\$3.42).
- Marlin had the lowest average annual ex-vessel price per pound (\$1.36) over the time period, followed by moonfish (\$1.65), and swordfish (\$2.27).

Prices

Overall, the 2014 ex-vessel price for five of the key species or species groups were above their 10-year average annual price (four species in real terms). Prices for scad (52%), snappers (31%) and tunas (27%) increased the most from 2005 to 2014. Species or species groups with price declines from 2005 to 2014 included moonfish (-17%), pomfret (-11%) and lobsters (-7%).

RECREATIONAL FISHERIES

Recreational anglers who fished in the state of Hawai'i took 1.4 million fishing trips in 2014. Of these trips, 76 percent were shore-based trips. Scads (bigeye and mackerel) was the most caught species group with approximately 898,000 fish caught in 2014. Note that data on angler participation in Hawai'i is unavailable from 2007 through 2014.

Economic Impacts and Expenditures

The contribution of recreational fishing activities to the state economy are reported in terms of economic impacts (employment, sales, income and value-added impacts) and expenditures on fishing trips in the state

¹ 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).

of Hawai'i.² Employment impacts totaled 1,061 full- and part-time jobs generated by recreational fishing activities in the state. Sales impacts from recreational fishing trips totaled \$127 million; income impacts totaled \$44 million; and value-added impacts totaled \$70 million.

Durable goods and fishing-related equipment expenditures by recreational anglers were not available for Hawai'i for 2014. Expenditures for fishing trips across Hawai'i in 2014 totaled \$103.2 million. The greatest trip expenditures were by residents in the shore sector (\$42.1 million).

Key Western Pacific Recreational Species

- Blue marlin
- Dolphinfish
- Goatfishes
- Trevallies and other jacks
- Bigeye and mackerel scad
- Skipjack tuna
- Smallmouth bonafish
- Snappers
- Wahoo
- Yellowfin tuna

Fishing Trips

Anglers who fished in Hawai'i took approximately 1.4 million fishing trips in 2014, a 44 percent decrease from the total fishing trips taken in 2005. From 2013 to 2014, there was a 9 percent decrease in the number of trips taken. Information on for-hire fishing trips is not available.

Recreational Fishing Facts

Fishing trips

- In the Western Pacific, an average of 2.1 million fishing trips were taken annually from 2005 to 2014.
- Shore-based fishing trips accounted for 79 percent of these fishing trips.

Harvest and release

- The bigeye and mackerel scad species group was the most commonly caught key species or species group, averaging 804,400 fish caught over the 10-year period.
- All 10 commonly caught key species or species groups were harvested more of 10 than released during this period.

Harvest and Release

Of Hawai'i's key species and species groups, scads (bigeye and mackerel, 898,000 fish), goatfishes (480,000 fish) and jacks (trevallies and other jacks, 413,000 fish) were most frequently caught by recreational fishermen.

Of Hawai'i's key species or groups, the following experienced the largest increases in catch totals from 2005 to 2014: smallmouth bonafish (36%), goatfishes (28%) and scads (bigeye and mackerel, 21%). During the same period, the largest decreases were experienced by blue marlin (-89%), dolphinfish (mahimahi, -49%), and skipjack tuna (-34%).

Between 2013 and 2014, the largest year-over-year increase in catch occurred among jacks (trevallies and other jacks, 56%), smallmouth bonafish (53%), and yellowfin tuna (47%). Large percentage decreases in catch over the same period occurred among blue marlin (-50%) and skipjack tuna (-48%).

MARINE ECONOMY

Across the entire economy of Hawai'i³, 503,000 full- and part-time employees were employed by 32,000 establishments in 2013. Annual payroll totaled almost \$20 billion, employee compensation totaled about \$41 billion, and gross state product totaled \$75 billion. Hawai'i's level of commercial fishing-related employment continues to be well above the national baseline.⁴

The Commercial Fishing Location Quotient (CFLQ) measures the proportional size of this sector in a state's economy relative to the size of the commercial fishing sector in the national economy.⁵ 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 U.S. CFLQ is 1. If a state CLFQ is less than 1, then less commercial fishing occurs in this state than the national average. If a state CLFQ is greater than 1, then more commercial fishing occurs in this state than the national average.

The (CFLQ) for Hawai'i was 4.44 in 2013. This figure suggests that the level of employment in commercial

² Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/Marine-Angler-Durable-Expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

³ Unless otherwise stated, data is from the U.S. Census Bureau, <http://censtats.census.gov/> (accessed September 15, 2014).

⁴ 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).

fishing-related industries in this state is approximately 4.44 times higher than the level of employment in this industry nationwide.

For this report, the marine economy, a subset of the regional economy, consists of two industry sectors: 1) seafood sales and processing, which includes both employer establishments and non-employer 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 consist 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

From 2005 to 2013, the number of non-employer firms (businesses that have no paid employees and are subject to federal income tax) engaged in seafood product preparation and packaging in Hawai'i increased 220 percent to 16 firms. Annual receipts increased 101 percent to about \$821,000 (54% in real terms). Two employer establishments were engaged in seafood product preparation and packaging in 2013. Data on the number of employees and payroll was suppressed for confidentiality purposes for this sector in 2013.

Employer establishments in Hawai'i's wholesale seafood sales sector (32) remained unchanged from 2005 to 2013. The number of employees increased 12 percent to 542 in 2013. Annual payroll increased 32 percent to \$20 million (a 2% increase in real terms).

The number of non-employer firms in the seafood retail sales sector in Hawai'i increased 38 percent to 40 firms in 2013. Annual receipts increased 8 percent to about \$3.8 million in 2013 (a 17% decrease in real terms).

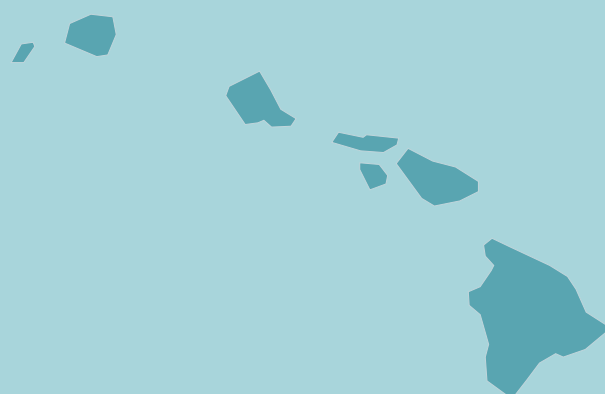
From 2005 to 2013, employer establishments in the seafood retail sales sector decreased 14 percent to 25; the number of employees decreased 2 percent to 318; and annual payroll increased 47 percent to \$7.4 million (a 13% increase in real terms).

Transport, Support and Marine Operations

Data were largely suppressed for confidentiality purposes for the transport, support and marine operations sector in Hawai'i.

⁵ U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

Tables | Hawai‘i



2014 Economic Impacts of the Hawai'i Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|---------|---------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 9,546 | 743,204 | 230,799 | 335,792 | 7,498 | 402,595 | 159,473 | 216,591 |
| Commercial Harvesters | 3,551 | 176,340 | 64,353 | 92,505 | 3,551 | 176,340 | 64,353 | 92,505 |
| Seafood Processors & Dealers | 559 | 48,565 | 19,224 | 24,794 | 411 | 35,771 | 14,160 | 18,262 |
| Importers | 992 | 272,922 | 43,741 | 83,199 | - | - | - | - |
| Seafood Wholesalers & Distributors | 520 | 48,890 | 17,147 | 22,810 | 311 | 29,310 | 10,280 | 13,675 |
| Retail | 3,924 | 196,488 | 86,335 | 112,484 | 3,224 | 161,174 | 70,680 | 92,149 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|---------|---------|---------|
| Total Revenue | 70,811 | 66,780 | 75,690 | 84,877 | 71,202 | 84,044 | 91,565 | 112,300 | 107,979 | 101,249 |
| Finfish & Other | 70,550 | 66,569 | 75,425 | 84,555 | 70,856 | 83,698 | 91,272 | 111,816 | 107,168 | 100,636 |
| Shellfish | 261 | 211 | 265 | 322 | 347 | 346 | 292 | 484 | 811 | 612 |
| Key Species | | | | | | | | | | |
| Lobsters | 111 | 60 | 93 | 120 | 136 | 117 | 104 | 98 | 95 | 105 |
| Mahimahi (dolphin) | 3,595 | 3,630 | 3,483 | 3,174 | 2,853 | 3,303 | 4,314 | 5,309 | 4,130 | 4,412 |
| Marlin | 2,512 | 2,581 | 2,028 | 2,072 | 2,142 | 1,756 | 2,375 | 2,888 | 2,802 | 3,197 |
| Moonfish (opah) | 1,897 | 1,906 | 2,171 | 2,198 | 2,409 | 2,591 | 2,853 | 3,163 | 3,203 | 2,910 |
| Pomfret | 1,440 | 1,328 | 1,461 | 1,662 | 1,381 | 1,549 | 1,449 | 2,097 | 2,576 | 2,466 |
| Scad | 835 | 999 | 1,094 | 889 | 1,198 | 1,251 | 964 | 1,181 | 1,147 | 1,128 |
| Snappers | 1,993 | 1,750 | 1,690 | 1,715 | 1,860 | 1,681 | 1,415 | 1,738 | 2,003 | 2,223 |
| Swordfish | 7,778 | 5,237 | 7,730 | 7,177 | 7,336 | 7,303 | 6,669 | 6,693 | 4,493 | 5,405 |
| Tunas | 46,102 | 44,630 | 51,171 | 60,863 | 47,710 | 59,775 | 66,628 | 83,298 | 81,819 | 73,657 |
| Wahoo | 2,251 | 2,330 | 2,085 | 2,225 | 1,673 | 1,746 | 1,806 | 2,330 | 2,375 | 2,800 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Landings | 28,139 | 26,021 | 28,934 | 30,652 | 26,906 | 28,069 | 29,289 | 31,048 | 32,447 | 33,474 |
| Finfish & Other | 28,092 | 25,983 | 28,890 | 30,599 | 26,849 | 28,006 | 29,240 | 30,968 | 32,343 | 33,386 |
| Shellfish | 47 | 38 | 45 | 52 | 57 | 62 | 49 | 80 | 104 | 88 |
| Key Species | | | | | | | | | | |
| Lobsters | 10 | 6 | 8 | 10 | 11 | 9 | 10 | 8 | 9 | 10 |
| Mahimahi (dolphin) | 1,439 | 1,337 | 1,388 | 1,250 | 1,287 | 1,518 | 1,423 | 1,746 | 1,515 | 1,689 |
| Marlin | 2,190 | 2,477 | 1,375 | 1,952 | 1,677 | 1,221 | 1,826 | 1,459 | 1,935 | 2,318 |
| Moonfish (opah) | 1,086 | 1,093 | 1,226 | 1,313 | 1,884 | 1,824 | 1,564 | 1,549 | 2,072 | 2,004 |
| Pomfret | 646 | 584 | 593 | 671 | 627 | 593 | 427 | 731 | 1,142 | 1,243 |
| Scad | 402 | 432 | 461 | 318 | 405 | 460 | 323 | 383 | 361 | 356 |
| Snappers | 434 | 378 | 381 | 378 | 391 | 342 | 269 | 308 | 357 | 369 |
| Swordfish | 3,446 | 2,602 | 3,643 | 3,835 | 3,881 | 3,153 | 2,592 | 2,381 | 1,674 | 2,480 |
| Tunas | 16,130 | 14,799 | 17,594 | 18,295 | 14,594 | 16,706 | 18,519 | 20,147 | 20,900 | 20,296 |
| Wahoo | 817 | 893 | 715 | 849 | 605 | 600 | 564 | 652 | 744 | 1,056 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-------|------|-------|-------|-------|-------|-------|-------|-------|-------|
| Lobsters | 10.99 | 9.63 | 11.84 | 12.14 | 12.37 | 12.36 | 10.39 | 11.84 | 10.71 | 10.21 |
| Mahimahi (dolphin) | 2.5 | 2.71 | 2.51 | 2.54 | 2.22 | 2.18 | 3.03 | 3.04 | 2.73 | 2.61 |
| Marlin | 1.15 | 1.04 | 1.47 | 1.06 | 1.28 | 1.44 | 1.3 | 1.98 | 1.45 | 1.38 |
| Moonfish (opah) | 1.75 | 1.74 | 1.77 | 1.67 | 1.28 | 1.42 | 1.82 | 2.04 | 1.55 | 1.45 |
| Pomfret | 2.23 | 2.27 | 2.46 | 2.48 | 2.2 | 2.61 | 3.39 | 2.87 | 2.25 | 1.98 |
| Scad | 2.08 | 2.31 | 2.37 | 2.8 | 2.95 | 2.72 | 2.98 | 3.08 | 3.18 | 3.17 |
| Snappers | 4.59 | 4.62 | 4.44 | 4.54 | 4.76 | 4.92 | 5.26 | 5.65 | 5.6 | 6.03 |
| Swordfish | 2.26 | 2.01 | 2.12 | 1.87 | 1.89 | 2.32 | 2.57 | 2.81 | 2.68 | 2.18 |
| Tunas | 2.86 | 3.02 | 2.91 | 3.33 | 3.27 | 3.58 | 3.6 | 4.13 | 3.91 | 3.63 |
| Wahoo | 2.75 | 2.61 | 2.92 | 2.62 | 2.77 | 2.91 | 3.2 | 3.57 | 3.19 | 2.65 |

2014 Economic Impacts of Hawai'i Recreational Fishing Expenditures (thousands of dollars)¹

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|--------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 365 | 43,479 | 18,605 | 27,438 |
| | Private Boat | 243 | 35,205 | 10,045 | 17,506 |
| | Shore | 453 | 48,756 | 15,631 | 25,077 |
| Total Durable Expenditures | | NA | NA | NA | NA |
| Total State Economic Impacts | | 1,061 | 127,440 | 44,281 | 70,021 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)¹

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | NA |
| For-Hire | 26,366 | 2,126 | Other Equipment | NA |
| Private Boat | 425 | 31,873 | Boat Expenses | NA |
| Shore | 252 | 42,108 | Vehicle Expenses | NA |
| Total | 27,043 | 76,107 | Second Home Expenses | NA |
| | | | Total Durable Expenditures | NA |
| Total State Trip and Durable Goods Expenditures | | | | 103,150 |

Recreational Anglers by Residential Area (thousands of anglers)^{2, 3}

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 204 | 173 | | | | | | | | |
| Non-Coastal | 0 | 0 | | | | | | | | |
| Out-of-State | 166 | 224 | | | | | | | | |
| Total Anglers | 370 | 397 | | | | | | | | |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Private | 578 | 570 | 475 | 564 | 441 | 484 | 224 | 325 | 297 | 324 |
| Shore | 1,892 | 2,074 | 2,102 | 1,966 | 1,722 | 1,907 | 1,158 | 1,195 | 1,216 | 1,051 |
| Total Trips | 2,470 | 2,644 | 2,577 | 2,530 | 2,163 | 2,391 | 1,382 | 1,520 | 1,513 | 1,375 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)⁴

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|------|------|-------|------|-------|------|------|------|------|------|
| Blue marlin | H | 19 | 3 | 2 | 11 | 3 | 1 | 2 | 3 | 4 | 2 |
| | R | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Dolphinfish (mahimahi) | H | 178 | 220 | 137 | 184 | 103 | 164 | 63 | 163 | 94 | 92 |
| | R | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Goatfishes ⁵ | H | 366 | 783 | 267 | 458 | 686 | 235 | 141 | 149 | 826 | 458 |
| | R | 8 | 11 | 9 | 6 | 6 | 12 | 13 | 13 | 4 | 22 |
| Jacks (trevallies and other jacks) ⁶ | H | 251 | 209 | 169 | 197 | 122 | 139 | 98 | 108 | 139 | 151 |
| | R | 179 | 211 | 131 | 120 | 84 | 126 | 60 | 128 | 125 | 262 |
| Scads (bigeye and mackerel) | H | 726 | 811 | 1,089 | 402 | 1,102 | 841 | 662 | 608 | 889 | 898 |
| | R | 14 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 |
| Skipjack tuna | H | 302 | 201 | 228 | 568 | 230 | 288 | 125 | 197 | 380 | 199 |
| | R | 1 | 1 | 5 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| Smallmouth bonefish | H | 25 | 64 | 19 | 50 | 36 | 55 | 13 | 27 | 23 | 29 |
| | R | 11 | 2 | 13 | 4 | 2 | 13 | 2 | 8 | 9 | 20 |
| Snappers ⁷ | H | 161 | 125 | 84 | 114 | 124 | 295 | 88 | 138 | 128 | 184 |
| | R | 57 | 35 | 38 | 7 | 19 | 25 | 3 | 13 | 8 | 2 |
| Wahoo | H | 54 | 62 | 57 | 78 | 61 | 40 | 16 | 31 | 36 | 43 |
| | R | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Yellowfin tuna | H | 231 | 123 | 273 | 461 | 198 | 302 | 141 | 182 | 150 | 219 |
| | R | 10 | 1 | 2 | 0 | 1 | 1 | 0 | 0 | 0 | 1 |

¹ NA = not available.² Participation (number of anglers) data are not available for 2007 through 2014.³ Data is not available because all Hawai'i residents are considered coastal county residents.⁴ In this table, '0' = 0 - 999 thousand fish and '1' = 1,000 - 1,499 thousand fish.⁵ Goatfishes include yellowstripe, yellowfin, pflugers, bandtail, doublebar, diespot, whitesaddle, manybar, blue and 'Goatfish family/genus'.⁶ Trevallies & other jacks includes bluefin trevally, giant trevally, bigeye trevally, black trevally, African pompano, greater amberjack, island jack, and other species in the jack family.⁷ Snappers include bluestip, blacktail, ruby, longtailed, pink, VonSiebolds, Bingham, green jobfish, ironjaw and smalltooth jobfish.

Hawai'i's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|----------|-----------------|----------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 32,244 (0.4%) | 490,682 (0.4%) | 16.16 (0.4%) | 32.10 (0.5%) | 58.12 (0.4%) | 4.91 |
| 2013 | 31,622 (0.4%) | 502,530 (0.4%) | 19.88 (0.4%) | 40.95 (0.5%) | 75.09 (0.5%) | 4.44 |
| % Change | -2.0 | 2.4 | 18.7 | 21.6 | 22.6 | -9.6 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product | Firms | 5 | 11 | 10 | 9 | 7 | 11 | 14 | 14 | 16 |
| prep. & packaging | Receipts | 409 | 1,011 | 1,023 | 1,020 | 712 | 741 | 866 | 965 | 821 |
| Seafood sales, retail | Firms | 29 | 31 | 41 | 37 | 35 | 37 | 39 | 42 | 40 |
| | Receipts | 3,487 | 3,627 | 4,353 | 4,394 | 3,666 | 4,124 | 3,558 | 4,086 | 3,764 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product | Establishments | 3 | 3 | 1 | 1 | 1 | 1 | 1 | 2 | 2 |
| prep. & packaging | Employees | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Payroll | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Seafood sales, wholesale | Establishments | 32 | 33 | 36 | 37 | 38 | 37 | 40 | 33 | 32 |
| | Employees | 485 | 462 | 550 | 695 | 538 | 531 | 538 | 483 | 542 |
| | Payroll | 15,163 | 16,786 | 18,932 | 20,665 | 19,347 | 19,290 | 19,416 | 19,413 | 20,039 |
| Seafood sales, retail | Establishments | 29 | 27 | 25 | 25 | 25 | 24 | 25 | 24 | 25 |
| | Employees | 326 | 315 | 393 | 173 | 158 | 177 | 187 | 303 | 318 |
| | Payroll | 5,007 | 5,564 | 7,209 | 3,674 | 3,559 | 3,533 | 3,521 | 6,493 | 7,366 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|--------|--------|--------|---------|---------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 13 | 13 | 11 | 5 | 5 | 2 | 2 | 5 | 5 |
| | Employees | ds | 543 | 557 | 478 | 475 | ds | ds | 431 | ds |
| | Payroll | ds | 36,941 | 36,635 | 34,544 | 34,367 | ds | ds | 34,538 | ds |
| Deep sea freight transportation | Establishments | 0 | 0 | 0 | 1 | 0 | 1 | 1 | 2 | 1 |
| | Employees | NA | NA | NA | ds | NA | ds | ds | ds | ds |
| | Payroll | NA | NA | NA | ds | NA | ds | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 2 | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 10 | 9 | 11 | 9 | 10 | 13 | 13 | 9 | 11 |
| | Employees | 181 | 152 | 167 | 156 | 164 | 189 | 208 | 162 | 166 |
| | Payroll | 3,354 | 3,719 | 4,151 | 4,317 | 4,368 | 5,362 | 5,237 | 3,779 | 4,003 |
| Marine cargo handling | Establishments | 8 | 7 | 8 | 11 | 11 | 14 | 14 | 11 | 10 |
| | Employees | 694 | ds | 1,048 | 1,098 | 1,075 | 1,236 | 1,278 | 664 | 709 |
| | Payroll | 53,061 | ds | 87,770 | 89,104 | 87,833 | 109,059 | 109,134 | 54,309 | 61,651 |
| Navigational services to shipping | Establishments | 6 | 6 | 8 | 11 | 11 | 11 | 8 | 8 | 9 |
| | Employees | ds | ds | ds | 105 | 120 | 90 | 105 | 97 | 100 |
| | Payroll | ds | ds | 3,340 | 5,846 | 5,258 | 5,113 | 5,310 | 5,567 | 6,518 |
| Port & harbor operations | Establishments | 2 | 2 | 2 | 4 | 3 | 2 | 2 | 2 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | 3,218 | 2,031 | ds | ds | ds | ds |
| Ship & boat building | Establishments | 16 | 14 | 13 | 14 | 13 | 15 | 15 | 18 | 18 |
| | Employees | ds | 545 | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | 23,134 | ds | ds | ds | ds | ds | ds | ds |

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 NA = not applicable.

³ ds = these data are suppressed.

New England Region

- Connecticut
- Maine
- Massachusetts
- New Hampshire
- Rhode Island



Boats in a harbor, Stonington, Maine
(photo credit: Capt. Albert Theberge [ret.])

MANAGEMENT CONTEXT

The New England Region includes Connecticut, Maine, Massachusetts, New Hampshire and Rhode Island. Federal fisheries in this region are managed by the New England Fishery Management Council (NEFMC) and NOAA Fisheries under nine fishery management plans (FMPs). Two of these FMPs, Monkfish and Spiny Dogfish, are developed in conjunction with the Mid-Atlantic Fisheries Management Council (MAFMC). The MAFMC is the lead Council for the Spiny Dogfish FMP; the NEFMC is the lead for the Monkfish FMP.

New England Regional FMPs

1. Northeast multi-species
2. Sea scallops
3. Monkfish (with the MAFMC)
4. Atlantic herring
5. Small mesh multi-species
6. Spiny dogfish (with the MAFMC)
7. Red crab
8. Northeast skate complex
9. Atlantic salmon

Twelve of the stocks or stock complexes covered in these FMPs were listed as overfished in 2014: Atlantic cod (two stocks), Atlantic halibut, Atlantic salmon, Atlantic wolf-fish, ocean pout, thorny skate, windowpane flounder, winter flounder, witch flounder and yellowtail flounder (two stocks). Eight stocks or stock complexes are currently subject to overfishing: Atlantic cod (two stocks), windowpane flounder, witch flounder, yellowtail flounder (two stocks), thorny skate and winter skate. Haddock was removed from the overfishing list in 2014.

CATCH SHARE PROGRAMS

Two catch share programs operate in the New England Region: 1) Northeast Multi-species Sectors; and 2) Northeast General Category Atlantic Sea Scallop Individual Fishing Quota (IFQ) Program. Following is a description of these catch share programs and their performance.

Northeast Multi-species Sectors: This catch share program was developed between 2004 and 2006 and included two pilot sectors that operated with an allocation of Georges Bank cod. The program was expanded in 2010 to 17 sectors, and approximately 55 percent of

eligible limited-access permit holders joined a sector. At the same time, annual catch limits were implemented for the first time and sharply reduced the available quota for fishermen. The key performance indicators of this program show that compared with the Baseline period (the 3-year period prior to implementation), the following metrics decreased: 2013 quotas, landings, number of active vessels, and inflation-adjusted revenue for catch share species. On the other hand, inflation-adjusted revenue per vessel increased during this period.

The Northeast General Category Atlantic Sea Scallop IFQ Program: This catch share program began in 2010 with two primary objectives: 1) control capacity and mortality in the general category scallop fishery; and 2) allow for better and more timely integration of sea scallop assessment results in management. The key performance indicators of this program show that 2013 inflation-adjusted revenue and revenue per vessel increased. However, landings, quota and the number of active vessels decreased compared with the Baseline period.

POLICY UPDATES

In June 2015, NOAA Fisheries announced a lobster trap transfer program that applies to Area 2 (Southern New England waters primarily off Rhode Island and Southern Massachusetts), the Outer Cape Cod Area, and Area 3 (offshore fishery from Maine to North Carolina). This program allows qualified vessels to buy and/or sell individual traps up to a specified cap in these areas, giving lobster permit holders more flexibility. Federal lobster permit holders from other areas may also “buy in” to these areas by purchasing traps through this program. The new trap allocations will be effective for the start of the 2016 fishing year on May 2, 2016.

COMMERCIAL FISHERIES

In 2014, commercial fishermen in New England landed 643 million pounds of finfish and shellfish, earning \$1.2 billion in landings revenue. American lobster (\$564 million) and sea scallop (\$298 million) dominated landings revenue. These species commanded average region-wide ex-vessel prices of \$3.83 and \$12.68 per pound, respectively. Although making up 72 percent of landings revenue, they represented only 27 percent of New England landings.

Economic Impacts

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.¹ In 2014, the New England Region's seafood industry generated \$8 billion in sales impacts in Massachusetts, \$2.3 billion in sales impacts in Maine, \$1.6 billion in sales impacts in New Hampshire, \$1.1 billion in sales impacts in Rhode Island, and \$429 million in sales impacts in Connecticut. Massachusetts generated the largest impacts across the three other impact categories, generating 98,000 jobs, \$2 billion in income, and \$3.1 billion in value-added impacts. Maine generated the second highest economic impacts (41,000 jobs, \$756 million income and \$1.1 billion in value-added impacts).

Key New England Region Commercial Species

- American lobster
- Atlantic herring
- Atlantic mackerel
- Bluefin tuna
- Cod and haddock
- Flounders
- Goosefish
- Quahog clam
- Sea scallop
- Squid

The retail sector generated the greatest employment impacts by state, with 59,000 jobs in Massachusetts and 18,000 jobs in Maine. The harvest sector also generated 18,000 jobs in Maine. More sales impacts were generated by importers in Massachusetts than any other sector in any other state in the region at \$4.3 billion. The greatest value-added impacts were also generated by importers in Massachusetts (\$1.3 billion).

Landings Revenue

Landings revenue in the New England Region totaled \$1.2 billion in 2014. This was a 24 percent increase (a 5% increase in real terms after adjusting for inflation) from 2005 levels and a 3 percent increase from 2013. Landings revenue was highest in Maine (\$549 million), followed by Massachusetts (\$525 million). Shellfish landings revenue totaled \$1 billion in 2014, a 31 percent increase (an 11% increase in real terms) from 2005 and a 5 percent increase from 2013. Shellfish landings revenue was greatest in Maine (\$497 million) and Massachusetts (\$420 million). Finfish landings revenue totaled \$196 million, a 2 percent decrease (a 17% decrease in real terms) from 2005 to 2014 and a 4 percent decrease from 2013. Finfish revenue

was highest in Massachusetts (\$105 million).

American lobster and sea scallop had the highest landings revenue in the New England Region in 2014, with \$564 million and \$298 million, respectively. Together they accounted for 72 percent of total landings revenue in 2014. Between 2005 and 2014, the landings revenue of American lobster increased 38 percent (a 17% increase in real terms), while landings revenue of sea scallop increased 19 percent (a 1% increase in real terms). In both nominal and real terms (after adjusting for inflation), lobster revenues achieved a record high since reporting began in 1950 due to continued record-high landings and higher prices (up 23% in 2014 compared with 2013). The surge in lobster landings increases are largely driven by record high stock abundance and recruitment levels in the Gulf of Maine, which has made up roughly 85 percent of fishery landings in recent years. In contrast, landings revenue of sea scallop decreased 19 percent from 2013 to 2014 despite the fact that its price increased 11%.

Landings

Fishermen in the New England Region landed 643 million pounds of finfish and shellfish in 2014. This figure was a 6 percent decrease from 2005 and a 1 percent increase from 2013. Finfish landings accounted for 59 percent of total landings in the New England Region (378 million pounds) in 2014. From 2013 to 2014, finfish landings increased 6 percent, while shellfish landings decreased 4 percent from 2013 levels.

Atlantic herring had the highest annual landings (199 million pounds) in the New England Region in 2014. From 2005 to 2014, landings of lobster (71%), Atlantic mackerel (57%), and quahogs (48%) increased significantly. Species or species groups with large decreases in landings during this period included goosefish (-58%), cod and haddock (-50%), flounders (-50%), and sea scallop (-27%). The declines in cod and haddock landings were driven by a 77 percent reduction in the Gulf of Maine cod quota from 2012 levels that was intended to reduce harvest and protect spawning stock. These measures were deemed necessary following the 2014 stock assessment that found Gulf of Maine cod to be severely depleted at just 3 to 4 percent of a sustainable abundance level. Sea scallop landings declined over this

¹ 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).

10-year period primarily due to a 35 percent reduction in the catch limit that was implemented in 2012 to protect young sea scallops and prevent localized overfishing.

Commercial Fisheries Facts

Landings revenue

- On average, from 2005 to 2014 the key species or species groups accounted for 84 percent of total revenue, generating \$858 million annually in the New England Region.
- American lobster had higher landings revenues than any other species or species group, averaging \$387 million in landings revenue from 2005 to 2014.

Landings

- Key species or species groups contributed an average of 71 percent annually to total landings between 2005 to 2014, averaging 456 million pounds.
- Atlantic herring contributed the most to landings in the region, averaging 190 million pounds from 2005 to 2014.

Prices

- Sea scallop had the highest average annual ex-vessel price per pound from 2005 to 2014 (\$8.67).
- Atlantic herring had the lowest average annual ex-vessel price per pound from 2005 to 2014 (\$0.19).

Species or species groups with large increases in landings between 2013 and 2014 include squid (97%), bluefin tuna (86%), cod and haddock (68%), and Atlantic mackerel (43%). Cod and haddock landing gains were driven strictly by haddock, which increased 143 percent; 2014 cod landings increased 4 percent compared with 2013 levels.

Prices

The ex-vessel prices for New England's key species and species groups in 2014 were higher than their 10-year average only for five of the key species (three of the species in real terms). From 2005 to 2014, prices for sea scallop, the most highly valued among New England's key species/species group, had the largest ex-vessel price increase (62%, 38% in real terms), followed by Atlantic herring (56%, 27% in real terms), the lowest value species in the region. Compared with ex-vessel prices in 2013, Atlantic mackerel (32%) and American lobster (24%) had the

largest increases. The 24 percent gain in lobster ex-vessel prices has been attributed to the lobsters shedding their shells on a more predictable schedule (unlike 2012 when lobsters shed their shells early, leading to an excess of supply and depressed prices). This price increase is also attributable to dealer's success in building markets to absorb the increased supply of the past 3 years effectively.

RECREATIONAL FISHERIES

In 2014, almost 1.2 million recreational anglers took 6.7 million fishing trips in the New England Region. Residents of a New England coastal county made up 92 percent of these anglers. Of the total fishing trips taken, 48 percent were from the private boat sector and another 44 percent were from the shore sector. The most frequently caught species or species groups in New England included porgies (scup) and Atlantic mackerel.

Key New England Recreational Species

- | | |
|---------------------|-------------------|
| • Atlantic cod | • Scup |
| • Atlantic mackerel | • Striped bass |
| • Bluefin tuna | • Summer flounder |
| • Bluefish | • Winter flounder |
| • Little tunny | • Tautog |

Economic Impacts and Expenditures

The contribution of recreational fishing activities in the New England Region² are reported in terms of economic impacts at the state level (employment, sales, income and value-added impacts) and expenditures on fishing trips and durable equipment at the regional level. Employment impacts in Massachusetts were the highest in the region with approximately 14,264 full- and part-time jobs generated by recreational fishing activities in the state. Rhode Island (4,439 jobs) and Connecticut (2,993 jobs) followed in terms of employment impacts.

In addition to jobs, the contribution of recreational fishing activities to the New England Region's economy can be measured in terms of sales impacts and the contribution of these activities to gross domestic product (value-added impacts). In 2014, sales impacts were the highest in Massachusetts (\$1.4 billion), followed by Rhode Island (\$0.4 billion). Value added impacts were the highest in Massachusetts (\$1 billion in value-added impacts), followed by Rhode Island (\$0.3 billion).

² Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/Marine-Angler-Durable-Expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

The total saltwater fishing trip and durable equipment expenditures were \$2.2 across the New England Region in 2014. Approximately 82 percent of these expenditures were related to durable equipment purchases. The largest expenditures on durable goods were for boat expenses (\$1.1 billion), followed by fishing tackle (\$426.4 million), and other equipment (\$156.2 million). Fishing trip-related expenditures by non-residents totaled \$191.5 million, of which the greatest portion can be attributed to trips in the shore sector (\$89.9 million). Residents of the New England Region spent \$201.9 million on trip-related expenses, with the greatest of these expenses related to the private boat sector (\$118.7 million).

Participation

There were 1.2 million recreational anglers who fished in the New England Region in 2014, a 22 percent decrease from 2005 (1.5 million anglers). These anglers were New England Region residents from either a coastal (1.1 million anglers) or non-coastal county (98,000 anglers). About 92 percent of total anglers in 2014 were residents of a coastal county. Coastal county angler participation in 2014 decreased 20 percent compared with 2005 (1.3 million anglers) and increased 4 percent between 2013 and 2014. Non-coastal county angler participation decreased 42 percent from 2005 (169,000 anglers) and decreased 2 percent from 2013 (100,000 anglers).

Fishing Trips

Recreational fishermen took 6.7 million fishing trips in the New England Region in 2014. This was a 28 percent decrease from 2005 and a 6 percent increase from 2013. Approximately 48 percent of the saltwater trips came in the private boat sector. The other most popular mode of fishing was shore with 44 percent of trips in 2014.

Harvest and Release

The New England Region's species and species groups caught most frequently in 2014 were porgies (scup) (6.4 million fish), Atlantic mackerel (4.7 million fish), and bluefish (3.6 million fish). Between 2005 and 2014, five of the New England Region's key species or species groups showed decreases in catch totals, with the largest decreases occurring among striped bass (-70%), bluefin tuna (-60%) and Atlantic cod (-42%). Large increases

in the number of fish caught between 2005 and 2014 were observed in little tunny (693%), wrasses (tautog) (201%) and winter flounder (80%).

Recreational Fishing Facts

Participation

- An average of 1.4 million anglers fished in the New England Region annually from 2005 to 2014.
- Coastal county residents made up 89 percent of total anglers in this region from 2005 to 2014.

Fishing Trips

- In the New England Region, an average of 7.6 million fishing trips were taken annually from 2005 to 2014.
- Private or rental boat and shore-based fishing trips accounted for an annual average of 4 million and 3.2 million fishing trips, respectively, from 2005 to 2014.

Harvest and Release

- Striped bass was the most commonly caught key species or species group, averaging 6.3 million fish per year from 2005 to 2014, followed by porgies (scups) with 5.5 million fish.

MARINE ECONOMY

Across all sectors of the economy in the New England Region approximately 6 million full- and part-time workers were employed by approximately 366,000 establishments in 2013.³ Annual payroll totaled \$326 billion. Total employee compensation in the New England Region totaled \$487 billion and the combined gross state product of all states totaled about \$865 billion.⁴

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.⁵ 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 U.S. CFLQ is 1. If a state CFLQ is less than 1, then less commercial fishing occurs in this state than the national average. If a state CFLQ is greater than 1, then more commercial fishing occurs in this state than the national average.

³ Unless otherwise stated, data is from the U.S. Census Bureau, <http://censtats.census.gov/> (accessed September 15, 2014).

⁴ 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).

⁵ U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

CFLQ values were available only for two of the five states in the New England region, Maine and Rhode Island. Both states show a higher concentration of fishing-related industries than the national economy as a whole. In 2013, the CFLQ for Maine was the highest in the region at 18.29. Maine's CFLQ suggests that the level of employment in commercial fishing-related industries in this state is approximately 18.29 times higher than the level of employment in these industries nationwide. The 2013 CFLQ in Rhode Island was second highest in the region at 3.2.

Seafood Sales and Processing

From 2005 to 2013, the number of non-employer firms (businesses that have no paid employees and are subject to federal income tax) engaged in seafood product preparation and packaging in the New England Region increased 6 percent to 103 firms. The greatest number of these nonemployer firms were located in Maine (36). Annual receipts decreased 4 percent to about \$10 million in 2013 (a 26% decrease in real terms). Employer establishments engaged in seafood product preparation and packaging decreased 19 percent from 2005 to 2013, to 79 firms. The biggest number of New England Region employer firms in this sector was located in Massachusetts (40). The number of employees decreased 42 percent to 2,356. Annual payroll decreased 27 percent to about \$113 million in 2013 (a 44% decrease in real terms).

From 2005 to 2013, employer establishments in the wholesale seafood sales sector decreased 10 percent to 349. The largest number of wholesaling establishments was located in Maine (150). The number of employees increased 17 percent to 3,723. Annual payroll increased 48 percent to about \$172 million in 2013 (a 14% increase in real terms).

The number of non-employer firms in the retail seafood sector in the New England Region decreased 2 percent to 157 firms in 2013, relative to 2005. The greatest number of these non-employer firms was located in Massachusetts (51). Annual receipts decreased 29 percent to about \$14 million in 2013 (a 46% decrease in real terms). Employer establishments engaged in seafood retail decreased 5 percent from 2005 to 2013, to 234 firms. The biggest number of New England Region employer firms in this

sector was located in Massachusetts (114). The number of employees increased 5 percent to 1,327. Annual payroll increased 12 percent to about \$36 million in 2013 (a 14% decrease in real terms).

Transport, Support and Marine Operations

The size of the Transport, Support and Marine Operations sectors in the New England region is difficult to assess because so much of the state-level data is suppressed for confidentiality purposes. It is clear, however, that these sectors play an important role in the regional economy. For example, there were 493 establishments classified as marinas, employing 3,343 workers and spending \$168 million on payroll in 2013 across all five states in the region. In addition, the Ship and Boat Building Sector consisted of 167 establishments employing 1,231 workers and contributing \$58 million in payroll in Massachusetts and Rhode Island alone.

Tables | New England Region



New England Region | Commercial Fisheries

2014 Economic Impacts of the New England Seafood Industry (thousands of dollars)

| | Landings Revenue | With Imports | | | | Without Imports | | | |
|---------------|------------------|--------------|-----------|-----------|-------------|-----------------|-----------|---------|-------------|
| | | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Connecticut | 14,145 | 2,763 | 429,184 | 90,981 | 151,035 | 851 | 49,989 | 17,133 | 23,886 |
| Maine | 548,943 | 41,314 | 2,303,292 | 755,955 | 1,094,928 | 39,198 | 1,993,580 | 689,391 | 985,557 |
| Massachusetts | 525,124 | 97,761 | 7,954,047 | 2,045,415 | 3,132,490 | 59,347 | 2,210,111 | 811,881 | 1,107,546 |
| New Hampshire | 26,833 | 11,217 | 1,582,868 | 359,000 | 578,673 | 2,338 | 129,290 | 47,844 | 65,427 |
| Rhode Island | 86,211 | 10,174 | 1,096,821 | 273,316 | 428,503 | 5,370 | 305,502 | 110,683 | 154,995 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|-----------|---------|---------|---------|---------|-----------|-----------|-----------|-----------|
| Total Revenue | 970,516 | 1,132,841 | 895,381 | 808,816 | 787,206 | 960,090 | 1,103,010 | 1,192,900 | 1,163,328 | 1,201,257 |
| Finfish & Other | 200,751 | 329,541 | 178,614 | 190,211 | 176,889 | 190,224 | 212,523 | 243,964 | 204,722 | 196,224 |
| Shellfish | 769,765 | 803,300 | 716,768 | 618,605 | 610,317 | 769,867 | 890,487 | 948,937 | 958,606 | 1,005,032 |
| Key Species | | | | | | | | | | |
| American lobster | 408,719 | 395,289 | 359,783 | 317,909 | 305,195 | 397,768 | 417,931 | 425,562 | 458,779 | 563,616 |
| Atlantic herring | 20,085 | NA | 18,770 | 20,507 | 24,459 | 20,692 | 24,759 | 28,545 | 31,388 | 28,130 |
| Atlantic mackerel | 2,923 | 14,491 | 6,000 | 5,265 | 7,892 | 3,459 | 295 | 3,480 | 1,738 | 3,173 |
| Bluefin tuna | 3,864 | 1,715 | 2,077 | 2,993 | 4,448 | 8,470 | 9,258 | 8,394 | 3,649 | 6,114 |
| Cod & haddock | 39,824 | 31,856 | 39,326 | 47,166 | 38,745 | 49,710 | 48,775 | 29,972 | 16,350 | 20,805 |
| Flounders | 42,339 | 37,757 | 33,650 | 30,501 | 27,282 | 27,680 | 30,837 | 35,138 | 32,054 | 31,353 |
| Goosefish | 34,408 | 26,603 | 21,209 | 19,945 | 14,321 | 14,064 | 19,792 | 19,693 | 13,576 | 14,095 |
| Quahog clam | 6,707 | 28,356 | 30,026 | 8,901 | 9,002 | 9,713 | 8,314 | 9,276 | 9,383 | 10,147 |
| Sea scallop | 250,762 | 264,226 | 237,299 | 203,124 | 209,168 | 265,493 | 352,632 | 389,501 | 366,007 | 297,523 |
| Squid | 20,206 | 25,850 | 17,711 | 19,848 | 16,696 | 14,788 | 22,887 | 18,187 | 15,547 | 21,407 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 684,292 | 748,637 | 584,849 | 602,950 | 648,988 | 580,145 | 612,952 | 665,778 | 634,766 | 643,138 |
| Finfish & Other | 461,038 | 496,743 | 371,353 | 396,942 | 422,726 | 334,641 | 357,753 | 381,476 | 357,666 | 378,303 |
| Shellfish | 223,254 | 251,894 | 213,496 | 206,009 | 226,263 | 245,503 | 255,199 | 284,302 | 277,100 | 264,836 |
| Key Species | | | | | | | | | | |
| American lobster | 86,224 | 94,347 | 79,435 | 86,229 | 99,199 | 116,024 | 125,167 | 148,906 | 149,116 | 147,179 |
| Atlantic herring | 212,389 | 240,626 | 158,077 | 167,709 | 210,786 | 140,789 | 174,338 | 190,532 | 203,763 | 198,807 |
| Atlantic mackerel | 8,223 | 99,752 | 50,760 | 38,359 | 39,398 | 16,904 | 913 | 9,680 | 9,049 | 12,942 |
| Bluefin tuna | 837 | 274 | 300 | 447 | 772 | 1,201 | 1,085 | 915 | 523 | 971 |
| Cod & haddock | 30,500 | 19,785 | 24,856 | 33,122 | 32,470 | 39,261 | 30,108 | 14,800 | 9,072 | 15,199 |
| Flounders | 30,290 | 19,530 | 16,089 | 15,411 | 16,229 | 14,526 | 17,902 | 18,340 | 16,295 | 15,179 |
| Goosefish | 34,873 | 26,146 | 19,968 | 17,757 | 14,256 | 12,378 | 14,700 | 16,422 | 14,321 | 14,547 |
| Quahog clam | 1,088 | 6,195 | 4,630 | 1,468 | 1,628 | 1,790 | 1,513 | 1,570 | 1,594 | 1,607 |
| Sea scallop | 32,038 | 41,229 | 35,390 | 28,867 | 31,604 | 32,884 | 35,285 | 39,209 | 32,103 | 23,468 |
| Squid | 26,748 | 43,652 | 26,421 | 28,615 | 28,014 | 21,722 | 27,907 | 16,153 | 14,575 | 28,779 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|------|------|------|------|------|------|------|------|------|-------|
| American lobster | 4.74 | 4.19 | 4.53 | 3.69 | 3.08 | 3.43 | 3.34 | 2.86 | 3.08 | 3.83 |
| Atlantic herring | 0.09 | 0.68 | 0.12 | 0.12 | 0.12 | 0.15 | 0.14 | 0.15 | 0.15 | 0.14 |
| Atlantic mackerel | 0.36 | 0.15 | 0.12 | 0.14 | 0.20 | 0.20 | 0.32 | 0.36 | 0.19 | 0.25 |
| Bluefin tuna | 4.62 | 6.26 | 6.93 | 6.69 | 5.76 | 7.05 | 8.54 | 9.18 | 6.98 | 6.29 |
| Cod & haddock | 1.31 | 1.61 | 1.58 | 1.42 | 1.19 | 1.27 | 1.62 | 2.03 | 1.80 | 1.37 |
| Flounders | 1.40 | 1.93 | 2.09 | 1.98 | 1.68 | 1.91 | 1.72 | 1.92 | 1.97 | 2.07 |
| Goosefish | 0.99 | 1.02 | 1.06 | 1.12 | 1.00 | 1.14 | 1.35 | 1.20 | 0.95 | 0.97 |
| Quahog clam | 6.16 | 4.58 | 6.49 | 6.06 | 5.53 | 5.43 | 5.50 | 5.91 | 5.89 | 6.31 |
| Sea scallop | 7.83 | 6.41 | 6.71 | 7.04 | 6.62 | 8.07 | 9.99 | 9.93 | 11.4 | 12.68 |
| Squid | 0.76 | 0.59 | 0.67 | 0.69 | 0.60 | 0.68 | 0.82 | 1.13 | 1.07 | 0.74 |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of the New England Recreational Fishing Expenditures (thousands of dollars, trips)

| | Trips | #Jobs | Sales | Income | Value Added |
|---------------|-------|--------|-----------|---------|-------------|
| Connecticut | 1,364 | 2,993 | 289,927 | 137,757 | 215,821 |
| Maine | 539 | 1,051 | 84,955 | 35,676 | 55,515 |
| Massachusetts | 3,397 | 14,264 | 1,391,996 | 688,503 | 996,280 |
| New Hampshire | 252 | 563 | 52,693 | 25,375 | 35,185 |
| Rhode Island | 1,099 | 4,439 | 421,355 | 199,243 | 300,928 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 426,408 |
| For-Hire | 70,202 | 34,229 | Other Equipment | 156,233 |
| Private Boat | 31,426 | 118,676 | Boat Expenses | 1,109,629 |
| Shore | 89,881 | 48,945 | Vehicle Expenses | 149,153 |
| Total | 191,507 | 201,851 | Second Home Expenses | 2,418 |
| | | | Total Durable Expenditures | 1,843,841 |
| Total State Trip and Durable Goods Expenditures | | | | 2,237,199 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 1,348 | 1,408 | 1,408 | 1,389 | 1,222 | 1,317 | 1,156 | 1,172 | 1,043 | 1,080 |
| Non-Coastal | 169 | 188 | 205 | 187 | 165 | 168 | 132 | 145 | 100 | 98 |
| Out-of-State | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Total Anglers | 1,517 | 1,596 | 1,613 | 1,576 | 1,387 | 1,485 | 1,288 | 1,317 | 1,143 | 1,178 |

Recreational Fishing Effort by Mode (thousands of angler trips)

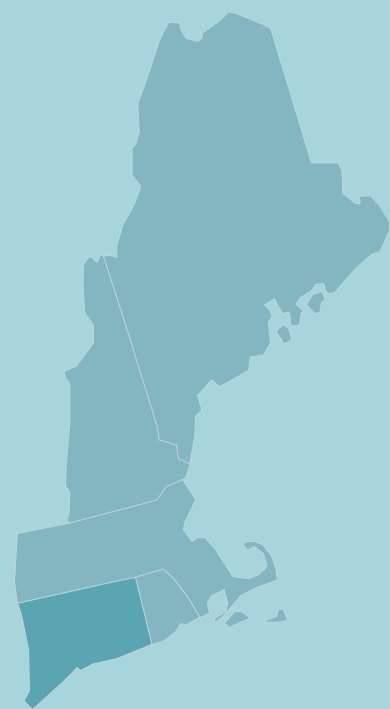
| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 418 | 457 | 518 | 511 | 463 | 321 | 367 | 345 | 516 | 486 |
| Private | 5,060 | 4,651 | 4,820 | 4,893 | 3,375 | 3,967 | 3,161 | 3,132 | 3,458 | 3,225 |
| Shore | 3,719 | 4,107 | 3,951 | 3,735 | 3,322 | 2,925 | 2,531 | 2,687 | 2,312 | 2,940 |
| Total Trips | 9,197 | 9,215 | 9,289 | 9,139 | 7,160 | 7,213 | 6,059 | 6,164 | 6,286 | 6,651 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|---|-------|--------|-------|-------|-------|-------|-------|-------|-------|-------|
| Atlantic cod | H | 485 | 203 | 305 | 384 | 390 | 509 | 532 | 336 | 392 | 264 |
| | R | 1,108 | 722 | 964 | 954 | 833 | 1,071 | 915 | 471 | 641 | 667 |
| Atlantic mackerel | H | 2,940 | 4,180 | 1,885 | 3,357 | 2,463 | 3,472 | 5,336 | 3,277 | 3,707 | 3,263 |
| | R | 62 | 559 | 116 | 453 | 344 | 381 | 536 | 484 | 279 | 1,421 |
| Bluefin tuna | H | 12 | 3 | 11 | 9 | 8 | 1 | 2 | 10 | 0 | 8 |
| | R | 8 | 7 | 10 | 1 | 5 | 0 | 5 | 4 | 0 | 0 |
| Bluefish | H | 1,200 | 1,647 | 1,512 | 1,460 | 673 | 1,184 | 658 | 1,502 | 1,685 | 873 |
| | R | 3,013 | 3,639 | 2,906 | 2,995 | 1,436 | 1,846 | 1,931 | 1,950 | 1,957 | 2,754 |
| Little tunny | H | 0 | 1 | 5 | 0 | 1 | 2 | 0 | 10 | 1 | 9 |
| | R | 55 | 26 | 65 | 16 | 17 | 20 | 44 | 103 | 14 | 427 |
| Porgies (scup) | H | 1,595 | 1,426 | 3,048 | 1,944 | 1,498 | 2,411 | 2,287 | 2,952 | 3,790 | 3,172 |
| | R | 2,194 | 2,638 | 2,802 | 4,048 | 3,277 | 3,586 | 2,376 | 3,530 | 3,084 | 3,263 |
| Striped bass | H | 700 | 593 | 597 | 602 | 548 | 527 | 458 | 531 | 701 | 495 |
| | R | 9,943 | 14,094 | 8,367 | 7,714 | 4,164 | 2,769 | 2,040 | 1,780 | 3,801 | 2,649 |
| Summer flounder | H | 589 | 642 | 426 | 584 | 167 | 198 | 267 | 242 | 429 | 418 |
| | R | 1,419 | 2,850 | 1,044 | 2,112 | 908 | 818 | 1,252 | 937 | 1,457 | 1,393 |
| Winter flounder | H | 43 | 50 | 52 | 180 | 113 | 104 | 100 | 55 | 43 | 97 |
| | R | 42 | 46 | 44 | 70 | 102 | 86 | 60 | 28 | 24 | 56 |
| Wrasses (tautog) | H | 269 | 362 | 569 | 304 | 197 | 358 | 79 | 323 | 291 | 459 |
| | R | 594 | 638 | 1,426 | 515 | 396 | 562 | 384 | 909 | 935 | 2,135 |

¹ NA = data are not available because out-of-state resident information is collected for individual states but does not specify whether an angler resides in a region.² In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Tables | Connecticut



2014 Economic Impacts of the Connecticut Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|---------|--------|-------------|-----------------|--------|--------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 2,763 | 429,184 | 90,981 | 151,035 | 851 | 49,989 | 17,133 | 23,886 |
| Commercial Harvesters | 425 | 25,083 | 6,880 | 10,600 | 425 | 25,083 | 6,880 | 10,600 |
| Seafood Processors & Dealers | 116 | 11,979 | 4,575 | 5,914 | 53 | 5,429 | 2,073 | 2,680 |
| Importers | 1,169 | 321,504 | 51,527 | 98,008 | - | - | - | - |
| Seafood Wholesalers & Distributors | 173 | 27,531 | 9,011 | 12,108 | 17 | 2,636 | 863 | 1,159 |
| Retail | 879 | 43,087 | 18,988 | 24,405 | 357 | 16,840 | 7,317 | 9,446 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 37,570 | 36,892 | 42,053 | 17,206 | 15,007 | 17,626 | 20,032 | 21,132 | 14,632 | 14,145 |
| Finfish & Other | 5,097 | 3,732 | 3,421 | 3,987 | 3,172 | 5,284 | 4,863 | 5,529 | 5,172 | 4,478 |
| Shellfish | 32,474 | 33,161 | 38,632 | 13,219 | 11,835 | 12,342 | 15,170 | 15,603 | 9,460 | 9,667 |
| Key Species | | | | | | | | | | |
| American lobster | 3,821 | 4,031 | 3,222 | 2,102 | 1,763 | 1,894 | 943 | 1,057 | 577 | 609 |
| Eastern oyster | NA | 2,206 | 5,142 | NA | NA | NA | NA | NA | NA | NA |
| Flounders | 1,170 | 1,027 | 881 | 802 | 736 | 889 | 1,027 | 996 | 1,086 | 1,009 |
| Goosefish | 658 | 346 | 512 | 551 | 591 | 564 | 976 | 1,040 | 1,022 | 510 |
| Hake | 2,432 | 1,628 | 1,232 | 1,619 | 1,149 | 1,417 | 1,705 | 1,468 | 1,416 | 1,692 |
| Quahog clam | NA | 18,135 | 20,531 | NA | NA | NA | NA | NA | NA | NA |
| Scups or Porgies | 263 | 302 | 311 | 383 | 196 | 272 | 408 | 837 | 705 | 573 |
| Sea scallop | 9,761 | 7,229 | 8,605 | 10,032 | 8,952 | 9,458 | 13,007 | 12,005 | 7,219 | 7,219 |
| Snails (conchs) | 233 | 533 | 312 | 35 | NA | NA | NA | NA | NA | NA |
| Squid, loligo | 1,224 | 954 | 744 | 546 | 260 | 473 | 694 | 1,861 | 1,257 | 1,354 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|-------|-------|-------|-------|-------|-------|-------|
| Total Landings | 13,628 | 11,750 | 10,050 | 7,131 | 6,568 | 6,698 | 7,403 | 8,940 | 7,957 | 7,523 |
| Finfish & Other | 6,548 | 5,807 | 3,931 | 4,552 | 4,248 | 4,485 | 5,282 | 5,823 | 5,926 | 5,277 |
| Shellfish | 7,080 | 5,943 | 6,119 | 2,578 | 2,320 | 2,213 | 2,121 | 3,117 | 2,030 | 2,246 |
| Key Species | | | | | | | | | | |
| American lobster | 714 | 793 | 569 | 426 | 412 | 442 | 199 | 248 | 127 | 127 |
| Eastern oyster | NA | 77 | 193 | NA | NA | NA | NA | NA | NA | NA |
| Flounders | 582 | 458 | 345 | 283 | 308 | 332 | 420 | 350 | 426 | 313 |
| Goosefish | 524 | 496 | 460 | 424 | 546 | 358 | 630 | 765 | 967 | 493 |
| Hake | 3,735 | 2,632 | 1,839 | 2,465 | 2,194 | 2,151 | 2,199 | 2,032 | 1,821 | 2,207 |
| Quahog clam | NA | 2,665 | 3,067 | NA | NA | NA | NA | NA | NA | NA |
| Scups or Porgies | 328 | 298 | 256 | 282 | 204 | 324 | 644 | 907 | 1,195 | 811 |
| Sea scallop | 1,272 | 1,104 | 1,313 | 1,407 | 1,386 | 1,260 | 1,318 | 1,231 | 640 | 609 |
| Snails (conchs) | 50 | 101 | 117 | 47 | NA | NA | NA | NA | NA | NA |
| Squid, loligo | 1,537 | 1,157 | 811 | 523 | 256 | 366 | 498 | 1,518 | 1,098 | 1,318 |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|------|-------|-------|------|------|------|------|------|-------|-------|
| American lobster | 5.35 | 5.08 | 5.67 | 4.93 | 4.27 | 4.29 | 4.74 | 4.26 | 4.53 | 4.78 |
| Eastern oyster | NA | 28.61 | 26.64 | NA | NA | NA | NA | NA | NA | NA |
| Flounders | 2.01 | 2.25 | 2.55 | 2.84 | 2.39 | 2.68 | 2.44 | 2.85 | 2.55 | 3.23 |
| Goosefish | 1.26 | 0.7 | 1.11 | 1.3 | 1.08 | 1.58 | 1.55 | 1.36 | 1.06 | 1.04 |
| Hake | 0.65 | 0.62 | 0.67 | 0.66 | 0.52 | 0.66 | 0.78 | 0.72 | 0.78 | 0.77 |
| Quahog clam | NA | 6.8 | 6.69 | NA | NA | NA | NA | NA | NA | NA |
| Scups or Porgies | 0.8 | 1.01 | 1.22 | 1.36 | 0.96 | 0.84 | 0.63 | 0.92 | 0.59 | 0.71 |
| Sea scallop | 7.67 | 6.55 | 6.55 | 7.13 | 6.46 | 7.51 | 9.87 | 9.75 | 11.29 | 11.85 |
| Snails (conchs) | 4.66 | 5.28 | 2.66 | 0.75 | NA | NA | NA | NA | NA | NA |
| Squid, loligo | 0.8 | 0.82 | 0.92 | 1.04 | 1.01 | 1.29 | 1.39 | 1.23 | 1.15 | 1.03 |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of Connecticut Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 180 | 17,294 | 7,611 | 10,003 |
| | Private Boat | 202 | 23,309 | 10,318 | 16,364 |
| | Shore | 69 | 6,176 | 2,748 | 4,196 |
| Total Durable Expenditures | | 2,542 | 243,148 | 117,080 | 185,258 |
| Total State Economic Impacts | | 2,993 | 289,927 | 137,757 | 215,821 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 53,085 |
| For-Hire | 3,211 | 6,472 | Other Equipment | 14,291 |
| Private Boat | 2,918 | 22,065 | Boat Expenses | 156,489 |
| Shore | 491 | 5,233 | Vehicle Expenses | 11,359 |
| Total | 6,620 | 33,771 | Second Home Expenses | 0 |
| | | | Total Durable Expenditures | 235,225 |
| Total State Trip and Durable Goods Expenditures | | | | 275,616 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 323 | 336 | 302 | 381 | 438 | 402 | 420 | 397 | 198 | 209 |
| Non-Coastal | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Out-of-State | 77 | 44 | 61 | 123 | 93 | 112 | 98 | 67 | 43 | 64 |
| Total Anglers | 400 | 380 | 363 | 504 | 531 | 514 | 518 | 464 | 241 | 273 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 35 | 50 | 64 | 74 | 43 | 41 | 46 | 26 | 64 | 62 |
| Private | 1,174 | 868 | 1,097 | 1,292 | 711 | 871 | 863 | 825 | 830 | 865 |
| Shore | 485 | 571 | 559 | 609 | 665 | 614 | 399 | 475 | 316 | 437 |
| Total Trips | 1,694 | 1,489 | 1,720 | 1,975 | 1,419 | 1,526 | 1,308 | 1,326 | 1,210 | 1,364 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|---|-------|-------|-------|-------|-------|-------|------|-------|-------|-------|
| Atlantic cod | H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Bluefish | H | 247 | 507 | 450 | 623 | 262 | 591 | 307 | 480 | 894 | 299 |
| | R | 576 | 1,167 | 888 | 1,144 | 295 | 715 | 997 | 679 | 726 | 426 |
| Hickory shad | H | 54 | 63 | 35 | 0 | 0 | 1 | 16 | 39 | 8 | 73 |
| | R | 32 | 144 | 4 | 5 | 0 | 0 | 0 | 0 | 1 | 67 |
| Little tunny | H | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 1 |
| | R | 0 | 0 | 1 | 0 | 9 | 8 | 14 | 57 | 0 | 13 |
| Porgies (scup) | H | 508 | 532 | 925 | 549 | 289 | 1,088 | 933 | 868 | 930 | 561 |
| | R | 753 | 740 | 1,006 | 974 | 1,204 | 1,192 | 539 | 1,049 | 1,212 | 1,402 |
| Striped bass | H | 141 | 115 | 119 | 108 | 61 | 93 | 63 | 65 | 143 | 87 |
| | R | 1,762 | 987 | 985 | 3,105 | 1,161 | 671 | 612 | 265 | 778 | 304 |
| Summer flounder | H | 157 | 138 | 112 | 146 | 45 | 35 | 47 | 63 | 270 | 120 |
| | R | 779 | 1,111 | 297 | 991 | 428 | 373 | 345 | 306 | 867 | 638 |
| White perch | H | 0 | 0 | 0 | 7 | 60 | 0 | 0 | 10 | 0 | 14 |
| | R | 0 | 15 | 18 | 52 | 72 | 0 | 0 | 48 | 2 | 7 |
| Winter flounder | H | 4 | 0 | 0 | 0 | 12 | 14 | 19 | 9 | 0 | 1 |
| | R | 0 | 21 | 15 | 0 | 7 | 12 | 0 | 7 | 4 | 1 |
| Wrasses (tautog) | H | 36 | 201 | 353 | 167 | 86 | 116 | 26 | 194 | 105 | 290 |
| | R | 149 | 108 | 745 | 250 | 112 | 257 | 36 | 599 | 455 | 1,590 |

¹ NA = data are not available because out-of-state resident information is collected for individual states but does not specify whether an angler resides in a region.² In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Connecticut's State Economy (% of national total)^{1,2}

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ³ |
|---------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 93,561 (1.2%) | 1,529,827 (1.3%) | 75.61 (1.7%) | 111.25 (1.6%) | 208.15 (1.6%) | ds |
| 2013 | 88,498 (1.2%) | 1,473,605 (1.2%) | 85.90 (1.5%) | 129.12 (1.5%) | 246.90 (1.5%) | ds |
| %Change | -5.7 | -3.8 | 12.0 | 13.8 | 15.7 | NA |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 7 | 11 | ds | 18 | 17 | 17 | 14 | 13 | 25 |
| | Receipts | 551 | 3,206 | ds | 2,375 | 2,550 | 1,518 | 1,066 | 882 | 3,058 |
| Seafood sales, retail | Firms | 24 | 15 | 26 | 25 | 23 | 25 | 21 | 21 | 20 |
| | Receipts | 3,313 | 2,915 | 4,436 | 3,247 | 2,142 | 2,473 | 2,165 | 1,388 | 1,543 |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Establishments | 3 | 4 | 3 | 3 | 2 | 2 | 2 | 1 | 1 |
| | Employees | 113 | 119 | 0 | 59 | 0 | 0 | 0 | 0 | 0 |
| | Payroll | 3,656 | 4,242 | 0 | 1,040 | 0 | 0 | 0 | 0 | 0 |
| Seafood sales, wholesale | Establishments | 17 | 19 | 20 | 24 | 25 | 23 | 24 | 16 | 17 |
| | Employees | 0 | 0 | 183 | 185 | 212 | 216 | 212 | 187 | 178 |
| | Payroll | 0 | 0 | 8,347 | 8,551 | 8,842 | 9,219 | 9,224 | 8,237 | 7,920 |
| Seafood sales, retail | Establishments | 39 | 35 | 36 | 35 | 36 | 39 | 37 | 37 | 36 |
| | Employees | 187 | 196 | 177 | 203 | 205 | 204 | 171 | 233 | 218 |
| | Payroll | 5,028 | 4,937 | 5,252 | 5,248 | 5,551 | 5,563 | 4,824 | 6,349 | 6,344 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 5 | 4 | 4 | 5 | 5 | 6 | 5 | 10 | 9 |
| | Employees | ds | ds | ds | ds | ds | ds | 95 | 256 | ds |
| | Payroll | ds | ds | ds | ds | ds | 8,148 | 7,856 | 32,789 | ds |
| Deep sea freight transportation | Establishments | 11 | 14 | 14 | 12 | 12 | 10 | 11 | 14 | 11 |
| | Employees | 310 | 235 | 228 | 243 | 222 | 225 | 225 | 297 | 184 |
| | Payroll | 36,766 | 47,845 | 48,110 | 46,595 | 45,045 | 29,407 | 41,302 | 37,711 | 28,513 |
| Deep sea passenger transportation | Establishments | 2 | 1 | 2 | 1 | 1 | 1 | 1 | 1 | 0 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| Marinas | Establishments | 117 | 119 | 124 | 125 | 126 | 129 | 128 | 130 | 130 |
| | Employees | 994 | 1,024 | 1,224 | 1,352 | 1,261 | 1,284 | 1,283 | 1,257 | 1,265 |
| | Payroll | 42,754 | 44,829 | 50,809 | 60,016 | 58,065 | 58,877 | 59,851 | 60,803 | 63,211 |
| Marine cargo handling | Establishments | 3 | 3 | 5 | 4 | 3 | 3 | 3 | 0 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | NA | ds |
| | Payroll | ds | ds | 5,925 | ds | ds | ds | ds | NA | ds |
| Navigational services to shipping | Establishments | 8 | 9 | 6 | 6 | 6 | 6 | 5 | 2 | 2 |
| | Employees | 45 | 69 | ds | ds | 5 | ds | 5 | ds | ds |
| | Payroll | 1,768 | 2,423 | 432 | 338 | 696 | 242 | 898 | ds | ds |
| Port & harbor operations | Establishments | 4 | 4 | 4 | 8 | 8 | 6 | 5 | 4 | 5 |
| | Employees | ds | ds | ds | 179 | 166 | 122 | 34 | ds | ds |
| | Payroll | ds | ds | ds | 6,136 | 5,787 | 2,162 | 848 | 1,414 | ds |
| Ship & boat building | Establishments | 17 | 17 | 22 | 15 | 13 | 12 | 11 | 8 | 7 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |

¹ ds = these data are suppressed.² NA = not applicable.³ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

Tables | Maine



2014 Economic Impacts of the Maine Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 41,314 | 2,303,292 | 755,955 | 1,094,928 | 39,198 | 1,993,580 | 689,391 | 985,557 |
| Commercial Harvesters | 18,452 | 1,053,447 | 288,754 | 471,743 | 18,452 | 1,053,447 | 288,754 | 471,743 |
| Seafood Processors & Dealers | 3,141 | 218,238 | 87,620 | 111,958 | 2,809 | 195,179 | 78,362 | 100,129 |
| Importers | 876 | 241,044 | 38,632 | 73,481 | - | - | - | - |
| Seafood Wholesalers & Distributors | 1,296 | 123,009 | 44,125 | 57,417 | 1,100 | 104,416 | 37,455 | 48,739 |
| Retail | 17,548 | 667,555 | 296,825 | 380,329 | 16,836 | 640,538 | 284,819 | 364,946 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 392,122 | 391,293 | 344,022 | 308,233 | 292,315 | 380,435 | 411,983 | 450,926 | 476,423 | 548,943 |
| Finfish & Other | 47,141 | 38,552 | 36,833 | 36,695 | 30,367 | 30,196 | 43,816 | 77,546 | 72,551 | 51,819 |
| Shellfish | 344,982 | 352,742 | 307,189 | 271,538 | 261,948 | 350,240 | 368,168 | 373,380 | 403,872 | 497,125 |
| Key Species | | | | | | | | | | |
| American lobster | 317,948 | 305,443 | 280,634 | 245,146 | 237,519 | 318,304 | 334,577 | 341,861 | 370,207 | 459,600 |
| Atlantic herring | 56 | 10,729 | 9,173 | 8,396 | 7,867 | 8,643 | 14,404 | 14,490 | 15,514 | 16,333 |
| Bloodworms | 6,039 | 5,177 | 6,051 | 5,913 | 6,196 | 5,893 | 5,847 | 5,191 | 5,644 | 6,094 |
| Blue mussel | 2,625 | 2,716 | 1,934 | 1,627 | 2,203 | 2,071 | 1,969 | 1,919 | 2,341 | 2,153 |
| Cod & haddock | 5,177 | 3,982 | 3,728 | 5,257 | 1,752 | 1,528 | 1,666 | 1,362 | 976 | 1,272 |
| Goosefish | 6,232 | 3,238 | 2,402 | 1,478 | 526 | 393 | 578 | 1,059 | 773 | 566 |
| Ocean quahog clam | 3,607 | 3,919 | 3,194 | 2,195 | 1,821 | 1,721 | 2,117 | 1,737 | 1,378 | 1,238 |
| Pollock | 3,106 | 2,309 | 2,160 | 2,321 | 2,047 | 1,503 | 1,929 | 2,527 | 2,562 | 2,878 |
| Sea urchins | 5,142 | 4,741 | 4,367 | 5,410 | 5,866 | 5,490 | 5,113 | 5,024 | 5,781 | 5,325 |
| Softshell clam | 14,081 | 26,940 | 12,574 | 12,826 | 11,686 | 12,960 | 15,852 | 15,655 | 18,102 | 20,247 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 214,514 | 216,657 | 186,324 | 186,696 | 188,388 | 200,876 | 249,496 | 263,421 | 266,413 | 260,358 |
| Finfish & Other | 121,278 | 117,637 | 93,742 | 94,641 | 82,505 | 79,375 | 122,944 | 121,322 | 119,490 | 127,912 |
| Shellfish | 93,236 | 99,020 | 92,582 | 92,056 | 105,883 | 121,501 | 126,552 | 142,099 | 146,923 | 132,447 |
| Key Species | | | | | | | | | | |
| American lobster | 68,730 | 75,346 | 63,959 | 69,863 | 81,179 | 96,246 | 104,923 | 127,237 | 127,756 | 124,366 |
| Atlantic herring | 558 | 97,843 | 74,817 | 67,731 | 64,606 | 57,557 | 97,116 | 92,506 | 98,859 | 104,242 |
| Bloodworms | 456 | 462 | 549 | 537 | 574 | 534 | 526 | 457 | 470 | 448 |
| Blue mussel | 3,357 | 3,435 | 2,643 | 2,289 | 2,760 | 2,582 | 2,810 | 2,399 | 2,282 | 2,270 |
| Cod & haddock | 4,045 | 2,448 | 2,345 | 2,455 | 1,401 | 876 | 842 | 549 | 418 | 688 |
| Goosefish | 7,130 | 3,669 | 2,376 | 1,178 | 603 | 404 | 533 | 1,075 | 874 | 633 |
| Ocean quahog clam | 1,001 | 1,214 | 1,011 | 669 | 556 | 549 | 645 | 698 | 557 | 438 |
| Pollock | 5,260 | 3,678 | 4,245 | 4,064 | 3,040 | 1,640 | 2,325 | 2,666 | 2,227 | 2,319 |
| Sea urchins | 3,517 | 3,372 | 2,761 | 2,900 | 3,487 | 2,592 | 2,407 | 1,904 | 1,988 | 1,981 |
| Softshell clam | 1,857 | 3,918 | 1,948 | 1,998 | 1,902 | 2,077 | 2,365 | 2,257 | 2,297 | 2,085 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| American lobster | 5.45 | 4.63 | 4.88 | 3.83 | 3.17 | 3.54 | 3.34 | 2.77 | 2.94 | 3.70 |
| Atlantic herring | 0.12 | 0.13 | 0.14 | 0.14 | 0.13 | 0.16 | 0.16 | 0.16 | 0.16 | 0.16 |
| Bloodworms | 15.59 | 12.79 | 12.26 | 12.01 | 11.68 | 11.80 | 11.66 | 11.69 | 12.18 | 13.59 |
| Blue mussel | 0.92 | 0.90 | 0.81 | 0.78 | 0.86 | 0.86 | 0.73 | 0.82 | 1.04 | 0.95 |
| Cod & haddock | 1.51 | 1.86 | 1.77 | 2.34 | 1.35 | 1.87 | 2.07 | 2.56 | 2.37 | 1.85 |
| Goosefish | 1.03 | 1.01 | 1.12 | 1.37 | 0.94 | 1.04 | 1.14 | 1.01 | 0.90 | 0.89 |
| Ocean quahog clam | 4.24 | 3.69 | 3.52 | 3.58 | 3.54 | 3.35 | 3.44 | 2.56 | 2.51 | 2.82 |
| Pollock | 0.70 | 0.72 | 0.57 | 0.62 | 0.73 | 0.98 | 0.87 | 0.98 | 1.17 | 1.24 |
| Sea urchins | 1.72 | 1.61 | 1.76 | 2.04 | 1.82 | 2.27 | 2.23 | 2.72 | 2.95 | 2.69 |
| Softshell clam | 8.93 | 7.85 | 7.18 | 7.00 | 6.65 | 6.68 | 7.02 | 7.14 | 8.00 | 9.71 |

2014 Economic Impacts of Maine Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|--------|--------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 113 | 9,801 | 3,936 | 5,459 |
| | Private Boat | 50 | 4,617 | 1,731 | 2,824 |
| | Shore | 219 | 19,179 | 6,756 | 11,028 |
| Total Durable Expenditures | | 669 | 51,358 | 23,253 | 36,204 |
| Total State Economic Impacts | | 1,051 | 84,955 | 35,676 | 55,515 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 17,302 |
| For-Hire | 5,304 | 1,044 | Other Equipment | 6,073 |
| Private Boat | 1,136 | 3,619 | Boat Expenses | 27,937 |
| Shore | 13,482 | 1,667 | Vehicle Expenses | 272 |
| Total | 19,921 | 6,330 | Second Home Expenses | 0 |
| | | | Total Durable Expenditures | 51,584 |
| Total State Trip and Durable Goods Expenditures | | | | 77,835 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 190 | 182 | 174 | 121 | 117 | 122 | 85 | 116 | 102 | 79 |
| Non-Coastal | 20 | 22 | 13 | 9 | 12 | 9 | 7 | 6 | 4 | 5 |
| Out-of-State | 173 | 285 | 260 | 180 | 324 | 159 | 107 | 126 | 129 | 129 |
| Total Anglers | 383 | 489 | 447 | 310 | 453 | 290 | 199 | 248 | 235 | 213 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|------|------|------|------|------|------|------|
| For-Hire | 40 | 31 | 33 | 25 | 26 | 23 | 22 | 20 | 29 | 24 |
| Private | 519 | 548 | 460 | 408 | 334 | 327 | 265 | 212 | 313 | 188 |
| Shore | 524 | 497 | 531 | 421 | 544 | 366 | 240 | 405 | 254 | 327 |
| Total Trips | 1,083 | 1,076 | 1,024 | 854 | 904 | 716 | 527 | 637 | 596 | 539 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|---|-------|-------|-------|------|-------|-------|-------|-------|------|-------|
| American Shad | H | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 |
| | R | 0 | 7 | 4 | 5 | 18 | 9 | 5 | 18 | 1 | 0 |
| Atlantic cod | H | 29 | 14 | 19 | 41 | 45 | 15 | 40 | 26 | 61 | 22 |
| | R | 35 | 49 | 72 | 50 | 36 | 45 | 100 | 80 | 75 | 50 |
| Atlantic mackerel | H | 607 | 450 | 806 | 837 | 1,110 | 1,093 | 1,544 | 1,028 | 704 | 706 |
| | R | 29 | 104 | 80 | 265 | 194 | 178 | 304 | 163 | 59 | 1,166 |
| Blue shark | H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | R | 0 | 0 | 0 | 0 | 1 | 0 | 9 | 2 | 13 | 10 |
| Bluefin tuna | H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Bluefish | H | 38 | 8 | 50 | 30 | 3 | 14 | 0 | 4 | 19 | 0 |
| | R | 49 | 50 | 74 | 55 | 26 | 9 | 8 | 126 | 22 | 0 |
| Haddock | H | 6 | 9 | 12 | 20 | 10 | 4 | 12 | 4 | 6 | 3 |
| | R | 2 | 4 | 11 | 2 | 1 | 4 | 4 | 8 | 46 | 55 |
| Pollock | H | 28 | 67 | 51 | 67 | 62 | 58 | 57 | 50 | 140 | 136 |
| | R | 32 | 23 | 24 | 135 | 34 | 105 | 135 | 89 | 296 | 177 |
| Striped bass | H | 83 | 75 | 53 | 59 | 62 | 18 | 18 | 11 | 23 | 21 |
| | R | 2,985 | 4,001 | 1,116 | 465 | 264 | 193 | 143 | 214 | 423 | 277 |
| Winter flounder | H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | R | 0 | 1 | 0 | 1 | 5 | 0 | 0 | 0 | 1 | 3 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Maine | Marine Economy

Maine's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|----------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 41,933 (0.6%) | 497,387 (0.4%) | 15.87 (0.4%) | 26.51 (0.4%) | 46.05 (0.4%) | 11.59 |
| 2013 | 40,257 (0.5%) | 487,313 (0.4%) | 18.74 (0.3%) | 31.36 (0.4%) | 54.61 (0.3%) | 18.29 |
| %Change | -4.2 | -2.1 | 15.3 | 15.5 | 15.7 | 57.8 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 52 | 54 | 65 | 64 | 63 | 59 | 51 | 51 | 36 |
| | Receipts | 5,082 | 6,463 | 7,177 | 4,261 | 6,605 | 4,480 | 3,077 | 3,294 | 2,757 |
| Seafood sales, retail | Firms | 51 | 45 | 55 | 46 | 48 | 47 | 48 | 46 | 49 |
| | Receipts | 7,331 | 7,115 | 5,905 | 4,035 | 4,882 | 5,835 | 4,608 | 4,492 | 4,200 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 27 | 27 | 27 | 29 | 25 | 27 | 28 | 29 | 28 |
| | Employees | 614 | 616 | 536 | 490 | 545 | 594 | 500 | 492 | 376 |
| | Payroll | 12,349 | 12,304 | 9,351 | 9,288 | 10,427 | 12,851 | 10,353 | 12,011 | 11,797 |
| Seafood sales, wholesale | Establishments | 177 | 167 | 170 | 168 | 164 | 164 | 152 | 136 | 150 |
| | Employees | 1,152 | 996 | 1,015 | 1,210 | 1,126 | 1,153 | 1,109 | 1,047 | 1,340 |
| | Payroll | 30,513 | 32,192 | 32,005 | 36,185 | 37,687 | 39,915 | 38,412 | 40,734 | 46,782 |
| Seafood sales, retail | Establishments | 49 | 55 | 50 | 45 | 49 | 51 | 51 | 48 | 51 |
| | Employees | 184 | 179 | 181 | 148 | 152 | 176 | 177 | 215 | 243 |
| | Payroll | 4,678 | 4,753 | 4,635 | 4,148 | 4,481 | 5,126 | 5,108 | 6,902 | 7,618 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|---------|---------|---------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 3 | 3 | 3 | 5 | 4 | 4 | 4 | 3 | 3 |
| | Employees | ds | ds | ds | ds | 22 | 28 | ds | ds | ds |
| | Payroll | ds | ds | ds | 1,058 | 1,037 | 1,067 | 1,105 | ds | ds |
| Deep sea freight transportation | Establishments | 1 | 1 | 0 | 1 | 1 | 1 | 0 | 0 | 0 |
| | Employees | ds | ds | NA | ds | ds | ds | NA | NA | NA |
| | Payroll | ds | ds | NA | ds | ds | ds | NA | NA | NA |
| Deep sea passenger transportation | Establishments | 1 | 1 | 2 | 1 | 1 | 1 | 1 | 0 | 0 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | NA | NA |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | NA | NA |
| Marinas | Establishments | 84 | 84 | 86 | 87 | 89 | 86 | 84 | 80 | 79 |
| | Employees | 411 | 417 | 464 | 411 | 376 | 395 | 349 | 428 | 403 |
| | Payroll | 14,215 | 15,353 | 18,600 | 15,206 | 14,654 | 14,699 | 15,426 | 17,102 | 17,476 |
| Marine cargo handling | Establishments | 3 | 3 | 3 | 3 | 3 | 2 | 2 | 1 | 2 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Navigational services to shipping | Establishments | 16 | 12 | 15 | 15 | 14 | 13 | 13 | 13 | 14 |
| | Employees | 88 | 93 | 105 | 138 | 93 | 68 | 63 | 65 | 86 |
| | Payroll | 5,890 | 6,260 | 6,737 | 6,148 | 5,369 | 4,928 | 4,776 | 4,730 | 5,660 |
| Port & harbor operations | Establishments | 1 | 1 | 2 | 2 | 1 | 1 | 1 | 6 | 3 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | 2 |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | 130 |
| Ship & boat building | Establishments | 92 | 89 | 94 | 90 | 82 | 75 | 76 | 76 | 79 |
| | Employees | ds | 6,808 | 6,751 | 6,930 | ds | ds | ds | ds | ds |
| | Payroll | ds | 320,288 | 345,036 | 354,899 | ds | ds | ds | ds | ds |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not applicable.

Tables | Massachusetts



Massachusetts | Commercial Fisheries

2014 Economic Impacts of the Massachusetts Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|-----------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 97,761 | 7,954,047 | 2,045,415 | 3,132,490 | 59,347 | 2,210,111 | 811,881 | 1,107,546 |
| Commercial Harvesters | 12,327 | 961,081 | 303,624 | 446,524 | 12,327 | 961,081 | 303,624 | 446,524 |
| Seafood Processors & Dealers | 7,871 | 1,010,662 | 385,325 | 500,989 | 1,698 | 218,072 | 83,142 | 108,099 |
| Importers | 15,688 | 4,315,461 | 691,635 | 1,315,541 | - | - | - | - |
| Seafood Wholesalers & Distributors | 3,198 | 503,131 | 164,415 | 223,086 | 1,074 | 169,044 | 55,241 | 74,953 |
| Retail | 58,676 | 1,163,712 | 500,416 | 646,349 | 44,247 | 861,915 | 369,875 | 477,969 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 427,332 | 586,320 | 420,004 | 399,822 | 400,473 | 478,691 | 571,583 | 616,466 | 565,739 | 525,124 |
| Finfish & Other | 117,003 | 252,456 | 109,370 | 121,913 | 114,361 | 126,582 | 132,765 | 126,638 | 94,572 | 105,399 |
| Shellfish | 310,330 | 333,863 | 310,634 | 277,909 | 286,112 | 352,109 | 438,818 | 489,828 | 471,167 | 419,726 |

Key Species

| | | | | | | | | | | |
|-------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| American lobster | 49,563 | 55,901 | 51,258 | 45,418 | 42,731 | 50,330 | 53,302 | 53,357 | 61,662 | 68,369 |
| Atlantic herring | 69 | NA | 8,265 | 11,342 | 15,062 | 10,251 | 8,802 | 11,529 | 10,750 | 9,490 |
| Atlantic mackerel | NA | 10,320 | 4,736 | 4,265 | 4,528 | 1,487 | 137 | 654 | 1,223 | 2,503 |
| Clams, all other | 19,010 | 14,045 | 15,680 | 15,255 | 16,745 | 17,966 | 19,154 | 37,294 | 28,311 | 26,272 |
| Cod & haddock | 31,954 | 25,397 | 32,043 | 38,696 | 33,684 | 45,210 | 43,397 | 26,123 | 14,083 | 18,558 |
| Eastern oyster | 2,738 | 4,864 | 4,559 | 5,496 | 6,432 | 8,225 | 9,066 | 12,071 | 13,896 | 19,559 |
| Flounders | 28,815 | 24,569 | 22,095 | 20,924 | 19,645 | 19,975 | 22,025 | 25,054 | 20,612 | 19,113 |
| Goosefish | 21,485 | 17,712 | 14,380 | 14,035 | 9,902 | 9,922 | 13,431 | 13,596 | 8,870 | 10,030 |
| Ocean quahog clam | NA | 8,297 | 10,100 | 9,575 | 10,710 | 8,981 | 7,995 | NA | 10,229 | 9,814 |
| Sea scallop | 226,949 | 234,796 | 218,292 | 189,891 | 197,280 | 252,253 | 330,944 | 364,864 | 334,205 | 272,002 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 337,304 | 396,910 | 304,774 | 326,632 | 356,105 | 283,025 | 264,991 | 296,037 | 262,256 | 274,187 |
| Finfish & Other | 267,311 | 304,970 | 227,566 | 256,000 | 279,330 | 201,161 | 180,134 | 193,949 | 164,379 | 183,645 |
| Shellfish | 69,993 | 91,940 | 77,208 | 70,633 | 76,775 | 81,864 | 84,857 | 102,088 | 97,877 | 90,542 |

Key Species

| | | | | | | | | | | |
|-------------------|--------|---------|--------|--------|---------|--------|--------|--------|--------|--------|
| American lobster | 9,880 | 12,100 | 10,145 | 10,600 | 11,782 | 12,760 | 13,373 | 14,485 | 15,260 | 15,321 |
| Atlantic herring | 700 | 119,547 | 73,268 | 94,266 | 133,531 | 71,922 | 66,970 | 81,781 | 74,992 | 78,048 |
| Atlantic mackerel | NA | 89,535 | 46,240 | 35,406 | 30,199 | 12,156 | 515 | 4,131 | 7,279 | 10,859 |
| Clams, all other | 19,881 | 7,071 | 4,135 | 4,376 | 6,552 | 10,242 | 13,352 | 35,053 | 22,495 | 20,704 |
| Cod & haddock | 24,539 | 15,833 | 20,298 | 28,537 | 28,515 | 36,461 | 27,164 | 13,164 | 8,123 | 14,040 |
| Eastern oyster | 105 | 87 | 123 | 138 | 159 | 215 | 231 | 310 | 329 | 467 |
| Flounders | 22,115 | 13,170 | 10,977 | 11,609 | 12,405 | 11,158 | 13,692 | 14,247 | 11,517 | 10,324 |
| Goosefish | 21,849 | 17,495 | 13,597 | 12,680 | 10,015 | 8,887 | 10,143 | 11,583 | 9,498 | 10,528 |
| Ocean quahog clam | NA | 16,830 | 20,158 | 18,126 | 18,691 | 15,646 | 12,479 | NA | 14,476 | 13,422 |
| Sea scallop | 29,045 | 36,666 | 32,540 | 27,011 | 29,782 | 31,156 | 33,092 | 36,725 | 29,287 | 21,388 |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| American lobster | 5.02 | 4.62 | 5.05 | 4.28 | 3.63 | 3.94 | 3.99 | 3.68 | 4.04 | 4.46 |
| Atlantic herring | 0.10 | 1.25 | 0.11 | 0.12 | 0.11 | 0.14 | 0.13 | 0.14 | 0.14 | 0.12 |
| Atlantic mackerel | NA | 0.12 | 0.10 | 0.12 | 0.15 | 0.12 | 0.27 | 0.16 | 0.17 | 0.23 |
| Clams, all other | 0.96 | 1.99 | 3.79 | 3.49 | 2.56 | 1.75 | 1.43 | 1.06 | 1.26 | 1.27 |
| Cod & haddock | 1.30 | 1.60 | 1.58 | 1.36 | 1.18 | 1.24 | 1.60 | 1.98 | 1.73 | 1.32 |
| Eastern oyster | 26.09 | 56.10 | 37.00 | 39.77 | 40.36 | 38.30 | 39.25 | 38.96 | 42.28 | 41.92 |
| Flounders | 1.30 | 1.87 | 2.01 | 1.80 | 1.58 | 1.79 | 1.61 | 1.76 | 1.79 | 1.85 |
| Goosefish | 0.98 | 1.01 | 1.06 | 1.11 | 0.99 | 1.12 | 1.32 | 1.17 | 0.93 | 0.95 |
| Ocean quahog clam | NA | 0.49 | 0.50 | 0.53 | 0.57 | 0.57 | 0.64 | NA | 0.71 | 0.73 |
| Sea scallop | 7.81 | 6.40 | 6.71 | 7.03 | 6.62 | 8.10 | 10.00 | 9.93 | 11.41 | 12.72 |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of Massachusetts Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 975 | 108,633 | 53,594 | 69,226 |
| | Private Boat | 822 | 94,960 | 42,961 | 63,177 |
| | Shore | 1,319 | 141,008 | 59,423 | 91,145 |
| Total Durable Expenditures | | 11,148 | 1,047,395 | 532,525 | 772,732 |
| Total State Economic Impacts | | 14,264 | 1,391,996 | 688,503 | 996,280 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 253,036 |
| For-Hire | 44,891 | 20,788 | Other Equipment | 103,991 |
| Private Boat | 19,728 | 77,468 | Boat Expenses | 683,894 |
| Shore | 70,423 | 38,212 | Vehicle Expenses | 113,868 |
| Total | 135,042 | 136,469 | Second Home Expenses | 1,452 |
| | | | Total Durable Expenditures | 1,156,240 |
| Total State Trip and Durable Goods Expenditures | | | | 1,427,751 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|------|------|------|-------|
| Coastal | 585 | 623 | 664 | 655 | 489 | 586 | 490 | 502 | 546 | 582 |
| Non-Coastal | 135 | 151 | 179 | 170 | 144 | 152 | 115 | 130 | 77 | 82 |
| Out-of-State | 391 | 484 | 465 | 469 | 421 | 433 | 293 | 309 | 275 | 532 |
| Total Anglers | 1,111 | 1,258 | 1,308 | 1,294 | 1,054 | 1,171 | 898 | 941 | 898 | 1,196 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 236 | 231 | 233 | 255 | 240 | 154 | 189 | 204 | 259 | 243 |
| Private | 2,336 | 2,411 | 2,440 | 2,338 | 1,760 | 2,148 | 1,319 | 1,471 | 1,621 | 1,568 |
| Shore | 1,739 | 1,938 | 1,947 | 1,929 | 1,451 | 1,186 | 1,305 | 1,151 | 1,058 | 1,586 |
| Total Trips | 4,311 | 4,580 | 4,620 | 4,522 | 3,451 | 3,488 | 2,813 | 2,826 | 2,938 | 3,397 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Atlantic bonito | H | 30 | 13 | 4 | 7 | 4 | 1 | 5 | 5 | 0 | 17 |
| | R | 9 | 38 | 12 | 9 | 1 | 3 | 0 | 0 | 1 | 8 |
| Atlantic cod | H | 387 | 119 | 232 | 260 | 213 | 412 | 360 | 229 | 216 | 185 |
| | R | 932 | 423 | 658 | 671 | 581 | 884 | 542 | 240 | 411 | 479 |
| Atlantic mackerel | H | 1,926 | 3,603 | 951 | 2,024 | 471 | 2,083 | 1,649 | 1,133 | 2,273 | 1,926 |
| | R | 17 | 423 | 27 | 152 | 68 | 185 | 43 | 160 | 177 | 225 |
| Bluefish | H | 549 | 652 | 683 | 519 | 344 | 474 | 225 | 336 | 448 | 437 |
| | R | 1,813 | 1,843 | 1,240 | 1,302 | 953 | 1,029 | 598 | 714 | 580 | 2,213 |
| Haddock | H | 247 | 121 | 293 | 233 | 155 | 144 | 52 | 90 | 104 | 114 |
| | R | 62 | 63 | 56 | 158 | 36 | 33 | 12 | 68 | 310 | 403 |
| Porgies (scup) | H | 657 | 424 | 1,770 | 762 | 1,069 | 925 | 786 | 1,587 | 2,042 | 1,635 |
| | R | 751 | 1,096 | 1,183 | 1,688 | 1,741 | 1,858 | 1,174 | 1,805 | 1,257 | 1,283 |
| Striped bass | H | 341 | 314 | 316 | 378 | 345 | 340 | 256 | 379 | 298 | 278 |
| | R | 3,989 | 7,810 | 5,331 | 3,649 | 2,282 | 1,671 | 972 | 990 | 1,690 | 1,827 |
| Summer flounder | H | 267 | 239 | 138 | 233 | 50 | 45 | 58 | 76 | 32 | 113 |
| | R | 358 | 610 | 135 | 273 | 96 | 215 | 183 | 250 | 63 | 337 |
| Winter flounder | H | 38 | 43 | 41 | 169 | 87 | 86 | 69 | 46 | 43 | 92 |
| | R | 41 | 21 | 19 | 62 | 84 | 68 | 58 | 18 | 16 | 46 |
| Wrasses (tautog) | H | 72 | 80 | 91 | 34 | 25 | 45 | 33 | 25 | 58 | 101 |
| | R | 126 | 332 | 414 | 78 | 96 | 118 | 210 | 96 | 231 | 423 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Massachusetts | Marine Economy

Massachusetts's State Economy (% of national total)^{1,2}

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ³ |
|---------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 175,291 (2.3%) | 2,996,347 (2.6%) | 140.58 (3.1%) | 199.47 (2.8%) | 344.14 (2.6%) | 9.54 |
| 2013 | 172,533 (2.3%) | 3,062,689 (2.6%) | 178.30 (3.2%) | 257.95 (2.9%) | 441.47 (2.6%) | ds |
| %Change | -1.6 | 2.2 | 21.2 | 22.7 | 22.0 | NA |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 28 | 36 | 24 | 26 | 22 | 27 | 36 | 25 | 28 |
| | Receipts | 2,266 | 2,525 | 908 | 1,250 | 1,943 | 2,082 | 2,433 | 1,699 | 1,857 |
| Seafood sales, retail | Firms | 59 | 62 | 57 | 64 | 64 | 61 | 66 | 65 | 51 |
| | Receipts | 5,528 | 4,905 | 4,421 | 7,982 | 7,686 | 6,287 | 7,640 | 5,213 | 3,842 |

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

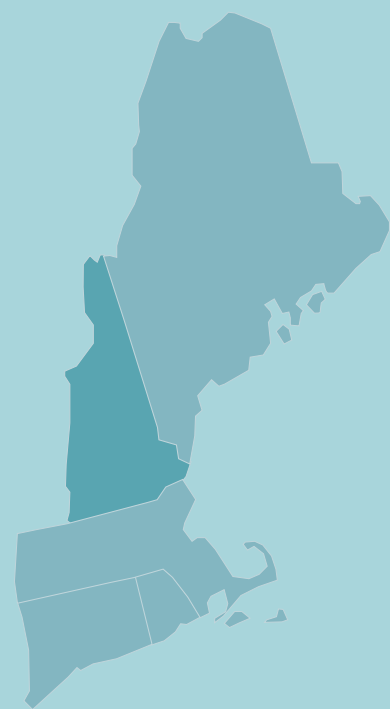
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Seafood product prep. & packaging | Establishments | 50 | 47 | 52 | 44 | 44 | 44 | 44 | 39 | 40 |
| | Employees | 2,671 | 2,607 | 2,684 | 2,355 | 2,396 | 2,159 | 2,214 | 1,638 | 1,755 |
| | Payroll | 115,704 | 120,912 | 113,580 | 109,747 | 119,282 | 107,635 | 112,399 | 74,541 | 87,153 |
| Seafood sales, wholesale | Establishments | 151 | 139 | 160 | 141 | 144 | 149 | 141 | 140 | 142 |
| | Employees | 1,836 | 1,706 | 1,803 | 1,442 | 1,542 | 1,591 | 2,013 | 1,841 | 1,910 |
| | Payroll | 76,070 | 77,106 | 81,863 | 68,898 | 70,864 | 83,467 | 94,105 | 100,801 | 104,637 |
| Seafood sales, retail | Establishments | 116 | 115 | 126 | 118 | 115 | 112 | 106 | 114 | 114 |
| | Employees | 677 | 692 | 737 | 549 | 542 | 584 | 576 | 576 | 708 |
| | Payroll | 17,725 | 18,165 | 19,267 | 15,017 | 15,261 | 16,495 | 16,037 | 15,776 | 18,304 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 10 | 12 | 14 | 14 | 12 | 12 | 10 | 14 | 8 |
| | Employees | ds | 623 | 283 | 169 | 166 | ds | ds | ds | 22 |
| | Payroll | ds | 38,421 | 18,620 | 11,701 | 10,011 | ds | ds | 3,266 | 1,352 |
| Deep sea freight transportation | Establishments | 10 | 11 | 12 | 8 | 10 | 8 | 7 | 9 | 8 |
| | Employees | ds | 509 | ds | 361 | ds | 313 | 381 | ds | ds |
| | Payroll | ds | 38,982 | ds | 38,908 | 35,473 | 36,069 | 38,797 | ds | ds |
| Deep sea passenger transportation | Establishments | 4 | 4 | 1 | 0 | 1 | 0 | 0 | 0 | 0 |
| | Employees | ds | ds | ds | NA | ds | NA | NA | NA | NA |
| | Payroll | ds | ds | ds | NA | ds | NA | NA | NA | NA |
| Marinas | Establishments | 139 | 141 | 173 | 175 | 177 | 175 | 176 | 172 | 178 |
| | Employees | 973 | 1,064 | 1,154 | 1,138 | 1,188 | 1,150 | 1,125 | 977 | 1,054 |
| | Payroll | 43,103 | 45,894 | 51,705 | 53,694 | 56,663 | 57,002 | 58,251 | 48,657 | 55,053 |
| Marine cargo handling | Establishments | 5 | 4 | 5 | 3 | 2 | 2 | 2 | 4 | 3 |
| | Employees | ds | ds | 69 | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | 2,867 | 2,271 | ds | ds | ds | ds | ds |
| Navigational services to shipping | Establishments | 6 | 11 | 9 | 8 | 11 | 9 | 9 | 8 | 11 |
| | Employees | ds | ds | 65 | 75 | 71 | 150 | 139 | 120 | 94 |
| | Payroll | ds | ds | 4,540 | 4,355 | 4,342 | 9,413 | 6,980 | 5,965 | 6,578 |
| Port & harbor operations | Establishments | 3 | 4 | 3 | 4 | 4 | 8 | 6 | 5 | 3 |
| | Employees | ds | ds | 69 | 63 | 66 | 86 | 95 | 35 | ds |
| | Payroll | ds | ds | 647 | 1,289 | 1,323 | 2,662 | 3,035 | 1,519 | ds |
| Ship & boat building | Establishments | 50 | 47 | 49 | 43 | 38 | 37 | 37 | 40 | 41 |
| | Employees | 588 | ds | 588 | 603 | 579 | 535 | 445 | 446 | 463 |
| | Payroll | 20,050 | ds | 26,445 | 28,402 | 20,685 | 20,196 | 22,066 | 23,195 | 23,615 |

¹ ds = these data are suppressed.² NA = not applicable.³ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

Tables | New Hampshire



2014 Economic Impacts of the New Hampshire Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|---------|--------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 11,217 | 1,582,868 | 359,000 | 578,673 | 2,338 | 129,290 | 47,844 | 65,427 |
| Commercial Harvesters | 807 | 47,062 | 13,301 | 20,656 | 807 | 47,062 | 13,301 | 20,656 |
| Seafood Processors & Dealers | 1,219 | 131,333 | 51,606 | 66,542 | 185 | 19,952 | 7,840 | 10,109 |
| Importers | 4,104 | 1,128,980 | 180,941 | 344,163 | - | - | - | - |
| Seafood Wholesalers & Distributors | 747 | 94,713 | 33,387 | 43,936 | 72 | 9,109 | 3,211 | 4,226 |
| Retail | 4,339 | 180,781 | 79,765 | 103,375 | 1,274 | 53,167 | 23,492 | 30,436 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 22,084 | 18,970 | 17,021 | 17,471 | 17,754 | 20,599 | 23,483 | 23,241 | 20,163 | 26,833 |
| Finfish & Other | 6,840 | 5,122 | 4,151 | 4,824 | 5,569 | 5,122 | 6,147 | 5,579 | 2,908 | 2,938 |
| Shellfish | 15,244 | 13,848 | 12,870 | 12,647 | 12,186 | 15,477 | 17,336 | 17,662 | 17,256 | 23,895 |
| Key Species | | | | | | | | | | |
| American lobster | 14,377 | 12,582 | 12,517 | 12,267 | 11,919 | 14,836 | 16,343 | 17,169 | 16,601 | 23,251 |
| Atlantic cod | 1,913 | 1,732 | 1,972 | 2,311 | 2,587 | 2,187 | 2,500 | 1,750 | 546 | 572 |
| Atlantic herring | NA | 3 | 147 | 134 | 271 | 375 | 208 | 349 | 216 | NA |
| Goosefish | 1,484 | 783 | 375 | 290 | 280 | 212 | 207 | 153 | 186 | NA |
| Haddock | 136 | 128 | 123 | 89 | 68 | 29 | 35 | 95 | 22 | 18 |
| Hake | 279 | 165 | 244 | 167 | 215 | 237 | 445 | 474 | 374 | NA |
| Pollock | 1,138 | 1,502 | 902 | 1,093 | 1,283 | 839 | 1,355 | 1,224 | 1,135 | 860 |
| Sea scallop | 527 | 126 | 30 | 16 | 4 | 3 | 26 | 143 | 287 | 350 |
| Shrimp | 340 | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Spiny dogfish | NA | 76 | NA | 419 | 557 | 293 | 451 | 420 | 96 | NA |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|-------|--------|--------|--------|--------|--------|-------|-------|
| Total Landings | 21,281 | 10,295 | 8,430 | 10,464 | 13,886 | 11,809 | 12,315 | 12,148 | 8,254 | 9,691 |
| Finfish & Other | 18,081 | 7,463 | 5,174 | 7,180 | 10,093 | 7,026 | 7,144 | 7,546 | 3,995 | 4,311 |
| Shellfish | 3,200 | 2,832 | 3,256 | 3,284 | 3,793 | 4,783 | 5,171 | 4,603 | 4,259 | 5,380 |
| Key Species | | | | | | | | | | |
| American lobster | 2,556 | 2,357 | 2,469 | 2,567 | 2,985 | 3,648 | 3,919 | 4,229 | 3,818 | 4,939 |
| Atlantic cod | 1,293 | 1,024 | 1,168 | 1,479 | 1,984 | 1,227 | 1,286 | 726 | 230 | 264 |
| Atlantic herring | NA | 22 | 936 | 1,198 | 3,120 | 2,830 | 1,514 | 2,391 | 1,579 | NA |
| Goosefish | 1,226 | 621 | 325 | 250 | 250 | 172 | 153 | 126 | 162 | NA |
| Haddock | 99 | 73 | 61 | 53 | 45 | 18 | 19 | 45 | 10 | 10 |
| Hake | 372 | 157 | 313 | 222 | 423 | 322 | 587 | 1,135 | 393 | NA |
| Pollock | 1,997 | 2,566 | 2,025 | 2,456 | 2,017 | 1,042 | 1,732 | 1,049 | 983 | 629 |
| Sea scallop | 76 | 21 | 4 | 2 | 1 | NA | 3 | 12 | 25 | 27 |
| Shrimp | 567 | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Spiny dogfish | NA | 242 | NA | 1,370 | 2,073 | 1,214 | 1,646 | 1,789 | 515 | NA |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|------|------|------|------|------|------|-------|-------|-------|-------|
| American lobster | 5.62 | 5.34 | 5.07 | 4.78 | 3.99 | 4.07 | 4.17 | 4.06 | 4.35 | 4.71 |
| Atlantic cod | 1.48 | 1.69 | 1.69 | 1.56 | 1.30 | 1.78 | 1.94 | 2.41 | 2.38 | 2.17 |
| Atlantic herring | NA | 0.12 | 0.16 | 0.11 | 0.09 | 0.13 | 0.14 | 0.15 | 0.14 | NA |
| Goosefish | 1.21 | 1.26 | 1.15 | 1.16 | 1.12 | 1.23 | 1.36 | 1.21 | 1.15 | NA |
| Haddock | 1.38 | 1.76 | 2.01 | 1.70 | 1.52 | 1.57 | 1.91 | 2.13 | 2.16 | 1.74 |
| Hake | 0.75 | 1.05 | 0.78 | 0.75 | 0.51 | 0.74 | 0.76 | 0.42 | 0.95 | NA |
| Pollock | 0.57 | 0.59 | 0.45 | 0.45 | 0.64 | 0.81 | 0.78 | 1.17 | 1.15 | 1.37 |
| Sea scallop | 6.89 | 5.92 | 8.26 | 7.68 | 7.22 | 8.84 | 10.35 | 11.68 | 11.54 | 12.85 |
| Shrimp | 0.60 | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Spiny dogfish | NA | 0.32 | NA | 0.31 | 0.27 | 0.24 | 0.27 | 0.23 | 0.19 | NA |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of New Hampshire Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|--------|--------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 219 | 21,860 | 10,242 | 13,184 |
| | Private Boat | 44 | 4,592 | 2,107 | 3,066 |
| | Shore | 10 | 948 | 389 | 604 |
| Total Durable Expenditures | | 290 | 25,293 | 12,637 | 18,331 |
| Total State Economic Impacts | | 563 | 52,693 | 25,375 | 35,185 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 9,080 | 4,540 | Fishing Tackle | 11,589 |
| Private Boat | 348 | 4,622 | Other Equipment | 3,553 |
| Shore | 534 | 257 | Boat Expenses | 13,780 |
| Total | 9,961 | 9,418 | Vehicle Expenses | 1,352 |
| | | | Second Home Expenses | 0 |
| | | | Total Durable Expenditures | 30,274 |
| Total State Trip and Durable Goods Expenditures | | | | 49,653 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 105 | 90 | 97 | 63 | 67 | 46 | 56 | 58 | 68 | 50 |
| Non-Coastal | 14 | 15 | 13 | 8 | 9 | 7 | 10 | 9 | 19 | 11 |
| Out-of-State | 84 | 82 | 63 | 46 | 58 | 33 | 30 | 54 | 66 | 58 |
| Total Anglers | 203 | 187 | 173 | 117 | 134 | 86 | 96 | 121 | 153 | 119 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|------|------|------|------|------|------|------|------|------|------|
| For-Hire | 53 | 92 | 114 | 90 | 98 | 62 | 71 | 55 | 116 | 105 |
| Private | 238 | 182 | 233 | 139 | 147 | 90 | 178 | 163 | 107 | 113 |
| Shore | 214 | 227 | 155 | 103 | 155 | 92 | 48 | 81 | 89 | 34 |
| Total Trips | 505 | 501 | 502 | 332 | 400 | 244 | 297 | 299 | 312 | 252 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|---|------|------|------|------|------|------|-------|-------|------|------|
| Atlantic cod | H | 68 | 66 | 53 | 81 | 128 | 80 | 128 | 64 | 115 | 45 |
| | R | 138 | 248 | 234 | 232 | 209 | 130 | 259 | 150 | 155 | 133 |
| Atlantic mackerel | H | 407 | 115 | 128 | 496 | 882 | 295 | 2,143 | 1,116 | 708 | 628 |
| | R | 16 | 32 | 9 | 36 | 82 | 18 | 189 | 160 | 14 | 30 |
| Bluefin tuna | H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 |
| Bluefish | H | 21 | 9 | 34 | 6 | 0 | 2 | 2 | 9 | 0 | 1 |
| | R | 49 | 24 | 18 | 3 | 2 | 0 | 1 | 4 | 0 | 1 |
| Bottomfish, unidentified | H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Haddock | H | 102 | 167 | 97 | 90 | 100 | 48 | 76 | 74 | 71 | 76 |
| | R | 38 | 109 | 43 | 18 | 28 | 11 | 20 | 114 | 257 | 425 |
| Pollock | H | 60 | 77 | 70 | 52 | 39 | 52 | 100 | 65 | 119 | 101 |
| | R | 35 | 46 | 17 | 20 | 49 | 75 | 105 | 147 | 238 | 154 |
| Striped bass | H | 25 | 13 | 7 | 6 | 9 | 6 | 32 | 14 | 18 | 6 |
| | R | 573 | 461 | 257 | 78 | 58 | 51 | 98 | 64 | 84 | 78 |
| Winter flounder | H | 1 | 7 | 10 | 10 | 10 | 2 | 12 | 0 | 0 | 4 |
| | R | 1 | 3 | 7 | 6 | 5 | 5 | 2 | 1 | 3 | 5 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

New Hampshire | Marine Economy

New Hampshire's State Economy (% of national total)^{1,2}

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ³ |
|---------|-----------------|----------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 39,224 (0.5%) | 562,398 (0.5%) | 21.03 (0.5%) | 31.97 (0.5%) | 56.12 (0.4%) | ds |
| 2013 | 37,185 (0.5%) | 551,793 (0.5%) | 24.91 (0.4%) | 38.93 (0.4%) | 68.70 (0.4%) | ds |
| %Change | -5.5 | -1.9 | 15.6 | 17.9 | 18.3 | NA |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 4 | 4 | 5 | ds | ds | 3 | 7 | 7 | 6 |
| | Receipts | 842 | 1,087 | 927 | ds | ds | 687 | 856 | 1,166 | 1,239 |
| Seafood sales, retail | Firms | 11 | 10 | 11 | 17 | 14 | 11 | 11 | 12 | 15 |
| | Receipts | 1,330 | 1,496 | 1,540 | 1,894 | 1,870 | 1,502 | 2,152 | 2,096 | 1,861 |

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

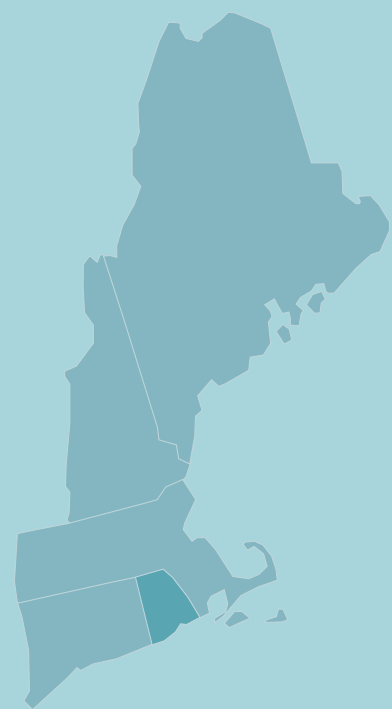
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|-------|-------|-------|-------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 10 | 10 | 7 | 7 | 8 | 8 | 8 | 8 | 7 |
| | Employees | 418 | 0 | 0 | 0 | 115 | 292 | 231 | 229 | 225 |
| | Payroll | 16,275 | 0 | 0 | 0 | 3,234 | 10,971 | 12,010 | 12,181 | 13,751 |
| Seafood sales, wholesale | Establishments | 10 | 9 | 8 | 8 | 8 | 8 | 7 | 8 | 9 |
| | Employees | 0 | 0 | 92 | 101 | 88 | 80 | 84 | 99 | 113 |
| | Payroll | 0 | 0 | 3,360 | 4,142 | 4,268 | 4,171 | 4,123 | 5,738 | 4,562 |
| Seafood sales, retail | Establishments | 12 | 15 | 15 | 14 | 14 | 12 | 16 | 9 | 9 |
| | Employees | 79 | 78 | 93 | 83 | 95 | 102 | 88 | 48 | 45 |
| | Payroll | 2,053 | 2,201 | 2,077 | 2,011 | 2,299 | 2,296 | 1,934 | 870 | 966 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|-------|------|-------|-------|-------|-------|-------|-------|-------|
| Coastal & Great Lakes freight transportation | Establishments | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 1 | 0 |
| | Employees | ds | ds | ds | NA | NA | NA | NA | ds | NA |
| | Payroll | ds | ds | ds | NA | NA | NA | NA | ds | NA |
| Deep sea freight transportation | Establishments | 2 | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Employees | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| | Payroll | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Marinas | Establishments | 38 | 35 | 35 | 37 | 37 | 35 | 34 | 31 | 35 |
| | Employees | 194 | ds | 171 | 173 | 146 | 135 | 139 | 131 | 155 |
| | Payroll | 8,871 | ds | 7,774 | 8,114 | 7,022 | 6,920 | 7,090 | 6,927 | 8,031 |
| Marine cargo handling | Establishments | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Employees | NA | NA | ds | NA | NA | NA | NA | NA | NA |
| | Payroll | NA | NA | ds | NA | NA | NA | NA | NA | NA |
| Navigational services to shipping | Establishments | 4 | 4 | 2 | 2 | 2 | 2 | 2 | 3 | 3 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Port & harbor operations | Establishments | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 |
| | Employees | NA | NA | NA | NA | NA | NA | NA | ds | ds |
| | Payroll | NA | NA | NA | NA | NA | NA | NA | ds | ds |
| Ship & boat building | Establishments | 6 | 6 | 8 | 9 | 8 | 7 | 7 | 7 | 7 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |

¹ ds = these data are suppressed.² NA = not applicable.³ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

Tables | Rhode Island



Rhode Island | Commercial Fisheries

2014 Economic Impacts of the Rhode Island Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 10,174 | 1,096,821 | 273,316 | 428,503 | 5,370 | 305,502 | 110,683 | 154,995 |
| Commercial Harvesters | 2,402 | 148,791 | 45,084 | 70,192 | 2,402 | 148,791 | 45,084 | 70,192 |
| Seafood Processors & Dealers | 515 | 53,555 | 20,753 | 26,968 | 336 | 34,998 | 13,562 | 17,624 |
| Importers | 2,348 | 645,992 | 103,532 | 196,927 | - | - | - | - |
| Seafood Wholesalers & Distributors | 523 | 62,480 | 22,138 | 29,129 | 137 | 16,327 | 5,785 | 7,612 |
| Retail | 4,386 | 186,004 | 81,808 | 105,287 | 2,495 | 105,386 | 46,253 | 59,568 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 91,408 | 99,365 | 72,282 | 66,085 | 61,657 | 62,739 | 75,929 | 81,136 | 86,371 | 86,211 |
| Finfish & Other | 24,672 | 29,680 | 24,839 | 22,792 | 23,421 | 23,040 | 24,934 | 28,671 | 29,519 | 31,591 |
| Shellfish | 66,736 | 69,685 | 47,443 | 43,293 | 38,236 | 39,698 | 50,995 | 52,464 | 56,852 | 54,620 |
| Key Species | | | | | | | | | | |
| All other flounders | 1,734 | 3,503 | 3,585 | 2,171 | 1,455 | 593 | 806 | 1,024 | 2,124 | 2,696 |
| American lobster | 23,009 | 17,333 | 12,151 | 12,976 | 11,264 | 12,404 | 12,765 | 12,119 | 9,732 | 11,788 |
| Atlantic herring | 1,075 | 2,947 | 982 | 631 | 1,260 | 1,423 | 1,343 | 2,174 | 4,907 | 2,304 |
| Atlantic mackerel | 2,888 | 4,138 | 1,182 | 882 | 3,301 | 1,886 | 100 | 2,804 | 339 | 309 |
| Goosefish | 4,549 | 4,525 | 3,540 | 3,590 | 3,022 | 2,973 | 4,600 | 3,844 | 2,725 | 2,990 |
| Quahog clam | 3,438 | 3,529 | 4,010 | 3,273 | 2,849 | 3,293 | 3,920 | 5,169 | 5,033 | 5,122 |
| Scups or porgies | 2,319 | 2,927 | 2,767 | 2,324 | 2,640 | 2,833 | 3,312 | 3,904 | 3,666 | 4,100 |
| Sea scallop | 13,268 | 20,822 | 8,963 | 2,170 | 2,342 | 2,156 | 6,834 | 9,191 | 18,639 | 10,286 |
| Squid | 16,973 | 22,601 | 15,339 | 17,687 | 15,249 | 12,590 | 20,380 | 12,744 | 13,208 | 17,715 |
| Summer flounder | 5,866 | 5,093 | 4,346 | 4,485 | 4,502 | 5,534 | 6,408 | 6,937 | 6,751 | 7,295 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------|--------|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Landings | 97,565 | 113,025 | 75,271 | 72,027 | 84,041 | 77,738 | 78,747 | 85,232 | 89,886 | 91,379 |
| Finfish & Other | 47,820 | 60,867 | 40,940 | 34,570 | 46,549 | 42,595 | 42,250 | 52,837 | 63,875 | 57,158 |
| Shellfish | 49,745 | 52,158 | 34,331 | 37,458 | 37,492 | 35,143 | 36,498 | 32,396 | 26,011 | 34,221 |
| Key Species | | | | | | | | | | |
| All other flounders | 1,315 | 1,850 | 1,871 | 1,144 | 1,027 | 358 | 615 | 663 | 1,367 | 1,857 |
| American lobster | 4,344 | 3,752 | 2,293 | 2,772 | 2,840 | 2,929 | 2,754 | 2,706 | 2,156 | 2,425 |
| Atlantic herring | 11,605 | 23,150 | 7,537 | 4,504 | 9,528 | 8,479 | 8,729 | 13,839 | 28,330 | 16,505 |
| Atlantic mackerel | 8,075 | 10,143 | 4,242 | 2,385 | 9,057 | 4,356 | 162 | 5,497 | 714 | 539 |
| Goosefish | 4,143 | 3,864 | 3,209 | 3,225 | 2,841 | 2,556 | 3,242 | 2,873 | 2,818 | 2,892 |
| Quahog clam | 642 | 385 | 610 | 556 | 511 | 599 | 666 | 903 | 818 | 768 |
| Scups or porgies | 3,424 | 3,643 | 3,932 | 2,151 | 3,619 | 4,299 | 6,335 | 6,309 | 7,346 | 6,932 |
| Sea scallop | 1,612 | 3,283 | 1,357 | 310 | 356 | 267 | 690 | 944 | 1,646 | 842 |
| Squid | 22,135 | 39,617 | 23,718 | 26,417 | 26,452 | 19,799 | 25,996 | 11,689 | 12,609 | 24,936 |
| Summer flounder | 2,925 | 2,123 | 1,516 | 1,473 | 1,794 | 2,289 | 2,824 | 2,409 | 2,193 | 2,055 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------|------|------|------|------|------|------|------|------|-------|-------|
| All other flounders | 1.32 | 1.89 | 1.92 | 1.90 | 1.42 | 1.66 | 1.31 | 1.54 | 1.55 | 1.45 |
| American lobster | 5.30 | 4.62 | 5.30 | 4.68 | 3.97 | 4.24 | 4.64 | 4.48 | 4.51 | 4.86 |
| Atlantic herring | 0.09 | 0.13 | 0.13 | 0.14 | 0.13 | 0.17 | 0.15 | 0.16 | 0.17 | 0.14 |
| Atlantic mackerel | 0.36 | 0.41 | 0.28 | 0.37 | 0.36 | 0.43 | 0.62 | 0.51 | 0.47 | 0.57 |
| Goosefish | 1.10 | 1.17 | 1.10 | 1.11 | 1.06 | 1.16 | 1.42 | 1.34 | 0.97 | 1.03 |
| Quahog clam | 5.35 | 9.16 | 6.57 | 5.88 | 5.58 | 5.50 | 5.89 | 5.72 | 6.15 | 6.67 |
| Scups or porgies | 0.68 | 0.80 | 0.70 | 1.08 | 0.73 | 0.66 | 0.52 | 0.62 | 0.50 | 0.59 |
| Sea scallop | 8.23 | 6.34 | 6.61 | 7.00 | 6.58 | 8.07 | 9.90 | 9.73 | 11.32 | 12.22 |
| Squid | 0.77 | 0.57 | 0.65 | 0.67 | 0.58 | 0.64 | 0.78 | 1.09 | 1.05 | 0.71 |
| Summer flounder | 2.01 | 2.40 | 2.87 | 3.04 | 2.51 | 2.42 | 2.27 | 2.88 | 3.08 | 3.55 |

2014 Economic Impacts of Rhode Island Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 140 | 14,507 | 6,835 | 8,873 |
| | Private Boat | 173 | 17,470 | 7,334 | 10,846 |
| | Shore | 80 | 7,990 | 3,402 | 5,014 |
| Total Durable Expenditures | | 4,046 | 381,388 | 181,672 | 276,195 |
| Total State Economic Impacts | | 4,439 | 421,355 | 199,243 | 300,928 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 7,716 | 1,385 | Fishing Tackle | 91,396 |
| Private Boat | 7,296 | 10,902 | Other Equipment | 28,325 |
| Shore | 4,951 | 3,576 | Boat Expenses | 227,529 |
| Total | 19,963 | 15,863 | Vehicle Expenses | 22,302 |
| | | | Second Home Expenses | 966 |
| | | | Total Durable Expenditures | 370,518 |
| Total State Trip and Durable Goods Expenditures | | | | 406,344 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 145 | 177 | 171 | 169 | 111 | 161 | 105 | 99 | 129 | 160 |
| Non-Coastal | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Out-of-State | 241 | 291 | 229 | 297 | 209 | 225 | 190 | 169 | 255 | 304 |
| Total Anglers | 386 | 468 | 400 | 466 | 320 | 386 | 295 | 268 | 384 | 464 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|------|-------|-------|-------|-------|-------|
| For-Hire | 54 | 53 | 74 | 67 | 56 | 41 | 39 | 40 | 48 | 52 |
| Private | 793 | 642 | 590 | 716 | 423 | 531 | 536 | 461 | 587 | 491 |
| Shore | 757 | 874 | 759 | 673 | 507 | 667 | 539 | 575 | 595 | 556 |
| Total Trips | 1,604 | 1,569 | 1,423 | 1,456 | 986 | 1,239 | 1,114 | 1,076 | 1,230 | 1,099 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|---|------|-------|------|-------|------|------|------|------|------|------|
| Atlantic bonito | H | 1 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 4 | 1 |
| | R | 0 | 0 | 4 | 1 | 0 | 0 | 0 | 0 | 5 | 6 |
| Atlantic cod | H | 1 | 4 | 1 | 2 | 4 | 2 | 4 | 16 | 0 | 12 |
| | R | 3 | 2 | 0 | 1 | 7 | 12 | 14 | 1 | 0 | 5 |
| Black seabass | H | 86 | 41 | 44 | 52 | 36 | 161 | 50 | 102 | 75 | 214 |
| | R | 64 | 161 | 117 | 128 | 133 | 212 | 221 | 767 | 678 | 859 |
| Bluefish | H | 345 | 471 | 295 | 282 | 64 | 103 | 124 | 673 | 324 | 136 |
| | R | 526 | 555 | 686 | 491 | 160 | 93 | 327 | 427 | 629 | 114 |
| Porgies (scup) | H | 430 | 470 | 353 | 633 | 140 | 398 | 568 | 497 | 818 | 976 |
| | R | 690 | 802 | 613 | 1,386 | 332 | 536 | 663 | 675 | 615 | 578 |
| Striped bass | H | 110 | 76 | 102 | 51 | 71 | 70 | 89 | 62 | 219 | 103 |
| | R | 634 | 835 | 678 | 417 | 399 | 183 | 215 | 247 | 826 | 163 |
| Summer flounder | H | 165 | 264 | 176 | 204 | 72 | 118 | 162 | 103 | 127 | 185 |
| | R | 280 | 1,129 | 612 | 848 | 383 | 230 | 724 | 381 | 527 | 417 |
| Winter flounder | H | 0 | 0 | 1 | 1 | 4 | 2 | 0 | 0 | 0 | 0 |
| | R | 0 | 0 | 3 | 1 | 1 | 1 | 0 | 2 | 0 | 1 |
| Wrasses (tautog) | H | 161 | 81 | 125 | 103 | 86 | 197 | 20 | 104 | 128 | 68 |
| | R | 319 | 198 | 267 | 187 | 188 | 187 | 138 | 214 | 249 | 122 |
| Yellowfin tuna | H | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 1 |
| | R | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

¹ NA = not applicable because all Rhode Island residents are considered coastal county residents.² In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Rhode Island | Marine Economy

Rhode Island's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|----------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 30,331 (0.4%) | 442,291 (0.4%) | 15.76 (0.4%) | 24.99 (0.4%) | 45.25 (0.3%) | 3.7 |
| 2013 | 28,026 (0.4%) | 408,489 (0.3%) | 17.78 (0.3%) | 29.48 (0.3%) | 53.30 (0.3%) | 3.2 |
| %Change | -8.2 | -8.3 | 11.4 | 15.2 | 15.1 | -13.5 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 6 | 8 | 8 | 7 | 9 | 6 | 9 | 10 | 8 |
| | Receipts | 2,024 | 1,662 | 2,291 | 1,376 | 1,045 | 907 | 1,168 | 1,441 | 1,393 |
| Seafood sales, retail | Firms | 16 | 24 | 23 | 19 | 16 | 17 | 25 | 20 | 22 |
| | Receipts | 2,215 | 3,266 | 3,536 | 2,748 | 2,821 | 2,769 | 3,033 | 2,536 | 2,501 |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|-------|--------|--------|--------|-------|-------|--------|--------|-------|
| Seafood product prep. & packaging | Establishments | 7 | 7 | 6 | 8 | 7 | 5 | 4 | 3 | 3 |
| | Employees | 270 | 231 | 196 | 270 | 275 | 193 | 178 | 0 | 0 |
| | Payroll | 5,549 | 6,137 | 6,876 | 6,354 | 5,821 | 6,096 | 5,544 | 0 | 0 |
| Seafood sales, wholesale | Establishments | 32 | 36 | 35 | 29 | 34 | 32 | 34 | 32 | 31 |
| | Employees | 206 | 188 | 224 | 226 | 202 | 204 | 230 | 278 | 182 |
| | Payroll | 9,851 | 10,209 | 11,447 | 10,505 | 9,534 | 9,815 | 10,264 | 13,064 | 8,412 |
| Seafood sales, retail | Establishments | 31 | 28 | 27 | 23 | 24 | 26 | 23 | 24 | 24 |
| | Employees | 140 | 0 | 109 | 94 | 127 | 113 | 109 | 111 | 113 |
| | Payroll | 2,447 | 0 | 2,207 | 2,027 | 2,398 | 2,309 | 2,232 | 2,388 | 2,610 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 1 | 1 | 1 | 2 | 1 | 1 | 2 | 1 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Deep sea freight transportation | Establishments | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 2 |
| | Employees | NA | NA | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | NA | NA | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 66 | 63 | 68 | 73 | 70 | 72 | 71 | 67 | 71 |
| | Employees | 408 | 457 | 463 | 476 | 459 | 428 | 460 | 424 | 466 |
| | Payroll | 15,843 | 18,748 | 22,029 | 23,204 | 21,372 | 22,227 | 22,618 | 20,811 | 24,214 |
| Marine cargo handling | Establishments | 1 | 2 | 2 | 5 | 5 | 5 | 5 | 4 | 4 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Navigational services to shipping | Establishments | 8 | 7 | 7 | 8 | 8 | 8 | 8 | 7 | 7 |
| | Employees | ds | ds | ds | ds | ds | ds | 107 | ds | ds |
| | Payroll | ds | ds | ds | 5,904 | 3,728 | 3,955 | 4,002 | 3,272 | ds |
| Port & harbor operations | Establishments | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 5 | 2 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Ship & boat building | Establishments | 36 | 38 | 37 | 39 | 33 | 29 | 30 | 37 | 33 |
| | Employees | ds | 1,325 | 1,374 | 1,342 | 1,085 | 954 | 916 | 717 | 768 |
| | Payroll | ds | 52,682 | 55,788 | 54,225 | 41,246 | 40,004 | 33,316 | 32,070 | 34,483 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not applicable.

Mid-Atlantic Region

- Delaware
- Maryland
- New Jersey
- New York
- Virginia



Crabbing, Chesapeake Bay, Maryland
(photo credit: Kristy Wallmo)

MANAGEMENT CONTEXT

The Mid-Atlantic Region includes Delaware, Maryland, New Jersey, New York and Virginia. Federal fisheries in this region are managed by the Mid-Atlantic Fishery Management Council (MAFMC) and NOAA Fisheries under seven fishery management plans (FMPs). Two of these FMPs are developed in conjunction with the New England Fishery Management Council (NEFMC). The MAFMC is the lead council for the Spiny Dogfish FMP; the NEFMC is the lead for the Monkfish FMP.

Mid-Atlantic Region FMPs

1. Atlantic mackerel squids and butterfish
2. Atlantic bluefish
3. Spiny dogfish (with the NEFMC)
4. Summer flounder, scup and black sea bass
5. Surfclam and ocean quahog
6. Golden tilefish
7. Monkfish (with the NEFMC)

None of the stocks or stock complexes covered in these FMPs were listed as overfished or experiencing overfishing in 2014.

CATCH SHARE PROGRAMS

Two catch share programs operate in the Mid-Atlantic: 1) Atlantic Surfclam and Ocean Quahog Individual Transferable Quota (ITQ) Program; and 2) Golden Tilefish Individual Fishing Quota (IFQ) Program. Following is a description of these catch share programs and their performance. Because the surfclam and ocean quahog fisheries are prosecuted as independent fisheries despite being in the same ITQ program, they are discussed separately.

The Atlantic Surfclam ITQ Program was implemented in 1990 to conserve the surfclam resource and stabilize harvest rates; simplify regulatory requirements to minimize public and private management costs; promote economic efficiency by bringing harvest capacity in line with processing and biological capacity; and create a management approach that is flexible and adaptive to short-term events or circumstances. The key performance indicators of this program show that compared with the Baseline period (the 3-year period prior to implementation), 2013 quota and inflation-adjusted revenue per

vessel increased. However, landings, the number of active vessels, and inflation-adjusted total revenue decreased.

The Atlantic Ocean Quahog ITQ Program was implemented in 1990 to conserve the quahog resource and stabilize harvest rates; simplify regulatory requirements to minimize public and private management costs; promote economic efficiency by bringing harvest capacity in line with processing and biological capacity; and create a management approach that is flexible and adaptive to short-term events or circumstances. The key performance indicators of this program show that relative to the Baseline period (the 3-year period prior to implementation), 2013 inflation-adjusted revenue per vessel increased. However, quota, landings, number of active vessels, and inflation-adjusted total revenue decreased.

The Golden Tilefish IFQ Program was implemented in 2009 to reduce over-capacity and eliminate problems associated with the race to fish golden tilefish. This IFQ program is unique because many key events occurred outside the traditional management process. Prior to the implementation of the IFQ program, fishermen crafted internal agreements that promoted cooperation. Their cooperative operations helped fishing businesses stay viable under new regulations, which laid the foundation for implementing the IFQ program. The key performance indicators of this program show that relative to the Baseline period (the 3-year period prior to implementation), 2013 quota, landings, inflation-adjusted revenue, and inflation-adjusted revenue per vessel increased. However, the number of active vessels decreased.

POLICY UPDATES

In June 2015, the MAFMC approved an amendment to the mackerel, squid and butterfish FMP to protect deep sea corals from the impacts of bottom-tending fishing gear in the Mid-Atlantic. If approved by the Secretary of Commerce, the amendment will create “deep sea coral zones” in areas where corals have been observed or where they are likely to occur. Within these zones, fishermen will not be allowed to use any type of bottom-tending fishing gear, such as trawls, dredges, bottom longlines and traps. In total, the areas proposed for deep sea coral zone designation encompass more than 38,000 square miles.

The measures approved by the MAFMC include the designation of fifteen “discrete coral zones,” which are areas of known or highly likely coral presence. Most of these areas are located around underwater canyons or slope areas along the continental shelf edge. In addition, the MAFMC voted to establish a “broad coral zone” encompassing a much larger area beginning around the 450-meter depth contour and extending out to the 200-mile limit of the U.S. exclusive economic zone (EEZ).

The MAFMC approved an exemption from gear restrictions for the red crab fishery. This exemption would apply indefinitely in the broad zones and for at least two years in the discrete zones. The MAFMC also approved a provision that would allow vessel transit through or across all deep sea coral zones with a requirement that the vessel’s fishing gear be stowed during transit. The amendment would also require the use of Vessel Monitoring Systems for all Illex squid moratorium vessels regardless of whether fishing activity is occurring within or outside any proposed deep sea coral zones.

COMMERCIAL FISHERIES

In 2014, commercial fishermen in the Mid-Atlantic Region landed 591 million pounds of fin fish and shellfish, earning \$471 million in landings revenue. Landings revenue was dominated by sea scallop (\$126 million) and blue crab (\$91 million). These species commanded ex-vessel prices of \$12.28 and \$1.68 per pound, respectively, and made up 46 percent of total landings revenue in the Mid-Atlantic Region. Virginia (\$168 million) and New Jersey (\$152 million) had the highest landings revenue in the region in 2014. Delaware had the lowest landings revenue (\$7 million). In terms of pounds landed, Virginia (388 million pounds) had the highest landings, followed by New Jersey (124 million pounds). Delaware had the lowest landings at 4 million pounds.

Key Mid-Atlantic Region Commercial Species

- American lobster
- Atlantic surfclam
- Blue crab
- Eastern oyster
- Menhaden
- Quahog clam
- Sea scallop
- Squid
- Striped bass
- Summer flounder

Economic Impacts

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.¹ In 2014, the Mid-Atlantic Region’s seafood industry generated \$6.9 billion in sales impacts in New Jersey, \$6.9 billion in sales impacts in New York, \$1.5 billion in sales impacts in Maryland, \$1.3 billion in sales impacts in Virginia, and \$73 million in sales impacts in Delaware. The largest job impacts were generated in New York (57,000 jobs) and New Jersey (44,000 jobs). The largest income (\$1.5 billion) and value-added (\$2.5 billion) impacts were generated in New Jersey. The smallest impacts were generated in Delaware with 500 jobs, \$14 million in income, and \$24 million in value-added impacts.

The sector that generated the greatest employment impacts by state was the retail sector with 29,000 jobs in New York. More sales impacts were generated by importers in New York than any other sector in any another state in the region at \$5.3 billion. The greatest value-added impacts were also generated by importers in New York (\$1.6 billion).

Landings Revenue

Landings revenue in the Mid-Atlantic Region totaled \$471 million in 2014. This was a 7 percent increase (a 9% decrease in real terms after adjusting for inflation) from 2005 levels and an 8 percent increase from 2013. Virginia (\$168 million) and New Jersey (\$152 million) had the highest landings revenue in the region, while Delaware had the lowest (\$7 million). Totalling \$353 million in 2014, shellfish revenue experienced a 4 percent increase (an 11% decrease in real terms) from 2005 to 2014 and a 14 percent increase from 2013 to 2014. New Jersey earned the most from shellfish (\$127 million), followed by Virginia (\$114 million) and Maryland (\$73 million). Virginia and New Jersey earned the most from finfish landings revenue, \$55 million and \$25 million, respectively.

Sea scallop (\$126 million) and blue crab (\$91 million) had the highest landings revenue in the Mid-Atlantic Region in 2014. From 2005 to 2014, species or species groups with large increases in landings revenue included oysters (696%, 577% in real terms), striped bass (38%, 18% in real terms), and quahog clam (67%,

¹ 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).

42% in real terms). Key species or species groups for which landings revenues increased between 2013 and 2014 included oysters (43%), sea scallop (25%), and blue crab (5%); all other species experienced landings revenue declines. Surging production in Virginia from aquaculture operations accounted for the majority of oyster landings revenue growth. Notably large decreases in landings revenue between 2005 and 2014 were experienced by Atlantic surfclam (-53%, -60% in real terms), American lobster (-45%, -53% in real terms), and sea scallop (-31%, -41% in real terms). Species or species groups with large decreases in landings revenue between 2013 and 2014 included squid (-31%), summer flounder (-23%), and striped bass (-21%).

Landings

Fishermen in the Mid-Atlantic Region landed 591 million pounds of finfish and shellfish in 2014. This was a 17 percent decrease from 2005 levels and a 2 percent increase from 2013. Virginia (388 million pounds) and New Jersey (124 million pounds) had the highest landings while Delaware had the lowest (4 million pounds). Finfish landings contributed 77 percent of total landings in the Mid-Atlantic Region (454 million pounds) in 2014. Finfish landings experienced a 12 percent decrease from 2005 to 2014 and a 2 percent increase from 2013. Shellfish landings experienced a 28 percent decrease from 2005 to 2014 and were virtually unchanged from 2013 levels.

Menhaden had the highest annual landings (378 million pounds) in the Mid-Atlantic in 2014 and accounted for 64 percent of total landings in the region. From 2005 to 2014, species or species groups with large increases in landings included oysters (339%) and quahog clam (24%). Species or species groups with large increases in landings between 2013 and 2014 included oysters (22%) and sea scallop (16%). Sea scallop (-58%), Atlantic surfclam (-58%), American lobster (-49%), and summer flounder (-41%) experienced sizable declines in landings between 2005 and 2014. Sea scallop landings declined during this 10-year period primarily due to a 35 percent reduction in the catch limit that was implemented in 2012 to protect young sea scallops and prevent localized overfishing. Species or species groups with large decreases in landings from 2013 and 2014 include squid (-44%) and summer flounder (-38%).

Commercial Fisheries Facts

Landings Revenue

- On average between 2005 and 2014, the key species or species groups accounted for 84 percent of total revenue, generating \$389 million in the Mid-Atlantic Region.
- Sea scallop had higher landings revenues than any other species or species group, averaging \$158 million in landings revenue from 2005 to 2014.

Landings

- Key species or species groups contributed an average of 85 percent annually to total landings between 2005 and 2014, with an annual average of 600 million pounds.
- Menhaden contributed the most to landings in the region, averaging 431 million pounds from 2005 to 2014.

Prices

- Sea scallop had the highest average annual ex-vessel price per pound from 2005 to 2014: \$8.40.
- Menhaden had the lowest average annual ex-vessel price per pound from 2005 to 2014: \$0.07.

Prices

The ex-vessel prices for all Mid-Atlantic key species and species groups in 2014 (seven of the species in real terms) were higher than their 10-year average. Ex-vessel prices for oysters (81%, 54% in real terms), blue crab (68%, 42% in real terms), and sea scallop (66%, 41% in real terms) increased the most between 2005 and 2014. Relative to ex-vessel prices in 2013, summer flounder (24%) and squid (23%) had the greatest increases.

RECREATIONAL FISHERIES

In 2014, 2.2 million recreational anglers took 14.3 million fishing trips in the Mid-Atlantic Region. About 94 percent of these anglers were residents of a regional coastal county. Of the total fishing trips taken, 53 percent of them were taken from the private boat sector and another 38 percent from the shore sector. Summer flounder was the most frequently caught species or species group with 17.6 million fish caught in 2014. This figure represented 29 percent of total fish caught in the Region.

Economic Impacts and Expenditures

The contribution of recreational fishing activities² in the

Mid-Atlantic Region are reported in terms of economic impacts at the state level (employment, sales, income and value-added impacts) and expenditures on fishing trips and durable equipment at the regional level. Employment impacts in New Jersey were the highest in the region with approximately 19,962 full- and part-time jobs generated by recreational fishing activities in the state. New York (9,561 jobs) and Maryland (7,721 jobs) followed in terms of employment impacts.

Key Mid-Atlantic Region Recreational Species

- Atlantic croaker
- Bluefish
- Black seabass
- Scup
- Spot
- Striped bass
- Summer flounder
- Tautog
- Winter flounder
- Weakfish drum

In addition to jobs, the contribution of recreational fishing activities to the Mid-Atlantic Region's economy can be measured in terms of sales impacts and the contribution of these activities to gross domestic product (value-added impacts). In 2014, sales impacts were the highest in New Jersey (\$2 billion in sales impacts), followed by New York (\$1 billion). Value-added impacts were the highest in New Jersey (\$1.5 billion in value added impacts), followed by New York (\$0.7 billion).

The total saltwater fishing trip and durable equipment expenditures were \$4 billion across the Mid-Atlantic Region in 2014. Approximately 80 percent of these expenditures were related to durable equipment purchases. The largest durable goods expenditures were for boat expenses (\$1.9 billion), followed by fishing tackle (\$841.1 million) and other equipment (\$285.8 million). Fishing trip-related expenditures by the Mid-Atlantic Region's non-residents totaled \$266.6 million, of which the greatest portion can be attributed to trips in the private boat sector (\$117.1 million). Residents of the Mid-Atlantic Region spent \$530.2 million on trip-related expenses with the greatest of these expenses related to the private boat sector (\$308 million).

Participation

There were 2.2 million recreational anglers who fished in the Mid-Atlantic Region in 2014. This was a 31 percent decrease from 2005 (3.3 million anglers). These anglers

were Mid-Atlantic Region residents from either a coastal (2.1 million anglers) or non-coastal county (130,000 anglers). About 94 percent of total anglers in 2014 were residents of a coastal county. Coastal county angler participation in 2014 decreased 30 percent from 2005 (3 million anglers) and increased 1 percent between 2013 and 2014. Non-coastal county angler participation decreased 48 percent from 2005 (252,000 anglers) and decreased 6 percent from 2013 (138,000 anglers).

Recreational Fishing Facts

Participation

- An average of 2.7 million anglers fished in the Mid-Atlantic Region annually from 2005 to 2014.
- Residents of coastal counties within the Mid-Atlantic Region accounted for an average of 93 percent of total anglers annually during the 10-year period.

Fishing trips

- In the Mid-Atlantic Region, an average of 18 million fishing trips were taken annually from 2005 to 2014.
- Private or rental boat and shore-based fishing trips accounted for an annual average of 10.1 million and 6.7 million fishing trips, respectively, from 2005 to 2014.

Harvest and Release

- Summer flounder was the most commonly caught key species or species group, averaging 19.3 million fish over the 10-year period. Croaker (16.1 million fish) and spot (9 million fish) were the next most frequently caught.
- Of the 10 commonly caught key species or species groups, nine were released more of 10 than harvested during this period.

Fishing Trips

Recreational fishermen took 14.3 million fishing trips in the Mid-Atlantic Region in 2014. This was a 31 percent decrease from 2005 and a 1 percent increase from 2013. Approximately 53 percent of the saltwater trips were from the private boat sector. The other most popular mode of fishing was shore with 38 percent of trips in 2014.

Harvest and Release

The Mid-Atlantic Region's species and species groups caught most frequently in 2014 were summer flounder (17.6 million fish), drum (Atlantic croaker, 10.8 million

² Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/Marine-Angler-Durable-Expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

fish), and drum (spot, 7.4 million fish). Between 2005 and 2014, nine of the Mid-Atlantic Region's key species or species groups showed decreases in catch totals, with the largest decreases occurring among weakfish drum (-92%), winter flounder (-84%), and drum (Atlantic croaker, -52%). Increases in the number of fish caught between 2005 and 2014 were observed in wrasses (tautog, 104%).

MARINE ECONOMY

Across all sectors of the economy in the Mid-Atlantic Region,³ about 17 million full- and part-time employees were employed by about 1.1 million establishments in 2013. Annual payroll totaled \$945 billion. Combined employee compensation in the Mid-Atlantic Region totaled \$1.5 trillion. The combined gross state product of all states totaled about \$2.7 trillion.⁴

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.⁵ 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 national CFLQ is 1. If a state CFLQ is less than 1, then less commercial fishing occurs in this state than the national average. If a state CFLQ is greater than 1, then more commercial fishing occurs in this state than the national average.

In 2013, the CFLQ for New Jersey was the highest in the region at 1.02. New Jersey's CFLQ suggests that the level of employment in commercial fishing-related industries in this state is approximately 1.02 times higher than the level of employment in these industries nationwide. The 2013 CFLQ in Virginia was second highest in the Region at 0.68.

Seafood Sales and Processing

The number of non-employer firms (businesses that have no paid employees and are subject to federal income tax) engaged in seafood product preparation and packaging in the Mid-Atlantic Region increased 59 percent to 331 firms in 2013, relative to 2005. The greatest number of these non-employer firms was located in New York (150). Annual receipts increased 83 percent to about \$22 million in 2013 (a 41% increase in real terms). Employer

establishments engaged in seafood product preparation and packaging decreased 34 percent from 2005 to 2013, to 65 firms. The biggest number of Mid-Atlantic Region employer firms in this sector was located in Virginia (18). The number of employees decreased 46 percent to 2,041. Annual payroll decreased 18 percent to about \$89 million in 2013 (a 37% decrease in real terms).

Employer establishments in the wholesale seafood sales sector decreased 4 percent from 2005 to 2013, to 481. The largest number of wholesaling establishments was located in New York (264). The number of employees decreased 11 percent to 3,821. Annual payroll increased 2 percent to about \$170 million in 2013 (a 21% decrease in real terms).

The number of non-employer firms in the retail seafood sector in the Mid-Atlantic Region decreased 3 percent to 468 firms in 2013, relative to 2005. The greatest number of these non-employer firms was located in New York (197). Annual receipts decreased 25 percent to about \$38 million in 2013 (a 43% decrease in real terms). Employer establishments engaged in seafood retail decreased 4 percent from 2005 to 2013, to 672 firms. The biggest number of Mid-Atlantic Region employer firms in this sector was located in New York (399). The number of employees increased 2 percent to 3,103. Annual payroll increased 32 percent to about \$77 million in 2013 (a 1% increase in real terms).

Transport, Support and Marine Operations

The size of the Transport, Support and Marine Operations sectors in the Mid-Atlantic Region is difficult to assess because much of the state-level data is suppressed for confidentiality purposes. It is clear, however, that these sectors play an important role in the regional economy. For example, there were 932 establishments classified as marinas, employing 4,926 workers and spending \$203 million on payroll in 2013 across all five states in the region. The Navigational Services to Shipping sector included 88 establishments, employment of 1,423 workers, and payroll of \$117 million across all Mid-Atlantic states. In addition, the Marine Cargo Handling sector consisted of 20 establishments employing 6,912 workers and contributing \$539 million in payroll in New Jersey alone.

³ Unless otherwise stated, data is from the U.S. Census Bureau, <http://censtats.census.gov/> (accessed September 15, 2014).

⁴ 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).

⁵ U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

Tables | Mid-Atlantic Region



Mid-Atlantic Region | Commercial Fisheries

2014 Economic Impacts of the Mid-Atlantic Seafood Industry (thousands of dollars)

| | Landings Revenue | With Imports | | | | Without Imports | | | |
|------------|------------------|--------------|-----------|-----------|-------------|-----------------|---------|---------|-------------|
| | | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Delaware | 6,587 | 456 | 72,919 | 13,996 | 23,878 | 285 | 32,257 | 6,832 | 10,956 |
| Maryland | 90,252 | 14,636 | 1,461,779 | 378,307 | 577,856 | 8,332 | 433,330 | 159,546 | 217,284 |
| New Jersey | 151,930 | 44,433 | 6,862,897 | 1,529,212 | 2,486,353 | 7,291 | 580,593 | 192,946 | 277,011 |
| New York | 53,848 | 56,735 | 6,858,434 | 1,466,405 | 2,426,360 | 4,302 | 197,521 | 68,630 | 95,997 |
| Virginia | 168,239 | 17,253 | 1,256,929 | 396,372 | 568,765 | 14,618 | 798,612 | 304,860 | 412,727 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 440,045 | 374,180 | 423,232 | 452,636 | 435,847 | 521,140 | 552,315 | 510,297 | 435,977 | 470,855 |
| Finfish & Other | 101,499 | 106,388 | 103,874 | 91,455 | 101,902 | 111,551 | 119,981 | 131,010 | 125,391 | 117,824 |
| Shellfish | 338,547 | 267,793 | 319,358 | 361,181 | 333,946 | 409,589 | 432,334 | 379,287 | 310,585 | 353,031 |
| Key Species | | | | | | | | | | |
| American lobster | 6,696 | 9,105 | 8,744 | 7,213 | 5,989 | 6,265 | 4,692 | 5,271 | 4,063 | 3,703 |
| Atlantic surfclam | 27,084 | 27,241 | 32,479 | 30,019 | 26,426 | 19,940 | 18,737 | 16,501 | 13,688 | 12,850 |
| Blue crab | 71,073 | 55,628 | 69,498 | 80,912 | 80,019 | 127,737 | 101,630 | 101,942 | 86,787 | 90,710 |
| Eastern oyster | 6,703 | 6,343 | 9,039 | 11,205 | 9,356 | 12,038 | 13,043 | 20,231 | 37,230 | 53,379 |
| Menhaden | 28,188 | 25,104 | 29,918 | 24,457 | 28,581 | 40,315 | 39,666 | 40,043 | 33,780 | 33,177 |
| Quahog clam | 20,773 | 20,230 | 23,601 | 35,853 | 23,022 | 28,880 | 27,607 | 29,502 | 35,902 | 34,733 |
| Sea scallop | 181,327 | 121,121 | 147,053 | 165,916 | 161,814 | 184,288 | 227,443 | 168,921 | 100,411 | 125,945 |
| Squid | 9,163 | 7,937 | 7,443 | 7,724 | 7,158 | 12,031 | 20,646 | 17,819 | 12,078 | 8,306 |
| Striped Bass | 11,335 | 9,958 | 10,993 | 10,671 | 11,459 | 9,450 | 10,520 | 14,622 | 19,792 | 15,679 |
| Summer flounder | 13,615 | 13,432 | 10,855 | 9,693 | 9,980 | 12,849 | 15,614 | 17,194 | 17,131 | 13,232 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 708,724 | 690,884 | 749,980 | 687,788 | 694,960 | 812,857 | 797,355 | 759,928 | 582,307 | 591,201 |
| Finfish & Other | 517,880 | 510,978 | 556,720 | 482,151 | 490,235 | 578,845 | 575,446 | 568,905 | 445,270 | 454,444 |
| Shellfish | 190,843 | 179,906 | 193,259 | 205,638 | 204,725 | 234,012 | 221,909 | 191,022 | 137,037 | 136,756 |
| Key Species | | | | | | | | | | |
| American lobster | 1,585 | 1,772 | 1,604 | 1,520 | 1,576 | 1,549 | 1,086 | 1,271 | 980 | 811 |
| Atlantic surfclam | 50,921 | 46,631 | 53,952 | 48,099 | 41,692 | 30,946 | 30,272 | 26,535 | 22,788 | 21,430 |
| Blue crab | 70,983 | 61,862 | 65,070 | 67,975 | 76,097 | 119,286 | 104,414 | 88,964 | 55,424 | 53,969 |
| Eastern oyster | 1,202 | 962 | 2,388 | 1,778 | 1,438 | 1,770 | 2,038 | 2,749 | 4,311 | 5,274 |
| Menhaden | 412,672 | 400,662 | 472,086 | 397,537 | 395,469 | 499,578 | 496,829 | 492,532 | 366,343 | 377,518 |
| Quahog clam | 3,735 | 3,568 | 4,115 | 5,246 | 3,255 | 3,685 | 3,551 | 3,730 | 4,586 | 4,617 |
| Sea scallop | 24,526 | 18,747 | 22,793 | 24,355 | 25,646 | 23,998 | 23,385 | 17,627 | 8,855 | 10,256 |
| Squid | 12,260 | 10,520 | 8,607 | 8,241 | 8,310 | 26,822 | 33,333 | 26,069 | 14,549 | 8,151 |
| Striped Bass | 5,706 | 4,741 | 5,477 | 5,693 | 5,852 | 5,582 | 5,461 | 5,589 | 4,709 | 4,762 |
| Summer flounder | 8,360 | 6,608 | 4,725 | 4,260 | 5,137 | 6,384 | 8,672 | 7,795 | 8,010 | 4,970 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|------|------|------|------|------|------|------|------|-------|-------|
| American lobster | 4.22 | 5.14 | 5.45 | 4.75 | 3.80 | 4.04 | 4.32 | 4.15 | 4.14 | 4.57 |
| Atlantic surfclam | 0.53 | 0.58 | 0.60 | 0.62 | 0.63 | 0.64 | 0.62 | 0.62 | 0.60 | 0.60 |
| Blue crab | 1.00 | 0.90 | 1.07 | 1.19 | 1.05 | 1.07 | 0.97 | 1.15 | 1.57 | 1.68 |
| Eastern oyster | 5.58 | 6.60 | 3.79 | 6.30 | 6.51 | 6.80 | 6.40 | 7.36 | 8.64 | 10.12 |
| Menhaden | 0.07 | 0.06 | 0.06 | 0.06 | 0.07 | 0.08 | 0.08 | 0.08 | 0.09 | 0.09 |
| Quahog clam | 5.56 | 5.67 | 5.74 | 6.83 | 7.07 | 7.84 | 7.77 | 7.91 | 7.83 | 7.52 |
| Sea scallop | 7.39 | 6.46 | 6.45 | 6.81 | 6.31 | 7.68 | 9.73 | 9.58 | 11.34 | 12.28 |
| Squid | 0.75 | 0.75 | 0.86 | 0.94 | 0.86 | 0.45 | 0.62 | 0.68 | 0.83 | 1.02 |
| Striped Bass | 1.99 | 2.10 | 2.01 | 1.87 | 1.96 | 1.69 | 1.93 | 2.62 | 4.20 | 3.29 |
| Summer flounder | 1.63 | 2.03 | 2.30 | 2.28 | 1.94 | 2.01 | 1.80 | 2.21 | 2.14 | 2.66 |

2014 Economic Impacts of the Mid-Atlantic Recreational Fishing Expenditures (thousands of dollars, trips)

| | Trips | #Jobs | Sales | Income | Value Added |
|------------|-------|--------|-----------|---------|-------------|
| Delaware | 868 | 1,562 | 142,279 | 61,959 | 98,343 |
| Maryland | 2,473 | 7,721 | 726,850 | 338,785 | 513,107 |
| New Jersey | 4,869 | 19,962 | 2,036,835 | 956,242 | 1,456,978 |
| New York | 3,955 | 9,561 | 976,928 | 466,515 | 718,728 |
| Virginia | 2,182 | 5,218 | 473,659 | 212,615 | 335,482 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 841,101 |
| For-Hire | 76,521 | 109,651 | Other Equipment | 285,788 |
| Private Boat | 117,073 | 307,983 | Boat Expenses | 1,898,082 |
| Shore | 72,962 | 112,595 | Vehicle Expenses | 194,767 |
| Total | 266,556 | 530,229 | Second Home Expenses | 15,083 |
| | | | Total Durable Expenditures | 3,234,821 |
| Total State Trip and Durable Goods Expenditures | | | | 4,031,606 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 3,002 | 2,876 | 3,234 | 2,823 | 2,437 | 2,598 | 2,244 | 2,092 | 2,081 | 2,111 |
| Non-Coastal | 252 | 224 | 212 | 197 | 186 | 177 | 146 | 175 | 138 | 130 |
| Out-of-State | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Total Anglers | 3,254 | 3,100 | 3,446 | 3,020 | 2,623 | 2,775 | 2,390 | 2,267 | 2,219 | 2,241 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| For-Hire | 1,270 | 1,338 | 1,690 | 1,145 | 1,110 | 874 | 1,050 | 952 | 1,365 | 1,259 |
| Private | 11,900 | 11,862 | 12,371 | 11,566 | 9,709 | 9,367 | 8,512 | 7,676 | 6,852 | 7,633 |
| Shore | 7,667 | 7,370 | 8,125 | 8,004 | 6,196 | 6,346 | 6,412 | 5,806 | 6,000 | 5,455 |
| Total Trips | 20,837 | 20,570 | 22,186 | 20,715 | 17,015 | 16,587 | 15,974 | 14,434 | 14,217 | 14,347 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Black seabass | H | 996 | 1,118 | 1,302 | 927 | 1,334 | 1,317 | 533 | 1,134 | 786 | 999 |
| | R | 5,412 | 5,737 | 6,404 | 8,475 | 6,273 | 6,459 | 3,204 | 7,666 | 5,113 | 4,832 |
| Bluefish | H | 4,671 | 3,902 | 4,946 | 3,517 | 2,934 | 2,558 | 2,467 | 2,640 | 2,167 | 3,215 |
| | R | 6,641 | 5,697 | 8,013 | 7,212 | 4,457 | 3,937 | 4,243 | 4,269 | 2,461 | 4,036 |
| Drum (Atlantic croaker) | H | 10,494 | 9,252 | 8,582 | 9,980 | 7,308 | 6,020 | 3,992 | 4,789 | 6,581 | 5,218 |
| | R | 12,242 | 7,419 | 11,026 | 12,910 | 9,404 | 6,232 | 5,389 | 8,429 | 10,520 | 5,623 |
| Drum (spot) | H | 4,769 | 6,659 | 11,997 | 6,557 | 4,347 | 3,699 | 4,032 | 2,850 | 5,815 | 5,520 |
| | R | 4,755 | 2,885 | 3,940 | 4,491 | 2,238 | 2,573 | 2,609 | 2,642 | 5,802 | 1,833 |
| Drum (weakfish) | H | 1,103 | 555 | 333 | 372 | 38 | 14 | 7 | 158 | 48 | 20 |
| | R | 1,969 | 2,051 | 1,037 | 1,987 | 178 | 458 | 467 | 957 | 212 | 215 |
| Porgies (scup) | H | 993 | 2,005 | 1,698 | 1,544 | 1,637 | 2,736 | 770 | 713 | 1,242 | 1,178 |
| | R | 2,254 | 3,543 | 2,501 | 3,172 | 2,292 | 2,413 | 1,041 | 1,628 | 1,967 | 1,732 |
| Striped bass | H | 1,602 | 2,027 | 1,776 | 1,682 | 1,388 | 1,406 | 1,655 | 949 | 1,421 | 1,287 |
| | R | 8,032 | 9,227 | 7,729 | 4,789 | 3,802 | 3,468 | 3,781 | 3,411 | 4,737 | 4,632 |
| Summer flounder | H | 3,337 | 3,197 | 2,544 | 1,723 | 1,563 | 1,227 | 1,511 | 1,967 | 2,060 | 1,996 |
| | R | 20,358 | 14,547 | 16,577 | 18,432 | 21,371 | 21,400 | 18,467 | 13,317 | 12,160 | 15,602 |
| Winter flounder | H | 133 | 325 | 107 | 44 | 76 | 55 | 93 | 44 | 6 | 38 |
| | R | 221 | 189 | 41 | 32 | 136 | 103 | 126 | 36 | 33 | 20 |
| Wrasses (tautog) | H | 279 | 678 | 727 | 669 | 693 | 762 | 351 | 166 | 237 | 511 |
| | R | 859 | 2,006 | 2,201 | 1,978 | 1,912 | 2,317 | 1,529 | 1,109 | 1,221 | 1,810 |

¹ NA = data are not available because out-of-state resident information is collected for individual states but does not specify whether an angler resides in a region.

Tables | Delaware



Delaware | Commercial Fisheries

2014 Economic Impacts of the Delaware Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|--------|--------|-------------|-----------------|--------|--------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 456 | 72,919 | 13,996 | 23,878 | 285 | 32,257 | 6,832 | 10,956 |
| Commercial Harvesters | 139 | 12,069 | 2,872 | 3,889 | 139 | 12,069 | 2,872 | 3,889 |
| Seafood Processors & Dealers | 30 | 5,322 | 936 | 1,800 | 26 | 4,673 | 822 | 1,581 |
| Importers | 125 | 34,479 | 5,526 | 10,511 | - | - | - | - |
| Seafood Wholesalers & Distributors | 38 | 5,120 | 1,947 | 2,321 | 18 | 2,361 | 898 | 1,070 |
| Retail | 123 | 15,930 | 2,716 | 5,357 | 101 | 13,155 | 2,240 | 4,417 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Total Revenue | 6,113 | 5,692 | 7,931 | 6,900 | 7,543 | 7,845 | 7,092 | 8,464 | 7,422 | 6,587 |
| Finfish & Other | 1,273 | 1,330 | 1,300 | 1,100 | 1,068 | 1,074 | 1,329 | 1,220 | 1,794 | 1,526 |
| Shellfish | 4,840 | 4,361 | 6,631 | 5,801 | 6,475 | 6,772 | 5,763 | 7,244 | 5,627 | 5,061 |

Key Species

| | | | | | | | | | | |
|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| American eel | 100 | 275 | 292 | 190 | 134 | 206 | 274 | 159 | 244 | 171 |
| Black sea bass | 157 | 190 | 198 | 156 | 25 | 8 | 2 | - | 2 | NA |
| Blue crab | 3,429 | 2,961 | 5,329 | 4,605 | 5,435 | 5,957 | 4,819 | 6,664 | 4,576 | 3,762 |
| Eastern oyster | 485 | 459 | 490 | 410 | 334 | 404 | 347 | 345 | 407 | 420 |
| Quahog clam | 220 | 193 | 181 | 127 | 117 | 110 | 143 | 123 | 177 | 131 |
| Sea scallop | 102 | 99 | NA | 256 | 173 | NA | NA | NA | NA | NA |
| Spot | 98 | 7 | 57 | 40 | 49 | 50 | 66 | 16 | 64 | 104 |
| Striped bass | 494 | 380 | 300 | 403 | 327 | 400 | 412 | 470 | 766 | 498 |
| Weakfish | 82 | 32 | 31 | 18 | 5 | 4 | 2 | 56 | 16 | 8 |
| Whelks | NA | 601 | 540 | 352 | 389 | 272 | 361 | 83 | 414 | 626 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Total Landings | 4,851 | 4,380 | 5,346 | 4,706 | 5,011 | 5,214 | 4,921 | 5,640 | 4,048 | 3,606 |
| Finfish & Other | 1,470 | 1,156 | 1,102 | 817 | 1,154 | 851 | 1,157 | 935 | 1,265 | 1,344 |
| Shellfish | 3,381 | 3,224 | 4,244 | 3,890 | 3,857 | 4,363 | 3,764 | 4,705 | 2,783 | 2,262 |

Key Species

| | | | | | | | | | | |
|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| American eel | 110 | 120 | 131 | 80 | 60 | 69 | 91 | 54 | 83 | 56 |
| Black sea bass | 73 | 87 | 73 | 61 | 6 | 3 | 4 | - | 4 | NA |
| Blue crab | 2,924 | 2,856 | 3,799 | 3,508 | 3,414 | 4,110 | 3,502 | 4,571 | 2,488 | 1,893 |
| Eastern oyster | 84 | 75 | 80 | 67 | 67 | 71 | 62 | 60 | 71 | 73 |
| Quahog clam | 69 | 60 | 44 | 36 | 31 | 30 | 39 | 32 | 43 | 40 |
| Sea scallop | 13 | 16 | NA | 38 | 25 | NA | NA | NA | NA | NA |
| Spot | 155 | 8 | 62 | 32 | 61 | 60 | 82 | 18 | 73 | 107 |
| Striped bass | 174 | 137 | 143 | 189 | 184 | 185 | 185 | 190 | 187 | 167 |
| Weakfish | 71 | 18 | 25 | 11 | 3 | 2 | 1 | 29 | 9 | 4 |
| Whelks | NA | 203 | 288 | 217 | 313 | 138 | 131 | 29 | 156 | 229 |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------|------|------|------|------|------|------|------|------|------|------|
| American eel | 0.91 | 2.28 | 2.22 | 2.38 | 2.24 | 3.00 | 3.03 | 2.93 | 2.94 | 3.06 |
| Black sea bass | 2.15 | 2.18 | 2.73 | 2.57 | 4.31 | 2.63 | 0.50 | 0.85 | 0.50 | NA |
| Blue crab | 1.17 | 1.04 | 1.40 | 1.31 | 1.59 | 1.45 | 1.38 | 1.46 | 1.84 | 1.99 |
| Eastern oyster | 5.76 | 6.10 | 6.14 | 6.09 | 4.97 | 5.67 | 5.56 | 5.76 | 5.71 | 5.71 |
| Quahog clam | 3.18 | 3.22 | 4.09 | 3.57 | 3.79 | 3.69 | 3.72 | 3.84 | 4.07 | 3.24 |
| Sea scallop | 8.08 | 6.27 | NA | 6.81 | 6.80 | NA | NA | NA | NA | NA |
| Spot | 0.63 | 0.97 | 0.92 | 1.24 | 0.81 | 0.84 | 0.81 | 0.89 | 0.88 | 0.97 |
| Striped bass | 2.84 | 2.78 | 2.09 | 2.13 | 1.77 | 2.16 | 2.22 | 2.47 | 4.09 | 2.99 |
| Weakfish | 1.16 | 1.76 | 1.27 | 1.75 | 1.93 | 1.56 | 2.01 | 1.95 | 1.85 | 1.93 |
| Whelks | NA | 2.96 | 1.88 | 1.62 | 1.24 | 1.97 | 2.76 | 2.89 | 2.66 | 2.73 |

¹ NA = these data are confidential thus not disclosable.

2014 Economic Impacts of Delaware Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|--------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 87 | 8,589 | 3,457 | 4,852 |
| | Private Boat | 139 | 13,778 | 4,546 | 7,433 |
| | Shore | 271 | 23,570 | 8,159 | 13,324 |
| Total Durable Expenditures | | 1,065 | 96,342 | 45,797 | 72,734 |
| Total State Economic Impacts | | 1,562 | 142,279 | 61,959 | 98,343 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 36,125 |
| For-Hire | 4,383 | 1,220 | Other Equipment | 12,117 |
| Private Boat | 5,064 | 8,881 | Boat Expenses | 69,440 |
| Shore | 13,881 | 7,201 | Vehicle Expenses | 6,697 |
| Total | 23,328 | 17,302 | Second Home Expenses | 0 |
| | | | Total Durable Expenditures | 124,379 |
| Total State Trip and Durable Goods Expenditures | | | | 165,009 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 120 | 137 | 150 | 134 | 114 | 128 | 129 | 111 | 82 | 93 |
| Non-Coastal | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Out-of-State | 191 | 205 | 224 | 182 | 173 | 165 | 190 | 151 | 97 | 146 |
| Total Anglers | 311 | 342 | 374 | 316 | 287 | 293 | 319 | 262 | 179 | 239 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|------|------|------|------|------|------|
| For-Hire | 42 | 62 | 71 | 56 | 44 | 21 | 18 | 21 | 37 | 41 |
| Private | 553 | 595 | 721 | 528 | 487 | 408 | 511 | 481 | 349 | 363 |
| Shore | 431 | 427 | 459 | 444 | 379 | 391 | 397 | 374 | 378 | 464 |
| Total Trips | 1,026 | 1,084 | 1,251 | 1,028 | 910 | 820 | 926 | 876 | 764 | 868 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------|---|------|------|-------|------|------|------|------|------|------|------|
| Atlantic mackerel | H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | R | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 |
| Black seabass | H | 68 | 114 | 93 | 22 | 37 | 22 | 43 | 40 | 37 | 24 |
| | R | 276 | 328 | 584 | 464 | 293 | 232 | 211 | 205 | 249 | 228 |
| Bluefish | H | 128 | 97 | 154 | 69 | 98 | 32 | 46 | 35 | 24 | 127 |
| | R | 190 | 289 | 539 | 167 | 167 | 58 | 128 | 118 | 70 | 325 |
| Drum (Atlantic croaker) | H | 825 | 764 | 359 | 370 | 452 | 76 | 92 | 88 | 232 | 413 |
| | R | 675 | 937 | 672 | 602 | 537 | 229 | 88 | 447 | 770 | 665 |
| Drum (weakfish) | H | 19 | 11 | 4 | 4 | 6 | 0 | 0 | 5 | 7 | 3 |
| | R | 105 | 95 | 23 | 61 | 4 | 12 | 6 | 85 | 23 | 22 |
| Striped bass | H | 20 | 20 | 8 | 27 | 20 | 16 | 18 | 25 | 19 | 9 |
| | R | 251 | 248 | 248 | 261 | 145 | 65 | 110 | 110 | 84 | 185 |
| Summer flounder | H | 73 | 88 | 108 | 35 | 87 | 53 | 66 | 45 | 58 | 93 |
| | R | 795 | 445 | 1,072 | 604 | 964 | 618 | 616 | 253 | 238 | 292 |
| White perch | H | 36 | 69 | 34 | 40 | 64 | 187 | 112 | 70 | 119 | 106 |
| | R | 105 | 194 | 190 | 243 | 121 | 397 | 272 | 187 | 369 | 65 |
| Wrasses (tautog) | H | 61 | 111 | 100 | 102 | 120 | 57 | 45 | 47 | 39 | 50 |
| | R | 233 | 193 | 267 | 164 | 224 | 196 | 88 | 107 | 99 | 76 |
| Yellowfin tuna | H | 4 | 6 | 0 | 1 | 0 | 0 | 0 | 0 | 1 | 1 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

¹ Data is not available because all Delaware residents are considered coastal county residents.² In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Delaware | Marine Economy

Delaware's State Economy (% of national total)^{1,2}

| | # Establishments | # Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ³ |
|---------|------------------|----------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 25,319 (0.3%) | 392,840 (0.3%) | 16.88 (0.4%) | 24.18 (0.3%) | 52.90 (0.4%) | ds |
| 2013 | 24,151 (0.3%) | 382,128 (0.3%) | 19.54 (0.3%) | 27.97 (0.3%) | 60.82 (0.4%) | ds |
| %Change | -4.8 | -2.8 | 13.6 | 13.6 | 13.0 | NA |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|------|-------|------|------|-------|-------|-------|------|
| Seafood product prep. & packaging | Firms | 3 | 3 | ds | 3 | ds | ds | ds | ds | ds |
| | Receipts | 64 | 214 | ds | 27 | ds | ds | ds | ds | ds |
| Seafood sales, retail | Firms | 12 | 9 | 12 | 9 | 10 | 9 | 9 | 11 | 8 |
| | Receipts | 1,523 | 835 | 1,025 | 418 | 813 | 1,107 | 1,226 | 1,333 | 520 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Establishments | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| | Employees | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Payroll | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Seafood sales, wholesale | Establishments | 3 | 3 | 3 | 6 | 7 | 7 | 7 | 7 | 9 |
| | Employees | 0 | 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Payroll | 0 | 337 | 0 | 0 | 0 | 0 | 0 | 0 | 3,020 |
| Seafood sales, retail | Establishments | 14 | 17 | 19 | 18 | 16 | 15 | 18 | 16 | 17 |
| | Employees | 138 | 135 | 105 | 0 | 50 | 47 | 49 | 0 | 60 |
| | Payroll | 3,264 | 3,133 | 2,997 | 1,498 | 1,348 | 1,414 | 1,493 | 1,545 | 1,396 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|------|--------|--------|--------|--------|--------|--------|-------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 3 | 3 | 3 | 2 | 2 | 1 | 0 | 0 | 0 |
| | Employees | ds | ds | ds | ds | ds | ds | NA | NA | NA |
| | Payroll | ds | ds | ds | ds | ds | ds | NA | NA | NA |
| Deep sea freight transportation | Establishments | 1 | 0 | 0 | 4 | 4 | 5 | 2 | 1 | 1 |
| | Employees | ds | NA | NA | ds | ds | 120 | ds | ds | ds |
| | Payroll | ds | NA | NA | ds | ds | 10,768 | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 1 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 2 |
| | Employees | ds | NA | NA | NA | NA | ds | NA | NA | ds |
| | Payroll | ds | NA | NA | NA | NA | ds | NA | NA | ds |
| Marinas | Establishments | 16 | 18 | 17 | 19 | 16 | 19 | 17 | 18 | 19 |
| | Employees | ds | ds | 88 | 65 | ds | 65 | ds | 67 | 64 |
| | Payroll | ds | ds | 2,540 | 1,738 | 1,877 | 2,342 | 3,106 | 1,963 | 2,196 |
| Marine cargo handling | Establishments | 4 | 4 | 3 | 3 | 3 | 3 | 3 | 2 | 3 |
| | Employees | ds | 597 | 527 | 629 | ds | 434 | 511 | ds | 565 |
| | Payroll | ds | 18,812 | 19,027 | 19,204 | 16,952 | 16,835 | 19,203 | ds | 20,698 |
| Navigational services to shipping | Establishments | 9 | 8 | 8 | 9 | 8 | 8 | 8 | 8 | 8 |
| | Employees | ds | 75 | 76 | 79 | 85 | 76 | 78 | ds | 82 |
| | Payroll | ds | 4,783 | 4,961 | 5,360 | 5,672 | 5,176 | 5,096 | 3,111 | 5,330 |
| Port & harbor operations | Establishments | 2 | 3 | 2 | 2 | 2 | 3 | 3 | 4 | 3 |
| | Employees | ds | ds | ds | ds | ds | 29 | 44 | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | 1,182 | 1,512 | ds | ds |
| Ship & boat building | Establishments | 1 | 1 | 1 | 2 | 2 | 2 | 3 | 4 | 4 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | 50 | 61 |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | 2,313 | 2,516 |

¹ ds = these data are suppressed.² NA = not applicable.³ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

Tables | Maryland



Maryland | Commercial Fisheries

2014 Economic Impacts of the Maryland Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 14,636 | 1,461,779 | 378,307 | 577,856 | 8,332 | 433,330 | 159,546 | 217,284 |
| Commercial Harvesters | 3,328 | 159,232 | 45,362 | 70,821 | 3,328 | 159,232 | 45,362 | 70,821 |
| Seafood Processors & Dealers | 1,643 | 144,864 | 56,452 | 72,087 | 755 | 66,604 | 25,955 | 33,144 |
| Importers | 2,906 | 799,247 | 128,095 | 243,645 | - | - | - | - |
| Seafood Wholesalers & Distributors | 711 | 93,248 | 31,697 | 42,088 | 239 | 31,312 | 10,644 | 14,133 |
| Retail | 6,048 | 265,188 | 116,701 | 149,214 | 4,010 | 176,181 | 77,585 | 99,186 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|---------|--------|--------|--------|--------|
| Total Revenue | 63,754 | 53,597 | 65,329 | 73,196 | 75,893 | 103,825 | 82,567 | 85,069 | 75,860 | 90,252 |
| Finfish & Other | 10,766 | 9,844 | 12,170 | 11,090 | 11,615 | 12,835 | 13,061 | 15,648 | 17,182 | 17,632 |
| Shellfish | 52,988 | 43,753 | 53,158 | 62,106 | 64,278 | 90,990 | 69,506 | 69,421 | 58,678 | 72,619 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 543 | 359 | 335 | 442 | 415 | 482 | 482 | 663 | 450 | 306 |
| Black sea bass | 724 | 118 | 454 | 445 | 451 | 590 | 507 | 421 | 702 | 818 |
| Blue crab | 39,962 | 31,141 | 41,690 | 50,115 | 52,049 | 79,055 | 60,326 | 60,467 | 49,956 | 53,581 |
| Clams or bivalves | 4,784 | 4,889 | 5,074 | 5,436 | 4,403 | 5,400 | 4,173 | 2,259 | 362 | 1,253 |
| Eastern oyster | 3,435 | 1,238 | 3,146 | 2,277 | 3,849 | 4,385 | 3,691 | 5,710 | 7,357 | 15,687 |
| Menhaden | 1,514 | 650 | 1,379 | 915 | 884 | 729 | 685 | 1,669 | 861 | 1,221 |
| Sea scallop | 4,549 | 6,201 | 2,809 | 3,758 | 3,160 | 1,188 | 551 | 202 | 8 | 1,328 |
| Striped bass | 4,259 | 4,591 | 5,333 | 5,232 | 5,180 | 5,425 | 5,623 | 6,933 | 9,931 | 7,912 |
| Summer flounder | 677 | 550 | 546 | 578 | 551 | 541 | 463 | 380 | 519 | 633 |
| White perch | 848 | 569 | 619 | 776 | 942 | 1,154 | 1,493 | 1,430 | 1,029 | 1,331 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|---------|--------|--------|--------|--------|
| Total Landings | 67,489 | 51,212 | 61,585 | 63,534 | 66,819 | 101,739 | 76,258 | 75,416 | 43,374 | 49,382 |
| Finfish & Other | 25,000 | 12,564 | 21,618 | 18,626 | 19,968 | 27,109 | 18,452 | 27,195 | 16,835 | 20,900 |
| Shellfish | 42,489 | 38,648 | 39,967 | 44,908 | 46,850 | 74,630 | 57,805 | 48,221 | 26,539 | 28,482 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 1,389 | 738 | 576 | 778 | 550 | 589 | 804 | 1,041 | 855 | 522 |
| Black sea bass | 337 | 43 | 171 | 159 | 126 | 203 | 167 | 141 | 219 | 303 |
| Blue crab | 34,914 | 29,446 | 30,778 | 34,872 | 38,801 | 66,262 | 51,163 | 43,737 | 24,179 | 24,754 |
| Clams or bivalves | 6,112 | 7,756 | 7,947 | 8,600 | 6,292 | 6,971 | 5,412 | 2,962 | 609 | 1,955 |
| Eastern oyster | 738 | 274 | 317 | 249 | 498 | 432 | 356 | 618 | 788 | 1,196 |
| Menhaden | 15,806 | 5,192 | 13,751 | 9,615 | 9,419 | 15,467 | 8,016 | 16,383 | 7,298 | 7,440 |
| Sea scallop | 591 | 931 | 450 | 569 | 521 | 153 | 58 | 20 | 1 | 110 |
| Striped bass | 2,349 | 2,485 | 2,640 | 2,655 | 2,812 | 2,510 | 2,343 | 2,541 | 2,018 | 2,305 |
| Summer flounder | 338 | 248 | 229 | 208 | 214 | 261 | 259 | 165 | 178 | 259 |
| White perch | 1,524 | 688 | 973 | 858 | 1,301 | 1,700 | 2,059 | 1,956 | 1,244 | 1,488 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|------|------|------|------|------|-------|-------|-------|-------|-------|
| Atlantic croaker | 0.39 | 0.49 | 0.58 | 0.57 | 0.75 | 0.82 | 0.60 | 0.64 | 0.53 | 0.59 |
| Black sea bass | 2.15 | 2.73 | 2.66 | 2.79 | 3.59 | 2.90 | 3.04 | 2.99 | 3.20 | 2.70 |
| Blue crab | 1.14 | 1.06 | 1.35 | 1.44 | 1.34 | 1.19 | 1.18 | 1.38 | 2.07 | 2.16 |
| Clams or bivalves | 0.78 | 0.63 | 0.64 | 0.63 | 0.70 | 0.77 | 0.77 | 0.76 | 0.59 | 0.64 |
| Eastern oyster | 4.66 | 4.52 | 9.92 | 9.13 | 7.73 | 10.15 | 10.37 | 9.24 | 9.34 | 13.11 |
| Menhaden | 0.10 | 0.13 | 0.10 | 0.10 | 0.09 | 0.05 | 0.09 | 0.10 | 0.12 | 0.16 |
| Sea scallop | 7.70 | 6.66 | 6.25 | 6.60 | 6.06 | 7.77 | 9.53 | 10.23 | 12.27 | 12.11 |
| Striped bass | 1.81 | 1.85 | 2.02 | 1.97 | 1.84 | 2.16 | 2.40 | 2.73 | 4.92 | 3.43 |
| Summer flounder | 2.01 | 2.22 | 2.39 | 2.78 | 2.58 | 2.07 | 1.78 | 2.30 | 2.92 | 2.45 |
| White perch | 0.56 | 0.83 | 0.64 | 0.90 | 0.72 | 0.68 | 0.73 | 0.73 | 0.83 | 0.89 |

2014 Economic Impacts of Maryland Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 831 | 75,757 | 33,500 | 46,788 |
| | Private Boat | 507 | 52,192 | 20,599 | 32,056 |
| | Shore | 500 | 47,883 | 18,359 | 29,524 |
| Total Durable Expenditures | | 5,883 | 551,018 | 266,327 | 404,739 |
| Total State Economic Impacts | | 7,721 | 726,850 | 338,785 | 513,107 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 36,022 | 14,890 | Fishing Tackle | 134,739 |
| Private Boat | 11,806 | 46,056 | Other Equipment | 62,083 |
| Shore | 15,909 | 25,910 | Boat Expenses | 375,272 |
| Total | 63,737 | 86,856 | Vehicle Expenses | 46,786 |
| | | | Second Home Expenses | 3,304 |
| | | | Total Durable Expenditures | 622,183 |
| Total State Trip and Durable Goods Expenditures | | | | 772,776 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|------|-------|------|------|------|------|
| Coastal | 620 | 733 | 850 | 643 | 514 | 552 | 415 | 374 | 404 | 413 |
| Non-Coastal | 49 | 84 | 78 | 50 | 43 | 54 | 49 | 40 | 36 | 41 |
| Out-of-State | 425 | 447 | 528 | 507 | 327 | 462 | 372 | 258 | 329 | 338 |
| Total Anglers | 1,094 | 1,264 | 1,456 | 1,200 | 884 | 1,068 | 836 | 672 | 769 | 792 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 212 | 239 | 270 | 195 | 203 | 140 | 161 | 151 | 154 | 211 |
| Private | 1,924 | 1,836 | 2,352 | 1,891 | 1,608 | 1,643 | 1,453 | 1,281 | 1,576 | 1,388 |
| Shore | 1,019 | 1,145 | 1,082 | 1,273 | 1,082 | 1,150 | 1,206 | 817 | 1,005 | 874 |
| Total Trips | 3,155 | 3,220 | 3,704 | 3,359 | 2,893 | 2,933 | 2,820 | 2,249 | 2,735 | 2,473 |

Harvest (H) & Release (R) of Key Species Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Black seabass | H | 91 | 121 | 39 | 27 | 33 | 36 | 47 | 33 | 30 | 68 |
| | R | 562 | 645 | 577 | 674 | 454 | 670 | 353 | 289 | 350 | 501 |
| Bluefish | H | 167 | 421 | 675 | 551 | 591 | 273 | 259 | 114 | 54 | 159 |
| | R | 236 | 778 | 1,172 | 1,631 | 671 | 162 | 409 | 139 | 258 | 142 |
| Drum (Atlantic croaker) | H | 784 | 755 | 873 | 620 | 1,335 | 1,137 | 554 | 979 | 1,139 | 1,080 |
| | R | 1,137 | 1,784 | 1,258 | 2,127 | 1,138 | 1,011 | 366 | 1,731 | 2,937 | 1,146 |
| Drum (spot) | H | 1,789 | 2,896 | 3,615 | 1,892 | 2,064 | 1,164 | 913 | 766 | 936 | 1,254 |
| | R | 2,136 | 1,355 | 1,619 | 1,738 | 632 | 1,155 | 296 | 920 | 2,622 | 566 |
| Drum (weakfish) | H | 534 | 669 | 765 | 415 | 502 | 457 | 445 | 262 | 478 | 583 |
| | R | 3,855 | 3,711 | 3,065 | 1,339 | 1,424 | 1,509 | 1,127 | 2,207 | 2,387 | 2,415 |
| Striped bass | H | 117 | 37 | 103 | 58 | 65 | 26 | 15 | 22 | 53 | 79 |
| | R | 362 | 252 | 1,018 | 923 | 816 | 1,226 | 472 | 214 | 279 | 631 |
| Summer flounder | H | 32 | 1 | 7 | 2 | 4 | 5 | 0 | 11 | 2 | 1 |
| | R | 61 | 47 | 63 | 38 | 8 | 163 | 18 | 25 | 10 | 5 |
| White perch | H | 2,410 | 2,561 | 2,890 | 1,511 | 551 | 2,613 | 1,572 | 1,534 | 2,258 | 808 |
| | R | 5,837 | 3,953 | 5,424 | 3,853 | 1,137 | 2,891 | 2,348 | 4,143 | 6,295 | 2,164 |
| Wrasses (tautog) | H | 29 | 15 | 43 | 19 | 39 | 57 | 12 | 6 | 4 | 0 |
| | R | 148 | 186 | 178 | 151 | 133 | 361 | 75 | 110 | 53 | 2 |
| Yellowfin tuna | H | 6 | 8 | 4 | 0 | 5 | 1 | 0 | 0 | 2 | 10 |
| | R | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 4 | 1 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Maryland | Marine Economy

Maryland's State Economy (% of national total)^{1,2}

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ³ |
|---------|-----------------|------------------|------------------------------|-------------------------------------|-----------------------------------|---|
| 2005 | 138,481 (1.8%) | 2,167,999 (1.9%) | 88.96 (2%) | 150.15 (2.1%) | 264.73 (2%) | 0.73 |
| 2013 | 135,421 (1.8%) | 2,182,260 (1.8%) | 108.76 (1.9%) | 187.55 (2.1%) | 339.41 (2%) | ds |
| %Change | -2.3 | 0.7 | 18.2 | 19.9 | 22 | NA |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|--------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 57 | 55 | 56 | 56 | 42 | 43 | 55 | 67 | 49 |
| | Receipts | 2,727 | 2,751 | 3,940 | 3,310 | 2,268 | 2,138 | 2,374 | 3,030 | 3,158 |
| Seafood sales, retail | Firms | 78 | 73 | 99 | 84 | 94 | 85 | 86 | 96 | 95 |
| | Receipts | 6,976 | 7,755 | 10,493 | 9,010 | 8,819 | 6,177 | 7,396 | 6,454 | 6,147 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 23 | 19 | 22 | 22 | 19 | 18 | 17 | 16 | 16 |
| | Employees | 1,141 | 1,053 | 1,296 | 1,003 | 245 | 273 | 264 | 266 | 309 |
| | Payroll | 24,986 | 28,852 | 32,386 | 39,328 | 13,049 | 12,652 | 12,773 | 13,587 | 12,455 |
| Seafood sales, wholesale | Establishments | 59 | 59 | 62 | 60 | 61 | 63 | 57 | 60 | 58 |
| | Employees | 709 | 694 | 978 | 851 | 777 | 795 | 775 | 724 | 636 |
| | Payroll | 30,148 | 32,943 | 50,353 | 42,296 | 39,055 | 39,067 | 38,971 | 34,194 | 30,119 |
| Seafood sales, retail | Establishments | 95 | 97 | 102 | 94 | 87 | 87 | 88 | 87 | 87 |
| | Employees | 576 | 617 | 613 | 590 | 485 | 526 | 562 | 575 | 574 |
| | Payroll | 13,019 | 14,190 | 14,777 | 11,510 | 11,499 | 11,810 | 12,883 | 13,027 | 13,623 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{1,2}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 10 | 10 | 8 | 6 | 7 | 8 | 6 | 4 | 4 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | 538 |
| Deep sea freight transportation | Establishments | 16 | 14 | 14 | 13 | 15 | 15 | 16 | 14 | 10 |
| | Employees | 316 | ds | 244 | 250 | 255 | 390 | 329 | 245 | 139 |
| | Payroll | 14,131 | ds | 14,905 | 19,765 | 20,722 | 24,185 | 25,071 | 17,938 | 10,041 |
| Deep sea passenger transportation | Establishments | 1 | 1 | 1 | 3 | 2 | 1 | 0 | 0 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | NA | NA | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | NA | NA | ds |
| Marinas | Establishments | 185 | 179 | 183 | 179 | 176 | 175 | 172 | 159 | 170 |
| | Employees | 1,228 | 1,260 | 1,326 | 1,383 | 1,289 | 1,275 | 1,294 | 1,276 | 1,328 |
| | Payroll | 36,590 | 40,866 | 48,752 | 45,965 | 45,483 | 43,508 | 43,330 | 43,531 | 45,540 |
| Marine cargo handling | Establishments | 12 | 13 | 15 | 15 | 16 | 17 | 17 | 6 | 12 |
| | Employees | 1,639 | 1,659 | 1,791 | 1,572 | 1,599 | 2,742 | 1,924 | ds | 1,519 |
| | Payroll | 81,219 | 73,367 | 85,328 | 48,382 | 46,727 | 95,182 | 86,680 | ds | 60,500 |
| Navigational services to shipping | Establishments | 9 | 9 | 8 | 9 | 11 | 10 | 11 | 10 | 11 |
| | Employees | ds | ds | 157 | 92 | 77 | 84 | 84 | ds | 245 |
| | Payroll | ds | ds | 4,882 | 3,968 | 3,807 | 4,015 | 4,259 | ds | 17,066 |
| Port & harbor operations | Establishments | 11 | 11 | 8 | 3 | 4 | 5 | 5 | 22 | 16 |
| | Employees | ds | ds | 323 | ds | ds | ds | ds | 1,875 | 962 |
| | Payroll | ds | ds | 13,427 | ds | ds | ds | ds | 93,001 | 44,436 |
| Ship & boat building | Establishments | 57 | 55 | 48 | 46 | 38 | 35 | 35 | 34 | 31 |
| | Employees | ds | 1,119 | 874 | 677 | 416 | ds | 633 | 378 | 371 |
| | Payroll | ds | 33,463 | 29,500 | 22,363 | 16,238 | ds | 36,675 | 14,619 | 16,822 |

¹ ds = these data are suppressed.² NA = not applicable.³ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

Tables | New Jersey



2014 Economic Impacts of the New Jersey Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|-----------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 44,433 | 6,862,897 | 1,529,212 | 2,486,353 | 7,291 | 580,593 | 192,946 | 277,011 |
| Commercial Harvesters | 2,596 | 302,784 | 79,547 | 129,021 | 2,596 | 302,784 | 79,547 | 129,021 |
| Seafood Processors & Dealers | 6,254 | 578,414 | 219,057 | 285,913 | 666 | 61,578 | 23,321 | 30,438 |
| Importers | 17,469 | 4,805,451 | 770,165 | 1,464,912 | - | - | - | - |
| Seafood Wholesalers & Distributors | 2,706 | 430,305 | 138,300 | 188,061 | 192 | 30,464 | 9,791 | 13,314 |
| Retail | 15,408 | 745,944 | 322,144 | 418,446 | 3,837 | 185,767 | 80,287 | 104,237 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 158,746 | 146,346 | 151,509 | 168,508 | 151,539 | 178,572 | 220,377 | 187,707 | 132,860 | 151,930 |
| Finfish & Other | 22,585 | 33,683 | 24,234 | 19,936 | 24,074 | 23,031 | 26,808 | 28,639 | 25,951 | 25,117 |
| Shellfish | 136,161 | 112,663 | 127,275 | 148,572 | 127,465 | 155,540 | 193,569 | 159,068 | 106,909 | 126,814 |
| Key Species | | | | | | | | | | |
| American lobster | 2,001 | 2,522 | 4,056 | 3,215 | 2,278 | 2,895 | 3,039 | 3,938 | 2,797 | 2,380 |
| Atlantic herring | 1 | 3,297 | 562 | 548 | 1,507 | 422 | 415 | 147 | 401 | 629 |
| Atlantic mackerel | 3,957 | 9,324 | 668 | 1,568 | 1,539 | 848 | 53 | 589 | 18 | 21 |
| Blue crab | 6,773 | 6,359 | 5,471 | 7,284 | 184 | 12,030 | 9,422 | 10,009 | 8,111 | 6,192 |
| Eastern oyster | 823 | 2,255 | NA | 2,547 | NA | NA | NA | NA | NA | NA |
| Goosefish | 4,451 | 4,501 | 4,486 | 4,005 | 3,018 | 2,752 | 3,654 | 3,301 | 2,453 | 2,428 |
| Ocean quahog & surfclams | 25,567 | 25,107 | 26,547 | 30,838 | 27,496 | 23,889 | 25,301 | 25,453 | 22,962 | 11,455 |
| Quahog clam | 7,556 | 7,615 | 968 | 6,254 | NA | NA | NA | NA | NA | NA |
| Sea scallop | 88,486 | 58,538 | 77,359 | 91,317 | 90,150 | 109,118 | 142,505 | 110,560 | 65,190 | 88,009 |
| Summer flounder | 4,478 | 5,091 | 3,988 | 3,461 | 3,376 | 4,552 | 5,461 | 5,434 | 4,899 | 4,863 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 156,695 | 175,777 | 153,848 | 162,308 | 162,029 | 162,164 | 187,539 | 180,505 | 119,912 | 124,114 |
| Finfish & Other | 74,193 | 89,298 | 65,166 | 62,821 | 73,623 | 74,881 | 94,678 | 104,174 | 61,790 | 63,933 |
| Shellfish | 82,502 | 86,478 | 88,683 | 99,487 | 88,406 | 87,282 | 92,861 | 76,331 | 58,122 | 60,182 |
| Key Species | | | | | | | | | | |
| American lobster | 369 | 471 | 680 | 633 | 585 | 689 | 687 | 919 | 660 | 526 |
| Atlantic herring | 1 | 25,486 | 6,038 | 6,539 | 13,692 | 4,140 | 2,385 | 1,114 | 2,344 | 4,095 |
| Atlantic mackerel | 32,414 | 24,977 | 5,384 | 9,426 | 10,255 | 4,692 | 107 | 2,017 | 46 | 29 |
| Blue crab | 6,333 | 5,981 | 4,636 | 5,816 | 257 | 9,461 | 9,600 | 7,393 | 4,391 | 3,137 |
| Eastern oyster | 162 | 343 | NA | 550 | NA | NA | NA | NA | NA | NA |
| Goosefish | 3,881 | 3,842 | 4,231 | 3,698 | 2,692 | 2,024 | 2,274 | 2,212 | 2,231 | 2,172 |
| Ocean quahog & surfclams | 49,849 | 43,644 | 44,791 | 51,597 | 45,306 | 38,538 | 41,281 | 38,921 | 35,960 | 19,447 |
| Quahog clam | 1,852 | 1,844 | 240 | 1,516 | NA | NA | NA | NA | NA | NA |
| Sea scallop | 11,831 | 8,457 | 11,808 | 13,282 | 14,045 | 14,171 | 14,545 | 11,379 | 5,640 | 7,133 |
| Summer flounder | 2,349 | 2,380 | 1,697 | 1,541 | 1,799 | 2,165 | 2,831 | 2,269 | 2,004 | 1,826 |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|------|------|------|------|------|------|------|------|-------|-------|
| American lobster | 5.42 | 5.36 | 5.96 | 5.08 | 3.89 | 4.20 | 4.42 | 4.28 | 4.23 | 4.52 |
| Atlantic herring | 0.78 | 0.13 | 0.09 | 0.08 | 0.11 | 0.10 | 0.17 | 0.13 | 0.17 | 0.15 |
| Atlantic mackerel | 0.12 | 0.37 | 0.12 | 0.17 | 0.15 | 0.18 | 0.50 | 0.29 | 0.40 | 0.74 |
| Blue crab | 1.07 | 1.06 | 1.18 | 1.25 | 0.72 | 1.27 | 0.98 | 1.35 | 1.85 | 1.97 |
| Eastern oyster | 5.09 | 6.57 | NA | 4.63 | NA | NA | NA | NA | NA | NA |
| Goosefish | 1.15 | 1.17 | 1.06 | 1.08 | 1.12 | 1.36 | 1.61 | 1.49 | 1.10 | 1.12 |
| Ocean quahog & surfclams | 0.51 | 0.58 | 0.59 | 0.60 | 0.61 | 0.62 | 0.61 | 0.65 | 0.64 | 0.59 |
| Quahog clam | 4.08 | 4.13 | 4.04 | 4.12 | NA | NA | NA | NA | NA | NA |
| Sea scallop | 7.48 | 6.92 | 6.55 | 6.88 | 6.42 | 7.70 | 9.80 | 9.72 | 11.56 | 12.34 |
| Summer flounder | 1.91 | 2.14 | 2.35 | 2.25 | 1.88 | 2.10 | 1.93 | 2.39 | 2.44 | 2.66 |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of New Jersey Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 843 | 97,175 | 45,230 | 60,497 |
| | Private Boat | 1,615 | 199,315 | 79,027 | 123,615 |
| | Shore | 725 | 81,909 | 33,277 | 51,779 |
| Total Durable Expenditures | | 16,779 | 1,658,436 | 798,708 | 1,221,087 |
| Total State Economic Impacts | | 19,962 | 2,036,835 | 956,242 | 1,456,978 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 25,745 | 31,653 | Fishing Tackle | 378,594 |
| Private Boat | 73,585 | 92,788 | Other Equipment | 110,946 |
| Shore | 25,650 | 38,592 | Boat Expenses | 854,112 |
| Total | 124,980 | 163,033 | Vehicle Expenses | 86,494 |
| | | | Second Home Expenses | 5,505 |
| | | | Total Durable Expenditures | 1,435,651 |
| Total State Trip and Durable Goods Expenditures | | | | 1,723,664 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|------|-------|
| Coastal | 818 | 693 | 890 | 765 | 656 | 776 | 687 | 662 | 581 | 607 |
| Non-Coastal | 39 | 25 | 19 | 26 | 35 | 36 | 23 | 27 | 20 | 17 |
| Out-of-State | 471 | 481 | 518 | 456 | 454 | 449 | 357 | 431 | 330 | 566 |
| Total Anglers | 1,328 | 1,199 | 1,427 | 1,247 | 1,145 | 1,261 | 1,067 | 1,120 | 931 | 1,190 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 452 | 633 | 605 | 449 | 434 | 320 | 383 | 369 | 550 | 515 |
| Private | 3,753 | 3,721 | 3,614 | 3,595 | 2,671 | 3,265 | 2,446 | 2,580 | 1,914 | 2,508 |
| Shore | 2,357 | 2,682 | 2,979 | 2,857 | 2,234 | 2,278 | 2,334 | 2,072 | 1,900 | 1,846 |
| Total Trips | 6,562 | 7,036 | 7,198 | 6,901 | 5,339 | 5,863 | 5,163 | 5,021 | 4,364 | 4,869 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|---|-------|-------|-------|-------|--------|--------|-------|-------|-------|-------|
| Black seabass | H | 660 | 531 | 724 | 580 | 583 | 687 | 149 | 735 | 345 | 469 |
| | R | 2,387 | 2,082 | 2,422 | 4,432 | 3,138 | 3,869 | 1,303 | 3,817 | 2,548 | 2,242 |
| Bluefin tuna | H | 9 | 4 | 7 | 3 | 14 | 6 | 2 | 1 | 9 | 5 |
| | R | 24 | 98 | 1 | 1 | 2 | 7 | 6 | 0 | 0 | 1 |
| Bluefish | H | 2,368 | 1,183 | 1,654 | 1,028 | 814 | 909 | 1,149 | 1,190 | 792 | 1,343 |
| | R | 2,293 | 1,803 | 2,736 | 1,477 | 1,476 | 1,886 | 1,910 | 1,996 | 883 | 1,853 |
| Drum (weakfish) | H | 6 | 141 | 1 | 152 | 240 | 125 | 206 | 57 | 82 | 177 |
| | R | 2 | 12 | 0 | 20 | 23 | 24 | 13 | 16 | 55 | 13 |
| Red hake | H | 412 | 509 | 290 | 310 | 283 | 320 | 393 | 168 | 346 | 225 |
| | R | 1,219 | 1,890 | 1,789 | 1,310 | 800 | 690 | 884 | 406 | 1,108 | 1,052 |
| Striped bass | H | 1,300 | 1,556 | 1,068 | 762 | 825 | 552 | 737 | 1,131 | 1,244 | 1,176 |
| | R | 8,939 | 6,740 | 6,192 | 8,959 | 10,414 | 10,565 | 8,096 | 6,981 | 6,461 | 9,513 |
| Summer flounder | H | 1,008 | 490 | 230 | 298 | 12 | 2 | 3 | 115 | 30 | 6 |
| | R | 1,372 | 1,336 | 612 | 1,436 | 79 | 102 | 99 | 732 | 93 | 80 |
| Winter flounder | H | 33 | 64 | 96 | 3 | 7 | 24 | 28 | 0 | 5 | 13 |
| | R | 21 | 113 | 27 | 15 | 26 | 39 | 25 | 2 | 30 | 9 |
| Wrasses (tautog) | H | 43 | 201 | 300 | 172 | 127 | 375 | 137 | 38 | 111 | 170 |
| | R | 224 | 604 | 1,290 | 901 | 856 | 1,063 | 843 | 510 | 462 | 778 |
| Yellowfin tuna | H | 22 | 35 | 58 | 7 | 7 | 25 | 17 | 69 | 75 | 7 |
| | R | 1 | 0 | 0 | 1 | 16 | 0 | 0 | 9 | 4 | 0 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

New Jersey's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 242,128 (3.2%) | 3,594,862 (3.1%) | 166.02 (3.7%) | 248.25 (3.5%) | 444.97 (3.4%) | 0.98 |
| 2013 | 230,281 (3.1%) | 3,492,216 (3%) | 195.07 (3.5%) | 289.63 (3.3%) | 537.40 (3.2%) | 1.02 |
| %Change | -5.1 | -2.9 | 14.9 | 14.3 | 17.2 | 4.1 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|--------|--------|--------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 26 | 27 | 25 | 22 | 33 | 47 | 29 | 35 | 48 |
| | Receipts | 3,086 | 3,027 | 2,399 | 1,851 | 3,670 | 3,613 | 3,447 | 3,565 | 4,981 |
| Seafood sales, retail | Firms | 93 | 72 | 90 | 92 | 86 | 66 | 68 | 77 | 74 |
| | Receipts | 9,194 | 8,916 | 11,320 | 11,196 | 11,131 | 8,265 | 8,049 | 8,972 | 8,257 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 17 | 16 | 16 | 14 | 13 | 11 | 12 | 11 | 13 |
| | Employees | 969 | 667 | 628 | 566 | 661 | 482 | 518 | 404 | 671 |
| | Payroll | 28,235 | 22,097 | 18,403 | 18,703 | 22,025 | 17,427 | 17,940 | 13,747 | 22,764 |
| Seafood sales, wholesale | Establishments | 85 | 89 | 101 | 81 | 83 | 90 | 91 | 82 | 80 |
| | Employees | 914 | 941 | 978 | 856 | 858 | 848 | 935 | 1,058 | 765 |
| | Payroll | 37,828 | 41,506 | 41,994 | 37,462 | 37,348 | 38,065 | 40,103 | 44,033 | 37,405 |
| Seafood sales, retail | Establishments | 128 | 127 | 124 | 118 | 106 | 108 | 109 | 114 | 114 |
| | Employees | 524 | 493 | 472 | 368 | 332 | 332 | 332 | 382 | 419 |
| | Payroll | 11,787 | 11,373 | 10,352 | 9,372 | 9,126 | 9,094 | 9,264 | 11,561 | 11,657 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 18 | 18 | 23 | 18 | 19 | 18 | 20 | 16 | 16 |
| | Employees | 914 | 1,040 | 778 | 645 | 594 | 600 | 508 | 402 | 367 |
| | Payroll | 54,097 | 68,096 | 56,017 | 48,911 | 41,925 | 44,246 | 40,587 | 32,007 | 32,431 |
| Deep sea freight transportation | Establishments | 38 | 39 | 31 | 27 | 26 | 26 | 26 | 25 | 20 |
| | Employees | 948 | 648 | 566 | 1,115 | 1,045 | ds | ds | 390 | 225 |
| | Payroll | 68,633 | 45,940 | 44,133 | 75,848 | 66,547 | 78,898 | 81,936 | 27,481 | 12,263 |
| Deep sea passenger transportation | Establishments | 5 | 4 | 2 | 2 | 3 | 2 | 2 | 2 | 0 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| Marinas | Establishments | 206 | 204 | 216 | 211 | 214 | 212 | 206 | 210 | 206 |
| | Employees | 978 | 940 | 1,045 | 916 | 784 | 781 | 773 | 811 | 787 |
| | Payroll | 38,323 | 39,154 | 41,624 | 39,596 | 35,811 | 35,475 | 34,675 | 35,760 | 37,606 |
| Marine cargo handling | Establishments | 26 | 25 | 23 | 21 | 22 | 21 | 22 | 15 | 20 |
| | Employees | 4,972 | 4,599 | 4,781 | 4,244 | 3,479 | 3,292 | 3,744 | 2,582 | 6,912 |
| | Payroll | 363,714 | 345,784 | 350,690 | 278,189 | 230,886 | 260,894 | 273,636 | 203,148 | 538,991 |
| Navigational services to shipping | Establishments | 16 | 19 | 26 | 20 | 19 | 16 | 17 | 18 | 18 |
| | Employees | 169 | ds | 227 | 191 | 133 | 75 | 110 | 96 | 106 |
| | Payroll | 9,673 | ds | 11,403 | 7,776 | 6,638 | 6,125 | 5,619 | 5,983 | 6,057 |
| Port & harbor operations | Establishments | 7 | 6 | 8 | 6 | 6 | 11 | 7 | 25 | 18 |
| | Employees | 194 | ds | 271 | 143 | 54 | 124 | 163 | ds | ds |
| | Payroll | 11,599 | ds | 12,197 | 12,446 | 5,548 | 10,463 | 16,933 | 139,276 | 5,995 |
| Ship & boat building | Establishments | 37 | 34 | 31 | 30 | 25 | 24 | 23 | 21 | 24 |
| | Employees | 2,320 | 2,307 | 2,305 | 2,019 | 1,188 | 1,056 | 864 | 901 | 917 |
| | Payroll | 89,421 | 88,367 | 91,460 | 79,309 | 42,909 | 37,920 | 39,810 | 36,334 | 41,886 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = data not available.

Tables | New York



2014 Economic Impacts of the New York Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|-----------|-------------|-----------------|---------|--------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 56,735 | 6,858,434 | 1,466,405 | 2,426,360 | 4,302 | 197,521 | 68,630 | 95,997 |
| Commercial Harvesters | 2,013 | 96,450 | 27,727 | 42,640 | 2,013 | 96,450 | 27,727 | 42,640 |
| Seafood Processors & Dealers | 1,193 | 171,083 | 65,048 | 84,610 | 151 | 21,662 | 8,236 | 10,713 |
| Importers | 19,105 | 5,255,450 | 842,286 | 1,602,091 | - | - | - | - |
| Seafood Wholesalers & Distributors | 5,657 | 407,246 | 137,675 | 185,632 | 148 | 10,677 | 3,610 | 4,867 |
| Retail | 28,767 | 928,205 | 393,669 | 511,388 | 1,990 | 68,732 | 29,058 | 37,777 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 56,367 | 58,479 | 60,314 | 57,429 | 48,856 | 47,717 | 48,303 | 54,524 | 56,809 | 53,848 |
| Finfish & Other | 18,317 | 19,894 | 20,434 | 18,824 | 17,571 | 18,698 | 20,256 | 23,828 | 23,463 | 18,879 |
| Shellfish | 38,051 | 38,585 | 39,880 | 38,606 | 31,285 | 29,020 | 28,046 | 30,696 | 33,346 | 34,969 |
| Key Species | | | | | | | | | | |
| American lobster | 4,396 | 6,288 | 4,623 | 3,821 | 3,468 | 3,165 | 1,398 | 999 | 938 | 957 |
| Atlantic surfclam | 7,055 | 2,135 | 5,932 | 5,670 | 5,858 | 3,929 | 545 | 2,783 | 2,410 | 1,395 |
| Eastern oyster | 1,961 | 2,390 | 2,627 | 2,870 | 1,428 | 2,046 | 2,174 | 2,227 | 4,149 | 9,309 |
| Summer flounder | 6,054 | 5,844 | 5,157 | 5,290 | 4,167 | 4,516 | 7,250 | 8,648 | 5,949 | 5,451 |
| Loligo squid | 12,696 | 12,237 | 14,224 | 13,185 | 8,397 | 7,774 | 6,905 | 9,218 | 13,475 | 11,605 |
| Quahog clam | 2,027 | 2,450 | 2,348 | 1,710 | 1,887 | 2,112 | 2,551 | 3,536 | 2,971 | 2,331 |
| Scups or porgies | 3,617 | 3,519 | 3,872 | 5,050 | 5,018 | 3,778 | 4,960 | 4,083 | 2,602 | 2,965 |
| Sea scallop | 1,468 | 2,055 | 1,628 | 1,076 | 700 | 709 | 351 | 332 | 848 | 885 |
| Softshell clam | 3,797 | 3,409 | 3,131 | 2,933 | 3,087 | 3,550 | 3,732 | 3,653 | 3,197 | 3,000 |
| Tilefishes | 2,765 | 3,325 | 3,843 | 3,343 | 3,262 | 4,077 | 4,525 | 4,260 | 4,676 | 4,255 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Landings | 38,150 | 33,287 | 35,785 | 34,175 | 34,304 | 33,267 | 32,010 | 35,864 | 33,366 | 26,029 |
| Finfish & Other | 14,631 | 14,225 | 16,492 | 15,084 | 16,194 | 18,595 | 18,814 | 19,337 | 18,574 | 15,059 |
| Shellfish | 23,519 | 19,062 | 19,293 | 19,092 | 18,110 | 14,671 | 13,196 | 16,526 | 14,792 | 10,970 |
| Key Species | | | | | | | | | | |
| American lobster | 1,154 | 1,243 | 912 | 850 | 932 | 814 | 344 | 275 | 248 | 216 |
| Atlantic surfclam | 11,953 | 2,987 | 9,161 | 8,753 | 8,799 | 5,857 | 809 | 4,117 | 3,452 | 1,983 |
| Eastern oyster | 219 | 269 | 124 | 135 | 64 | 81 | 98 | 108 | 204 | 419 |
| Summer flounder | 6,693 | 6,460 | 5,437 | 5,469 | 4,098 | 3,900 | 5,630 | 7,838 | 4,985 | 5,141 |
| Loligo squid | 1,617 | 1,650 | 1,592 | 1,476 | 1,410 | 1,216 | 1,131 | 1,299 | 1,932 | 1,779 |
| Quahog clam | 2,186 | 2,416 | 2,325 | 1,214 | 1,850 | 2,690 | 3,729 | 4,307 | 4,574 | 3,190 |
| Scups or porgies | 647 | 1,040 | 619 | 782 | 918 | 508 | 522 | 430 | 256 | 261 |
| Sea scallop | 270 | 393 | 198 | 131 | 114 | 116 | 57 | 54 | 138 | 144 |
| Softshell clam | 1,799 | 1,220 | 942 | 856 | 1,142 | 1,364 | 1,517 | 1,238 | 1,033 | 834 |
| Tilefishes | 1,142 | 1,298 | 1,393 | 1,199 | 1,435 | 1,586 | 1,521 | 1,413 | 1,468 | 1,383 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|
| American lobster | 3.81 | 5.06 | 5.07 | 4.49 | 3.72 | 3.89 | 4.06 | 3.63 | 3.78 | 4.43 |
| Atlantic surfclam | 0.59 | 0.71 | 0.65 | 0.65 | 0.67 | 0.67 | 0.67 | 0.68 | 0.70 | 0.70 |
| Eastern oyster | 8.97 | 8.87 | 21.21 | 21.21 | 22.23 | 25.41 | 22.23 | 20.58 | 20.32 | 22.23 |
| Summer flounder | 0.90 | 0.90 | 0.95 | 0.97 | 1.02 | 1.16 | 1.29 | 1.10 | 1.19 | 1.06 |
| Loligo squid | 7.85 | 7.42 | 8.94 | 8.93 | 5.96 | 6.39 | 6.10 | 7.10 | 6.97 | 6.52 |
| Quahog clam | 0.93 | 1.01 | 1.01 | 1.41 | 1.02 | 0.79 | 0.68 | 0.82 | 0.65 | 0.73 |
| Scups or porgies | 5.59 | 3.38 | 6.25 | 6.46 | 5.47 | 7.44 | 9.50 | 9.50 | 10.18 | 11.34 |
| Sea scallop | 5.43 | 5.23 | 8.23 | 8.24 | 6.13 | 6.13 | 6.13 | 6.13 | 6.13 | 6.13 |
| Softshell clam | 2.11 | 2.80 | 3.33 | 3.43 | 2.70 | 2.60 | 2.46 | 2.95 | 3.09 | 3.60 |
| Tilefishes | 2.42 | 2.56 | 2.76 | 2.79 | 2.27 | 2.57 | 2.97 | 3.01 | 3.18 | 3.08 |

2014 Economic Impacts of New York Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 909 | 107,324 | 54,315 | 69,786 |
| | Private Boat | 936 | 99,801 | 40,548 | 65,302 |
| | Shore | 299 | 26,618 | 10,920 | 16,957 |
| Total Durable Expenditures | | 7,417 | 743,185 | 360,732 | 566,683 |
| Total State Economic Impacts | | 9,561 | 976,928 | 466,515 | 718,728 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 187,584 |
| For-Hire | 6,788 | 58,494 | Other Equipment | 63,884 |
| Private Boat | 6,099 | 105,911 | Boat Expenses | 432,356 |
| Shore | 3,042 | 22,651 | Vehicle Expenses | 34,216 |
| Total | 15,929 | 187,055 | Second Home Expenses | 718 |
| | | | Total Durable Expenditures | 718,758 |
| Total State Trip and Durable Goods Expenditures | | | | 921,742 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|------|-------|------|------|------|------|------|------|------|
| Coastal | 885 | 735 | 881 | 817 | 638 | 646 | 497 | 533 | 595 | 657 |
| Non-Coastal | 27 | 25 | 39 | 32 | 21 | 24 | 18 | 30 | 8 | 19 |
| Out-of-State | 110 | 114 | 147 | 118 | 58 | 69 | 46 | 53 | 93 | 155 |
| Total Anglers | 1,022 | 874 | 1,067 | 967 | 717 | 739 | 561 | 616 | 696 | 831 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 527 | 361 | 684 | 388 | 381 | 348 | 458 | 366 | 565 | 439 |
| Private | 3,107 | 3,120 | 3,315 | 3,199 | 2,819 | 2,351 | 2,320 | 1,908 | 1,711 | 2,165 |
| Shore | 2,495 | 1,961 | 2,522 | 2,341 | 1,625 | 1,675 | 1,389 | 1,492 | 1,597 | 1,351 |
| Total Trips | 6,129 | 5,442 | 6,521 | 5,928 | 4,825 | 4,374 | 4,167 | 3,766 | 3,873 | 3,955 |

Harvest (H) & Release (R) of Key Species Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Atlantic herring ² | H | 60 | 23 | 214 | 70 | 3 | 79 | 75 | 174 | 222 | 189 |
| | R | 2 | 2 | 230 | 50 | 0 | 17 | 0 | 0 | 59 | 15 |
| Black seabass | H | 143 | 269 | 410 | 259 | 566 | 543 | 275 | 322 | 353 | 423 |
| | R | 1,071 | 1,326 | 1,550 | 1,654 | 1,236 | 1,163 | 893 | 2,471 | 1,372 | 1,298 |
| Bluefish | H | 1,684 | 1,832 | 2,150 | 1,484 | 1,294 | 1,026 | 928 | 1,150 | 1,108 | 1,421 |
| | R | 3,380 | 2,379 | 2,650 | 3,225 | 1,793 | 1,472 | 1,599 | 1,809 | 1,030 | 1,529 |
| Drum (weakfish) | H | 859 | 1,678 | 1,596 | 1,451 | 1,460 | 1,991 | 715 | 592 | 1,096 | 1,133 |
| | R | 1,737 | 2,622 | 1,964 | 2,838 | 2,124 | 1,864 | 998 | 1,235 | 1,865 | 1,697 |
| Porgies (scup) | H | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0 | 12 |
| | R | 5 | 0 | 0 | 0 | 0 | 0 | 3 | 3 | 1 | 15 |
| Shortfin mako shark | H | 378 | 368 | 475 | 685 | 357 | 539 | 676 | 424 | 491 | 409 |
| | R | 1,412 | 1,723 | 1,678 | 1,347 | 1,074 | 1,069 | 1,506 | 586 | 989 | 725 |
| Striped bass | H | 1,163 | 753 | 867 | 608 | 298 | 335 | 376 | 509 | 518 | 509 |
| | R | 7,753 | 4,946 | 5,272 | 5,521 | 5,564 | 6,571 | 7,296 | 5,013 | 4,667 | 4,524 |
| Summer flounder | H | 0 | 10 | 4 | 40 | 0 | 3 | 0 | 5 | 7 | 1 |
| | R | 76 | 17 | 109 | 25 | 3 | 3 | 55 | 12 | 6 | 0 |
| Winter flounder | H | 100 | 261 | 11 | 41 | 69 | 31 | 65 | 44 | 1 | 25 |
| | R | 200 | 76 | 14 | 17 | 110 | 63 | 101 | 33 | 3 | 11 |
| Wrasses (tautog) | H | 85 | 246 | 223 | 320 | 346 | 146 | 111 | 61 | 77 | 265 |
| | R | 177 | 823 | 386 | 728 | 665 | 567 | 487 | 365 | 590 | 898 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.² This species may not be equivalent to species with similar names listed in the commercial tables.

New York's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 514,265 (6.9%) | 7,417,463 (6.4%) | 370.84 (8.3%) | 557.79 (7.9%) | 1,024.33 (7.9%) | 0.13 |
| 2013 | 532,669 (7.1%) | 7,688,492 (6.5%) | 466.82 (8.3%) | 706.97 (8%) | 1,341.59 (8%) | 0.13 |
| %Change | 3.5 | 3.5 | 20.6 | 21.1 | 23.6 | 0.0 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product | Firms | 57 | 61 | 68 | 73 | 101 | 115 | 142 | 133 | 150 |
| prep. & packaging | Receipts | 2,652 | 3,044 | 3,516 | 3,383 | 4,896 | 6,784 | 7,380 | 8,279 | 9,946 |
| Seafood sales, retail | Firms | 219 | 206 | 266 | 247 | 196 | 214 | 183 | 205 | 197 |
| | Receipts | 24,987 | 24,790 | 23,157 | 23,983 | 19,753 | 18,999 | 16,286 | 16,714 | 15,923 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product | Establishments | 18 | 15 | 15 | 17 | 15 | 15 | 18 | 17 | 17 |
| prep. & packaging | Employees | 324 | 298 | 294 | 379 | 0 | 272 | 299 | 265 | 280 |
| | Payroll | 14,810 | 16,491 | 18,723 | 18,570 | 15,227 | 16,976 | 21,372 | 25,666 | 22,776 |
| Seafood sales, wholesale | Establishments | 269 | 254 | 291 | 231 | 246 | 263 | 291 | 243 | 264 |
| | Employees | 2,003 | 2,066 | 2,058 | 1,627 | 1,741 | 1,798 | 1,876 | 1,839 | 1,937 |
| | Payroll | 76,177 | 78,198 | 84,361 | 72,233 | 68,345 | 72,442 | 76,970 | 78,324 | 84,346 |
| Seafood sales, retail | Establishments | 392 | 388 | 372 | 368 | 386 | 394 | 391 | 385 | 399 |
| | Employees | 1,513 | 1,495 | 1,575 | 1,470 | 1,509 | 1,586 | 1,660 | 1,674 | 1,796 |
| | Payroll | 25,665 | 26,701 | 28,497 | 30,741 | 31,640 | 32,001 | 35,664 | 38,721 | 45,049 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|---------|---------|---------|---------|---------|---------|---------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 57 | 55 | 50 | 50 | 48 | 65 | 62 | 42 | 59 |
| | Employees | 1,448 | 1,464 | 1,746 | 1,759 | 2,299 | 1,654 | 1,708 | ds | ds |
| | Payroll | 91,347 | 109,315 | 125,570 | 160,735 | 198,352 | 136,577 | 154,087 | ds | ds |
| Deep sea freight transportation | Establishments | 39 | 38 | 34 | 29 | 32 | 30 | 31 | 23 | 20 |
| | Employees | 602 | ds | ds | 732 | 782 | 704 | 752 | 214 | ds |
| | Payroll | 39,309 | ds | 65,632 | 108,744 | 89,313 | 98,499 | 88,354 | 31,229 | 22,691 |
| Deep sea passenger transportation | Establishments | 6 | 4 | 4 | 3 | 4 | 2 | 1 | 2 | 3 |
| | Employees | ds | ds | 7 | ds | 8 | ds | ds | ds | ds |
| | Payroll | ds | ds | 240 | 316 | 126 | ds | ds | ds | ds |
| Marinas | Establishments | 416 | 404 | 411 | 419 | 418 | 429 | 431 | 415 | 424 |
| | Employees | 2,093 | 2,112 | 2,070 | 2,263 | 2,099 | 2,052 | 2,033 | 1,868 | 1,907 |
| | Payroll | 84,832 | 83,807 | 88,862 | 100,910 | 96,640 | 94,654 | 96,408 | 87,124 | 93,212 |
| Marine cargo handling | Establishments | 12 | 12 | 12 | 10 | 9 | 13 | 12 | 6 | 9 |
| | Employees | ds | ds | ds | ds | ds | 1,086 | 1,019 | ds | 922 |
| | Payroll | ds | ds | ds | ds | ds | 68,555 | 66,439 | ds | 60,079 |
| Navigational services to shipping | Establishments | 35 | 36 | 36 | 32 | 37 | 37 | 35 | 53 | 33 |
| | Employees | ds | ds | 578 | 386 | 312 | 598 | 596 | 712 | 687 |
| | Payroll | ds | ds | 40,976 | 23,294 | 19,126 | 50,119 | 54,406 | 63,334 | 68,141 |
| Port & harbor operations | Establishments | 3 | 3 | 5 | 3 | 4 | 8 | 9 | 18 | 15 |
| | Employees | ds | 6 | ds | ds | ds | ds | 33 | 1,294 | 196 |
| | Payroll | ds | 119 | ds | ds | ds | 568 | 1,493 | 105,325 | 12,358 |
| Ship & boat building | Establishments | 47 | 48 | 53 | 49 | 47 | 41 | 43 | 49 | 45 |
| | Employees | 590 | ds | 643 | 688 | 585 | 575 | 552 | 560 | ds |
| | Payroll | 21,514 | ds | 26,653 | 30,462 | 28,880 | 26,771 | 25,998 | 24,599 | 24,338 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

Tables | Virginia



2014 Economic Impacts of the Virginia Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 17,253 | 1,256,929 | 396,372 | 568,765 | 14,618 | 798,612 | 304,860 | 412,727 |
| Commercial Harvesters | 4,485 | 288,115 | 92,031 | 136,909 | 4,485 | 288,115 | 92,031 | 136,909 |
| Seafood Processors & Dealers | 1,478 | 129,405 | 50,348 | 64,979 | 1,421 | 124,396 | 48,399 | 62,464 |
| Importers | 1,392 | 382,882 | 61,364 | 116,719 | - | - | - | - |
| Seafood Wholesalers & Distributors | 751 | 90,942 | 31,438 | 41,900 | 483 | 58,501 | 20,223 | 26,953 |
| Retail | 9,147 | 365,586 | 161,191 | 208,258 | 8,229 | 327,600 | 144,206 | 186,401 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 155,066 | 110,066 | 138,149 | 146,602 | 152,017 | 183,181 | 193,976 | 174,534 | 163,027 | 168,239 |
| Finfish & Other | 48,559 | 41,637 | 45,735 | 40,506 | 47,575 | 55,915 | 58,526 | 61,675 | 57,001 | 54,671 |
| Shellfish | 106,507 | 68,430 | 92,414 | 106,096 | 104,442 | 127,267 | 135,450 | 112,859 | 106,026 | 113,568 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 3,691 | 4,326 | 4,445 | 5,269 | 6,940 | 6,025 | 4,571 | 7,532 | 6,247 | 4,129 |
| Black sea bass | 1,242 | 1,048 | 663 | 759 | 569 | 928 | 1,003 | 1,401 | 1,716 | 1,365 |
| Blue crab | 20,578 | 14,057 | 15,793 | 18,013 | 21,169 | 29,133 | 26,274 | 24,561 | 23,991 | 26,991 |
| Catfishes & bullheads | 900 | 1,570 | 978 | 1,191 | 1,567 | 670 | 1,001 | 480 | 645 | 416 |
| Goosefish | 1,142 | 685 | 781 | 951 | 631 | 594 | 752 | 1,218 | 920 | 654 |
| Menhaden | 25,259 | 22,306 | 25,317 | 21,271 | 23,578 | 34,476 | 32,995 | 31,107 | 25,343 | 26,021 |
| Sea Scallop | 84,574 | 52,764 | 63,013 | 65,534 | 63,312 | 70,204 | 79,427 | 54,076 | 32,610 | 33,643 |
| Spot | 2,227 | 1,793 | 3,232 | 1,171 | 3,411 | 975 | 3,431 | 769 | 2,406 | 5,681 |
| Striped bass | 4,457 | 2,946 | 3,831 | 3,378 | 4,219 | 3,635 | 4,497 | 5,542 | 5,702 | 6,372 |
| Summer flounder | 4,652 | 4,373 | 3,184 | 2,719 | 2,959 | 4,202 | 5,956 | 7,725 | 8,513 | 4,732 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 441,538 | 426,229 | 493,415 | 423,066 | 426,798 | 510,474 | 496,629 | 462,503 | 381,607 | 388,069 |
| Finfish & Other | 402,586 | 393,735 | 452,342 | 384,804 | 379,296 | 457,408 | 442,345 | 417,264 | 346,806 | 353,208 |
| Shellfish | 38,952 | 32,494 | 41,073 | 38,262 | 47,502 | 53,066 | 54,284 | 45,239 | 34,801 | 34,861 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 9,272 | 7,829 | 10,588 | 11,214 | 8,576 | 7,873 | 5,569 | 6,942 | 6,325 | 4,766 |
| Black sea bass | 475 | 328 | 189 | 215 | 164 | 264 | 275 | 392 | 496 | 388 |
| Blue crab | 26,064 | 22,708 | 25,141 | 23,243 | 32,756 | 38,490 | 39,656 | 33,144 | 24,258 | 24,040 |
| Catfishes & bullheads | 1,622 | 1,360 | 1,598 | 1,770 | 1,877 | 871 | 1,022 | 767 | 1,140 | 771 |
| Goosefish | 1,157 | 677 | 847 | 972 | 743 | 596 | 604 | 907 | 846 | 587 |
| Menhaden | 372,578 | 370,946 | 420,481 | 353,895 | 351,392 | 433,241 | 414,159 | 390,318 | 317,950 | 326,592 |
| Sea Scallop | 11,444 | 8,302 | 9,916 | 9,685 | 10,137 | 9,167 | 8,260 | 5,798 | 2,958 | 2,752 |
| Spot | 3,103 | 1,696 | 4,328 | 1,977 | 3,910 | 1,024 | 3,742 | 613 | 2,085 | 3,929 |
| Striped bass | 2,472 | 1,431 | 1,962 | 2,196 | 2,109 | 2,139 | 2,077 | 2,175 | 1,680 | 1,990 |
| Summer flounder | 3,869 | 2,757 | 1,856 | 1,654 | 1,980 | 2,592 | 4,065 | 4,122 | 4,794 | 2,049 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------------|------|------|------|------|------|------|------|------|-------|-------|
| Atlantic croaker | 0.40 | 0.55 | 0.42 | 0.47 | 0.81 | 0.77 | 0.82 | 1.09 | 0.99 | 0.87 |
| Black sea bass | 2.61 | 3.19 | 3.50 | 3.52 | 3.46 | 3.52 | 3.65 | 3.57 | 3.46 | 3.52 |
| Blue crab | 0.79 | 0.62 | 0.63 | 0.77 | 0.65 | 0.76 | 0.66 | 0.74 | 0.99 | 1.12 |
| Catfishes & bullheads | 0.55 | 1.15 | 0.61 | 0.67 | 0.83 | 0.77 | 0.98 | 0.63 | 0.57 | 0.54 |
| Goosefish | 0.99 | 1.01 | 0.92 | 0.98 | 0.85 | 1.00 | 1.25 | 1.34 | 1.09 | 1.11 |
| Menhaden | 0.07 | 0.06 | 0.06 | 0.06 | 0.07 | 0.08 | 0.08 | 0.08 | 0.08 | 0.08 |
| Sea Scallop | 7.39 | 6.36 | 6.35 | 6.77 | 6.25 | 7.66 | 9.62 | 9.33 | 11.02 | 12.23 |
| Spot | 0.72 | 1.06 | 0.75 | 0.59 | 0.87 | 0.95 | 0.92 | 1.25 | 1.15 | 1.45 |
| Striped bass | 1.80 | 2.06 | 1.95 | 1.54 | 2.00 | 1.70 | 2.16 | 2.55 | 3.39 | 3.20 |
| Summer flounder | 1.20 | 1.59 | 1.72 | 1.64 | 1.49 | 1.62 | 1.47 | 1.87 | 1.78 | 2.31 |

2014 Economic Impacts of Virginia Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 107 | 10,410 | 4,158 | 6,119 |
| | Private Boat | 754 | 74,342 | 28,674 | 46,791 |
| | Shore | 438 | 39,331 | 15,575 | 24,803 |
| Total Durable Expenditures | | 3,919 | 349,576 | 164,208 | 257,769 |
| Total State Economic Impacts | | 5,218 | 473,659 | 212,615 | 335,482 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 104,059 |
| For-Hire | 3,583 | 3,394 | Other Equipment | 36,758 |
| Private Boat | 20,519 | 54,347 | Boat Expenses | 166,902 |
| Shore | 14,480 | 18,241 | Vehicle Expenses | 20,574 |
| Total | 38,582 | 75,983 | Second Home Expenses | 5,556 |
| | | | Total Durable Expenditures | 333,850 |
| Total State Trip and Durable Goods Expenditures | | | | 448,415 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|------|------|------|------|------|------|------|------|
| Coastal | 559 | 578 | 463 | 464 | 515 | 496 | 516 | 412 | 419 | 341 |
| Non-Coastal | 137 | 90 | 76 | 89 | 87 | 63 | 56 | 78 | 74 | 53 |
| Out-of-State | 511 | 364 | 297 | 338 | 305 | 279 | 320 | 193 | 267 | 206 |
| Total Anglers | 1,207 | 1,032 | 836 | 891 | 907 | 838 | 892 | 683 | 760 | 600 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 37 | 43 | 60 | 57 | 48 | 45 | 30 | 45 | 59 | 53 |
| Private | 2,563 | 2,590 | 2,369 | 2,353 | 2,124 | 1,700 | 1,782 | 1,426 | 1,302 | 1,209 |
| Shore | 1,365 | 1,155 | 1,083 | 1,089 | 876 | 852 | 1,086 | 1,051 | 1,120 | 920 |
| Total Trips | 3,965 | 3,788 | 3,512 | 3,499 | 3,048 | 2,597 | 2,898 | 2,522 | 2,481 | 2,182 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Black seabass | H | 34 | 83 | 36 | 39 | 115 | 29 | 19 | 4 | 21 | 15 |
| | R | 1,116 | 1,356 | 1,271 | 1,251 | 1,152 | 525 | 444 | 884 | 594 | 563 |
| Cobia | H | 18 | 22 | 10 | 5 | 17 | 7 | 4 | 1 | 10 | 6 |
| | R | 16 | 23 | 3 | 3 | 13 | 9 | 9 | 9 | 16 | 15 |
| Drum (Atlantic croaker) | H | 7,657 | 7,222 | 6,944 | 8,389 | 5,328 | 4,744 | 3,305 | 3,455 | 4,318 | 3,461 |
| | R | 8,738 | 4,194 | 8,505 | 7,807 | 7,621 | 4,824 | 4,873 | 5,100 | 6,014 | 3,606 |
| Drum (spot) | H | 2,782 | 3,585 | 8,203 | 4,398 | 2,147 | 1,670 | 2,967 | 1,350 | 4,288 | 3,909 |
| | R | 2,457 | 1,372 | 2,156 | 1,487 | 1,458 | 1,155 | 2,245 | 1,146 | 2,218 | 1,174 |
| Drum (spotted seatrout) | H | 22 | 43 | 159 | 104 | 22 | 17 | 248 | 126 | 55 | 47 |
| | R | 192 | 83 | 363 | 367 | 171 | 550 | 1,215 | 429 | 291 | 404 |
| Drum (weakfish) | H | 3 | 13 | 46 | 21 | 38 | 11 | 0 | 29 | 124 | 54 |
| | R | 28 | 186 | 110 | 237 | 178 | 29 | 61 | 2,503 | 220 | 114 |
| Red drum | H | 258 | 461 | 238 | 245 | 226 | 74 | 123 | 70 | 87 | 61 |
| | R | 1,295 | 1,655 | 949 | 532 | 359 | 135 | 154 | 102 | 169 | 255 |
| Striped bass | H | 684 | 763 | 398 | 260 | 288 | 261 | 317 | 260 | 187 | 139 |
| | R | 2,509 | 2,164 | 3,023 | 2,425 | 3,613 | 2,420 | 1,987 | 856 | 515 | 642 |
| Summer flounder | H | 44 | 43 | 88 | 28 | 16 | 4 | 4 | 22 | 2 | 9 |
| | R | 355 | 556 | 230 | 427 | 84 | 178 | 289 | 103 | 80 | 108 |
| Wrasses (tautog) | H | 61 | 105 | 61 | 56 | 61 | 127 | 46 | 14 | 6 | 26 |
| | R | 77 | 200 | 80 | 34 | 34 | 130 | 36 | 17 | 17 | 56 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

Virginia's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|------------------------------|-------------------------------------|-----------------------------------|---|
| 2005 | 193,067 (2.6%) | 3,060,127 (2.6%) | 121.80 (2.7%) | 208.44 (2.9%) | 358.73 (2.8%) | 0.51 |
| 2013 | 193,907 (2.6%) | 3,131,723 (2.6%) | 154.47 (2.7%) | 259.46 (2.9%) | 454.98 (2.7%) | 0.68 |
| %Change | 0.4 | 2.3 | 21.2 | 19.7 | 21.2 | 33.3 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 65 | 74 | 62 | 74 | 69 | 56 | 73 | 76 | 84 |
| | Receipts | 3,665 | 4,916 | 4,845 | 5,020 | 4,053 | 3,698 | 3,792 | 4,691 | 4,276 |
| Seafood sales, retail | Firms | 80 | 86 | 84 | 80 | 82 | 82 | 78 | 87 | 94 |
| | Receipts | 8,762 | 8,027 | 7,265 | 8,273 | 6,642 | 6,951 | 7,819 | 8,373 | 7,612 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 39 | 33 | 30 | 26 | 25 | 23 | 18 | 19 | 18 |
| | Employees | 1,336 | 871 | 955 | 490 | 941 | 961 | 899 | 919 | 781 |
| | Payroll | 39,980 | 28,530 | 34,520 | 11,366 | 30,600 | 30,460 | 33,285 | 32,955 | 30,682 |
| Seafood sales, wholesale | Establishments | 86 | 80 | 83 | 69 | 72 | 76 | 62 | 64 | 70 |
| | Employees | 675 | 605 | 734 | 621 | 519 | 518 | 469 | 492 | 483 |
| | Payroll | 21,864 | 21,388 | 25,365 | 17,667 | 15,620 | 17,901 | 15,733 | 14,271 | 14,719 |
| Seafood sales, retail | Establishments | 69 | 75 | 73 | 68 | 62 | 59 | 58 | 51 | 55 |
| | Employees | 286 | 334 | 282 | 251 | 271 | 265 | 277 | 280 | 254 |
| | Payroll | 4,865 | 5,348 | 5,227 | 5,170 | 5,401 | 5,480 | 5,453 | 5,563 | 5,526 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 15 | 13 | 15 | 10 | 9 | 7 | 7 | 12 | 11 |
| | Employees | ds | ds | 565 | ds | ds | ds | ds | ds | 177 |
| | Payroll | ds | ds | 30,704 | ds | ds | ds | ds | ds | 10,077 |
| Deep sea freight transportation | Establishments | 24 | 22 | 20 | 18 | 16 | 17 | 21 | 19 | 12 |
| | Employees | 1,090 | 1,564 | 1,611 | 409 | ds | 421 | 492 | ds | ds |
| | Payroll | 95,871 | 141,085 | 148,502 | 32,473 | 19,241 | 35,917 | 42,018 | ds | ds |
| Deep sea passenger transportation | Establishments | 1 | 1 | 1 | 2 | 2 | 1 | 2 | 1 | 1 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 141 | 131 | 126 | 119 | 118 | 115 | 110 | 105 | 113 |
| | Employees | ds | ds | 992 | 964 | 829 | 868 | 818 | 673 | 840 |
| | Payroll | ds | ds | 26,186 | 24,326 | 24,631 | 24,182 | 23,379 | 18,874 | 24,468 |
| Marine cargo handling | Establishments | 18 | 17 | 15 | 12 | 12 | 7 | 11 | 6 | 8 |
| | Employees | 1,516 | 1,110 | 1,085 | ds | ds | ds | ds | ds | ds |
| | Payroll | 52,254 | 51,654 | 56,696 | ds | ds | 41,280 | 41,262 | ds | ds |
| Navigational services to shipping | Establishments | 21 | 17 | 18 | 23 | 25 | 26 | 21 | 20 | 18 |
| | Employees | ds | ds | 216 | 375 | 384 | 411 | 419 | 428 | 303 |
| | Payroll | ds | ds | 11,700 | 21,014 | 22,177 | 22,910 | 22,132 | 25,732 | 20,283 |
| Port & harbor operations | Establishments | 9 | 10 | 10 | 8 | 6 | 7 | 6 | 13 | 14 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Ship & boat building | Establishments | 50 | 51 | 52 | 59 | 53 | 56 | 51 | 59 | 54 |
| | Employees | 21,230 | 21,741 | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | 938,375 | 993,066 | ds | ds | ds | ds | ds | ds | ds |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

South Atlantic Region

- East Florida
- Georgia
- North Carolina
- South Carolina



Vermilion in tote, South Carolina
(photo credit: Amber Van Harten)

MANAGEMENT CONTEXT

The South Atlantic Region includes East Florida, Georgia, North Carolina and South Carolina. Federal fisheries in this region are managed by the South Atlantic Fishery Management Council (SAFMC) and NOAA Fisheries under five fishery management plans (FMPs). The coastal migratory pelagic resources and spiny lobster FMPs are managed with the Gulf of Mexico Fishery Management Council (GMFMC). The SAFMC, in cooperation with the Mid-Atlantic and New England Fishery Management Councils, has developed a dolphin wahoo FMP for the Atlantic.

South Atlantic Region FMPs

1. Coastal migratory pelagic resources (with GMFMC)
2. Coral, coral reef and live/hardbottom habitat
3. Dolphin/wahoo
4. Golden crab
5. Pelagic sargassum habitat
6. Shrimp
7. Snapper grouper
8. Spiny lobster (with GMFMC)

Red porgy, red snapper, snowy grouper and blueline tilefish were listed as overfished in 2014. Four stocks or stock complexes are currently subject to overfishing: red snapper, speckled hind, warsaw grouper and blueline tilefish. Snowy grouper and gag grouper were removed from the overfishing list in 2014.

CATCH SHARE PROGRAMS

The South Atlantic Wreckfish Individual Transferable Quota Program was implemented in 1992 and is the only catch share program in the South Atlantic Region. This program was developed to create incentives for the conservation of wreckfish; provide a management regime, that promotes stability and facilitates long-range planning and investment by harvesters and dealers; promote management regimes that minimize gear and area conflicts among fishermen; minimize the tendency for over-capitalization in the harvesting and processing/distribution sectors; and provide a reasonable opportunity for fishermen to make adequate returns from commercial fishing by limiting entry into the program. NOAA Fisheries continues to collect data on this program to develop standard performance indica-

tors that measure its basic economic performance.

POLICY UPDATES

Amendment 20B to the Coastal Migratory Pelagics FMP addressed issues associated with the boundaries between migratory groups, zones and subzones; allocation of commercial annual catch limits; and modification of the framework procedure for management of king mackerel, Spanish mackerel and cobia. More specifically, effective March 1, 2015, Amendment 20B will: 1) eliminate the 500-pound trip limit that is effective when 75 percent of the respective quotas are landed for king mackerel in the Florida West Coast Northern and Southern sub-zones; 2) change the fishing year for king mackerel in the Florida West Coast Northern sub-zone to October-September beginning October 1, 2015; 3) allow transit of commercial vessels with king mackerel through areas closed to king mackerel fishing, if gear is appropriately stowed; 4) create Northern and Southern Zones for Atlantic migratory group king and Spanish mackerel, each with separate quotas; 4) make administrative changes to the framework procedure for modifying management measures; 5) increase annual catch limits and catch targets for cobia; and 6) create a Florida East Coast Zone for cobia to adjust for differences between the SAFMC and GMFMC jurisdictional areas, and the biological distribution of the Gulf of Mexico and Atlantic stocks.

COMMERCIAL FISHERIES

In 2014, commercial fishermen in the South Atlantic Region landed 105 million pounds of finfish and shellfish, earning \$184 million in landings revenue. Landings revenue was dominated by shrimp (\$50 million) and blue crab (\$46 million). These species groups commanded ex-vessel prices of \$3.17 and \$1.37 per pound, respectively, and together made up 52 percent of total landings revenue in the South Atlantic Region. North Carolina and East Florida had the highest landings revenue in the Region in 2014 with \$94 million and \$53 million, respectively. South Carolina landings revenue was \$21 million, while Georgia landings revenue was \$15 million. North Carolina also had the highest landings (62 million pounds), followed by East Florida (23 million pounds), Georgia (11 million pounds), and South Carolina (9 million pounds).

Key South Atlantic Region Commercial Species

- Blue crab
- Clams
- Flounders
- Groupers
- King mackerels
- Oysters
- Shrimp
- Snappers
- Swordfish
- Tunas

Economic Impacts

In this report, the U.S. seafood industry^{1,2} includes the commercial harvest sector, seafood processors and dealers, seafood wholesalers and distributors, importers, and seafood retailers. In 2014, the South Atlantic Region's seafood industry generated \$18.3 billion in sales impacts in Florida, \$1.9 billion in sales impacts in Georgia, \$990 million in sales impacts in North Carolina, and \$171 million in sales impacts in South Carolina. The largest economic impacts were generated in Florida which in addition to \$18.3 billion in sales impacts, generated 93,000 jobs, \$3.4 billion in income impacts, and \$6.1 billion in value-added impacts. The smallest economic impacts in the Region were generated in South Carolina: 2,000 jobs, \$50 million in income, and \$74 million in value-added impacts. The sector that generated the greatest employment impacts by state was the importers sector with 48,000 jobs in Florida.

Landings Revenue

Landings revenue in the South Atlantic Region totaled \$184 million in 2014. This was a 40 percent increase (a 19% increase in real terms after adjusting for inflation) from 2005 levels and a 14 percent increase from 2013. Shrimp (\$50 million) and blue crab (\$46 million) had the highest landings revenue, together accounting for 52 percent of the South Atlantic Region's landings revenue in 2014. North Carolina had the highest landings revenue (\$94 million), followed by East Florida (\$53 million). In 2014, these two states dominated both finfish landings revenue (\$37 million, North Carolina; \$24 million, East Florida) and shellfish landings revenue (\$57 million, North Carolina; \$29 million, East Florida).

From 2005 to 2014, landings revenue of oysters (116%, 84% in real terms), shrimp (61%, 37% in real terms), and blue crab (45%, 24% in real terms) increased significantly. In contrast, landings revenue of clams (-13%, -26% in real terms) and groupers

(-11%, -25% in real terms) declined during this period. Landing revenues from blue crab increased during this period despite an 11 percent decrease in landings. The revenue increase was due to a 63 percent (40% in real terms) increase in the market price. National market trends for blue crab show a similar trend. Landings declined 15 percent during this period, resulting in reduced supply and higher prices at the national level (up 76%, 49% increase in real terms). From 2013 to 2014, landings revenue of flounder increased 90 percent and shrimp increased 30 percent; swordfish landings revenue fell 22 percent during the same period.

Commercial Fisheries Facts**Landings revenue**

- On average from 2005 to 2014, the key species or species groups accounted for 78 percent of total revenue, generating an annual average of \$125 million in the South Atlantic Region.
- On average, landings revenue in the South Atlantic region was split shellfish (61%) and finfish (39%).
- Shrimp had the highest annual average landings revenue in the region from 2005 to 2014 with \$44 million.

Landings

- Key species or species groups contributed an average of 66 percent annually to total landings between 2005 and 2014, or 74 million pounds.
- Blue crab contributed the most to landings in the region, averaging 38 million pounds from 2005 to 2014.

Prices

- Clams had the highest average annual ex-vessel price from 2005 to 2014 at \$5.68.
- Blue crabs had the lowest average annual ex-vessel price from 2005 to 2014 at \$0.98.

Landings

Fishermen in the South Atlantic Region landed 105 million pounds of finfish and shellfish in 2014. This figure was a 15 percent decrease from 2005 and a 15 percent increase from 2013. Finfish landings accounted for 43 percent of total landings in the South Atlantic Region (45 million pounds) in 2014. Blue crab and shrimp had the highest annual landings in the South Atlantic Region in 2014, with 34 million pounds and 16 million pounds, respectively. Together they accounted

¹ 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).

² Commercial economic impacts data were not available for East Florida; data for the entire state of Florida are reported here.

for 47 percent of the total landings in 2014. From 2005 to 2014, landings of groupers experienced the largest decrease in landings (-45%). Species or species groups with large increases in landings include clams (135%), tunas (69%), oysters (56%) and swordfish (47%). From 2013 to 2014, landings of swordfish decreased the most (-21%). Species or species groups with large increases in landings included clams (201%) and flounders (73%).

Prices

Ex-vessel prices for blue crab (65%, 40% in real terms), shrimp (64%, 39% in real terms), and groupers (61%, 36% in real terms) experienced the biggest increases between 2005 and 2014. Only clams (-63%, -69% in real terms) and tunas (-6%, -20% in real terms) decreased during this 10-year period. Compared with the ex-vessel prices in 2013, only shrimp (up 13%) and clams (-63%) had significant price changes.

RECREATIONAL FISHERIES

In 2014, almost 2.7 million recreational anglers took 17.6 million fishing trips in the South Atlantic Region. Residents of a coastal county in the South Atlantic Region made up 81 percent of these anglers. Of the total fishing trips taken, 53 percent were from the shore sector and another 44 percent were from the private boat sector. The most frequently caught species or species groups in the South Atlantic Region included drum (Atlantic croaker and spot) and drum (spotted seatrout).

Key South Atlantic Region Recreational Species

- Atlantic croaker and spot
- Black sea bass
- Bluefish
- Dolphinfinh
- King mackerel
- Sharks
- Sheepshead porgy
- Red drum
- Spanish mackerel
- Spotted seatrout

Economic Impacts and Expenditures

The contribution of recreational fishing activities in the South Atlantic Region³ are reported in terms of economic impacts at the state level (employment, sales, income and value-added impacts) and expenditures on fishing trips and durable equipment at the regional level.

Employment impacts in East Florida were the highest in the Region with approximately 44,789 full- and part-time jobs generated by recreational fishing activities in the state. North Carolina (16,007 jobs) and South Carolina (6,224 jobs) followed in terms of employment impacts.

In addition to jobs, the contribution of recreational fishing activities to the South Atlantic Region's economy can be measured in terms of sales impacts and the contribution of these activities to gross domestic product (value-added impacts). In 2014, sales impacts were the highest in East Florida (\$4.8 billion in sales impacts), followed by North Carolina (\$1.5 billion). Value-added impacts were the highest in East Florida (\$3.1 billion), followed by North Carolina (\$0.99 billion).

Total saltwater fishing trip and durable equipment expenditures were \$6.3 billion across the South Atlantic Region in 2014. Approximately 83 percent of these expenditures were related to durable equipment purchases. The largest expenditures on durable goods were for boat expenses (\$3.1 billion), followed by fishing tackle (\$1.2 billion) and other equipment (\$502.9 million). Fishing trip-related expenditures by the South Atlantic Region's non-residents totaled \$483.6 million, of which the greatest portion can be attributed to trips in the shore sector (\$309.3 million). Residents of the South Atlantic Region spent \$569 million on trip-related expenses, with the greatest of these expenses related to the private boat sector (\$309.2 million).

Participation

There were 2.7 million recreational anglers who fished in the South Atlantic Region in 2014. This was a 12 percent decrease from 2005 (3.1 million anglers). These anglers were South Atlantic Region residents from either a coastal county (2.2 million anglers) or non-coastal county (530,000 anglers). About 81 percent of total anglers in 2014 were residents of a coastal county. Coastal county angler participation in 2014 decreased 16 percent compared with 2005 (2.6 million anglers) and increased 5 percent between 2013 and 2014. Non-coastal county angler participation increased 12 percent from 2005 (472,000 anglers) and increased 34 percent from 2013 (396,000 anglers).

³ Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/Marine-Angler-Durable-Expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

Fishing Trips

Recreational fishermen took 17.6 million fishing trips in the South Atlantic Region in 2014. This figure was a 16 percent decrease from 2005 and a 6 percent increase from the number of trips taken in 2013. Approximately 53 percent of the saltwater trips came in the shore sector. The other most popular mode of fishing was private boat with 44 percent of trips in 2014.

Harvest and Release

The South Atlantic Region's species and species groups caught most frequently in 2014 were drum (Atlantic croaker and spot, 10.5 million fish); drum (spotted seatrout, 5.4 million fish); and black sea bass (5.3 million fish). Between 2005 and 2014, five of the South Atlantic Region's key species or species groups showed decreases in catch totals, with the largest decreases occurring among king mackerel (-67%), dolphinfish (-33%), and drum (spotted seatrout, -32%). Large increases in the number of fish caught between 2005 and 2014 were observed in black sea bass (76%), porgies (sheepshead, 75%), and drum (Atlantic croaker and spot, 30%).

Recreational Fisheries Facts

Participation

- An average of 2.8 million anglers fished in the South Atlantic Region annually from 2005 to 2014.
- Coastal county residents made up 82 percent of total anglers in this region from 2005 to 2014.

Fishing Trips

- In the South Atlantic Region, an average of 19.4 million fishing trips were taken annually from 2005 to 2014.
- Private or rental boat trips accounted for 48% of trips from 2005 to 2014. Shore-based trips accounted for an additional 50 percent.

Harvest and Release

- Atlantic croaker and spot was the most commonly caught key species or species group, averaging 8.4 million fish over the 10-year period.
- The species or species group that was most commonly released was sharks (98% released).

MARINE ECONOMY

Note that when discussing the marine economy in the South Atlantic Region^{4,5}, all statistics include the entire state of Florida (not just East Florida). Across all

sectors of the economy in the South Atlantic Region, approximately 16 million full- and part-time employees were employed by about 1 million establishments in 2013. Annual payroll totaled \$651 billion. Total employee compensation in the South Atlantic Region totaled \$1 trillion, and the combined gross state product of all states totaled about \$1.9 trillion.⁶

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.⁷ 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 national CFLQ is 1. If a state is less than 1, then less commercial fishing occurs in this state than the national average. If a state is greater than 1, then more commercial fishing occurs in this state than the national average.

In 2013, the CFLQ for Florida was the highest in the Region at 1.04. Florida's CFLQ suggests that the level of employment in commercial fishing-related industries in this state is approximately 1.04 times higher than the level of employment in these industries nationwide. The 2013 CFLQ in North Carolina was second highest in the region at 0.11.

Seafood Sales and Processing

The number of non-employer firms (businesses that have no paid employees and are subject to federal income tax) engaged in seafood product preparation and packaging in the South Atlantic Region increased 96 percent to 448 firms in 2013, relative to 2005. The greatest number of these non-employer firms was located in Florida (300). Annual receipts increased 89 percent to about \$28 million in 2013 (a 45% increase in real terms). Employer establishments engaged in seafood product preparation and packaging decreased 23 percent from 2005 to 2013, to 43 firms. The biggest number of South Atlantic Region employer firms in this sector was located in Florida (25). The number of employees decreased 12 percent to 2,454. Annual payroll increased 3 percent to about \$91 million in 2013 (a 20% decrease in real terms).

⁴ Marine Economy information was not available for East Florida; information for the entire state of Florida is provided here.

⁵ Unless otherwise stated, data is from the U.S. Census Bureau, <http://censtats.census.gov/> (accessed September 15, 2014).

⁶ 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).

⁷ U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

Employer establishments in the wholesale seafood sales sector decreased 13 percent from 2005 to 2013, to 337. The largest number of wholesale establishments was located in Florida (234). The number of employees decreased 3 percent to 3,330. Annual payroll increased 5 percent to about \$128 million in 2013 (a 19% decrease in real terms).

The number of non-employer firms in the retail seafood sector in the South Atlantic Region increased 21 percent to 609 firms in 2013, relative to 2005. The greatest number of these non-employer firms was located in Florida (338). Annual receipts increased 10 percent to about \$48 million in 2013 (a 16% decrease in real terms). Employer establishments engaged in seafood retail decreased 6 percent from 2005 to 2013, to 367 firms. The biggest number of South Atlantic Region employer firms in this sector was located in Florida (165). The number of employees decreased 5 percent to 1,595. Annual payroll increased 26 percent to about \$36 million in 2013 (a 3% decrease in real terms).

Transport, Support and Marine Operations

The size of the Transport, Support and Marine Operations sectors in the South Atlantic Region is difficult to assess because much of the state-level data is suppressed for confidentiality purposes. It is clear, however, that these sectors play an important role in the regional economy. For example, there were 679 establishments classified as marinas, employing 6,871 workers and spending \$196 million on payroll in 2013 across all four states in the region. The Ship and Boat Building sector included 363 establishments, employment of 12,134 workers, and payroll of \$536 million across Florida, South Carolina and North Carolina. The vast majority of ship building activity occurred in Florida. In addition, the Marine Cargo Handling sector consisted of 99 establishments employing 9,244 workers and contributing \$310 million in payroll in Florida and Georgia alone.

Tables | South Atlantic Region



South Atlantic Region | Commercial Fisheries

2014 Economic Impacts of the South Atlantic Seafood Industry (thousands of dollars)

| | Landings Revenue | With Imports | | | | Without Imports | | | |
|----------------|------------------|--------------|------------|-----------|-------------|-----------------|-----------|---------|-------------|
| | | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Florida | 53,368 | 92,858 | 18,317,052 | 3,434,238 | 6,135,060 | 12,241 | 1,059,989 | 279,380 | 429,336 |
| Georgia | 15,424 | 13,998 | 1,916,044 | 426,208 | 700,572 | 2,117 | 97,251 | 38,289 | 52,101 |
| North Carolina | 94,067 | 11,451 | 989,955 | 278,195 | 414,144 | 6,829 | 327,987 | 136,312 | 180,406 |
| South Carolina | 21,487 | 2,035 | 170,997 | 50,013 | 73,648 | 1,407 | 74,281 | 30,299 | 40,354 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 131,414 | 140,682 | 152,400 | 165,872 | 147,338 | 165,686 | 171,306 | 171,026 | 161,223 | 184,346 |
| Finfish & Other | 56,907 | 60,707 | 61,339 | 60,813 | 63,163 | 65,931 | 66,228 | 63,962 | 60,678 | 67,109 |
| Shellfish | 74,507 | 79,976 | 91,061 | 105,059 | 84,176 | 99,756 | 105,078 | 107,064 | 100,545 | 117,237 |
| Key Species | | | | | | | | | | |
| Blue crab | 31,784 | 27,050 | 33,634 | 40,206 | 37,784 | 36,301 | 33,862 | 37,619 | 44,155 | 46,230 |
| Clams | 4,779 | 4,223 | 4,039 | 3,862 | 3,516 | 3,809 | 3,396 | 3,457 | 3,695 | 4,157 |
| Flounders | 10,974 | 13,317 | 11,375 | 10,928 | 10,171 | 10,885 | 8,942 | 7,428 | 7,080 | 13,470 |
| Groupers | 2,814 | 3,416 | 4,565 | 4,084 | 3,214 | 3,022 | 3,027 | 2,611 | 2,605 | 2,499 |
| King mackerels | 5,551 | 6,495 | 6,872 | 7,695 | 8,088 | 7,585 | 6,580 | 5,559 | 5,213 | 5,504 |
| Oysters | 3,305 | 3,853 | 3,806 | 4,028 | 4,603 | 7,175 | 6,850 | 5,135 | 6,015 | 7,146 |
| Shrimp | 31,035 | 39,653 | 43,807 | 51,072 | 33,082 | 46,148 | 53,652 | 54,969 | 38,671 | 50,080 |
| Snappers | 3,314 | 2,748 | 3,922 | 4,554 | 4,024 | 3,497 | 3,757 | 3,842 | 3,687 | 3,883 |
| Swordfish | 3,134 | 2,753 | 4,298 | 3,661 | 4,821 | 7,519 | 9,400 | 9,482 | 7,207 | 5,656 |
| Tunas | 3,904 | 4,692 | 4,894 | 4,672 | 4,869 | 3,681 | 5,096 | 7,036 | 5,980 | 6,233 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|--------|---------|
| Total Landings | 123,421 | 114,661 | 105,285 | 116,714 | 113,563 | 119,675 | 123,657 | 108,133 | 91,916 | 105,343 |
| Finfish & Other | 64,925 | 52,056 | 46,631 | 44,025 | 51,237 | 52,601 | 49,160 | 39,557 | 36,771 | 44,859 |
| Shellfish | 58,497 | 62,604 | 58,654 | 72,689 | 62,327 | 67,074 | 74,497 | 68,576 | 55,145 | 60,484 |
| Key Species | | | | | | | | | | |
| Blue crab | 38,218 | 36,779 | 34,045 | 45,150 | 39,016 | 39,013 | 42,127 | 40,396 | 32,776 | 33,847 |
| Clams | 747 | 685 | 663 | 628 | 611 | 641 | 569 | 621 | 583 | 1,753 |
| Flounders | 5,944 | 6,282 | 4,778 | 5,034 | 5,278 | 5,020 | 4,130 | 2,740 | 2,734 | 4,726 |
| Groupers | 1,007 | 1,152 | 1,416 | 1,266 | 992 | 884 | 774 | 665 | 612 | 557 |
| King mackerels | 3,106 | 3,792 | 3,736 | 4,352 | 4,858 | 4,247 | 3,048 | 2,456 | 1,898 | 2,259 |
| Oysters | 730 | 808 | 776 | 857 | 938 | 1,439 | 1,233 | 897 | 1,034 | 1,140 |
| Shrimp | 16,048 | 22,080 | 21,235 | 23,343 | 20,110 | 23,204 | 22,940 | 22,374 | 13,804 | 15,809 |
| Snappers | 1,286 | 967 | 1,354 | 1,515 | 1,373 | 1,196 | 1,246 | 1,229 | 1,148 | 1,149 |
| Swordfish | 1,152 | 1,036 | 1,417 | 1,307 | 1,800 | 2,288 | 2,611 | 2,746 | 2,161 | 1,699 |
| Tunas | 1,569 | 2,360 | 2,310 | 1,658 | 1,945 | 1,805 | 2,209 | 2,501 | 2,367 | 2,659 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------|------|------|------|------|------|------|------|------|------|------|
| Blue crab | 0.83 | 0.74 | 0.99 | 0.89 | 0.97 | 0.93 | 0.80 | 0.93 | 1.35 | 1.37 |
| Clams | 6.40 | 6.16 | 6.09 | 6.15 | 5.76 | 5.94 | 5.97 | 5.57 | 6.34 | 2.37 |
| Flounders | 1.85 | 2.12 | 2.38 | 2.17 | 1.93 | 2.17 | 2.17 | 2.71 | 2.59 | 2.85 |
| Groupers | 2.79 | 2.97 | 3.22 | 3.23 | 3.24 | 3.42 | 3.91 | 3.93 | 4.25 | 4.48 |
| King mackerels | 1.79 | 1.71 | 1.84 | 1.77 | 1.66 | 1.79 | 2.16 | 2.26 | 2.75 | 2.44 |
| Oysters | 4.53 | 4.77 | 4.91 | 4.70 | 4.91 | 4.99 | 5.55 | 5.72 | 5.82 | 6.27 |
| Shrimp | 1.93 | 1.80 | 2.06 | 2.19 | 1.65 | 1.99 | 2.34 | 2.46 | 2.80 | 3.17 |
| Snappers | 2.58 | 2.84 | 2.90 | 3.01 | 2.93 | 2.92 | 3.02 | 3.13 | 3.21 | 3.38 |
| Swordfish | 2.72 | 2.66 | 3.03 | 2.80 | 2.68 | 3.29 | 3.60 | 3.45 | 3.33 | 3.33 |
| Tunas | 2.49 | 1.99 | 2.12 | 2.82 | 2.50 | 2.04 | 2.31 | 2.81 | 2.53 | 2.34 |

2014 Economic Impacts of the South Atlantic Recreational Fishing Expenditures (thousands of dollars, trips)

| | Trips | #Jobs | Sales | Income | Value Added |
|----------------|-------|--------|-----------|-----------|-------------|
| East Florida | 9,644 | 44,789 | 4,782,488 | 2,022,279 | 3,122,289 |
| Georgia | 827 | 2,145 | 189,737 | 88,010 | 135,562 |
| North Carolina | 4,954 | 16,007 | 1,529,378 | 636,034 | 989,793 |
| South Carolina | 2,221 | 6,224 | 545,375 | 219,815 | 344,307 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 1,183,389 |
| For-Hire | 129,838 | 24,738 | Other Equipment | 502,857 |
| Private Boat | 44,471 | 309,190 | Boat Expenses | 3,116,069 |
| Shore | 309,252 | 235,098 | Vehicle Expenses | 376,857 |
| Total | 483,562 | 569,026 | Second Home Expenses | 42,114 |
| | | | Total Durable Expenditures | 5,221,286 |
| Total State Trip and Durable Goods Expenditures | | | | 6,273,874 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 2,615 | 2,603 | 3,158 | 2,330 | 1,922 | 1,932 | 1,893 | 2,136 | 2,092 | 2,189 |
| Non-Coastal | 472 | 477 | 493 | 560 | 462 | 536 | 451 | 502 | 396 | 530 |
| Out-of-State | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Total Anglers | 3,087 | 3,080 | 3,651 | 2,890 | 2,384 | 2,468 | 2,344 | 2,638 | 2,488 | 2,719 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| For-Hire | 502 | 455 | 503 | 415 | 391 | 367 | 373 | 349 | 336 | 415 |
| Private | 9,897 | 9,823 | 11,537 | 10,910 | 8,923 | 9,513 | 8,664 | 8,774 | 7,879 | 7,836 |
| Shore | 10,620 | 11,250 | 9,956 | 10,469 | 9,371 | 9,184 | 8,639 | 8,670 | 8,403 | 9,395 |
| Total Trips | 21,019 | 21,528 | 21,996 | 21,794 | 18,685 | 19,064 | 17,676 | 17,793 | 16,618 | 17,646 |

Harvest (H) & Release (R) of Key Species Species Groups (thousands of fish)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Black sea bass | H | 623 | 579 | 435 | 348 | 270 | 510 | 336 | 291 | 247 | 338 |
| | R | 2,388 | 2,511 | 2,865 | 2,567 | 1,907 | 2,594 | 3,032 | 4,376 | 2,864 | 4,967 |
| Bluefish | H | 2,077 | 1,488 | 1,916 | 1,691 | 1,587 | 2,348 | 1,936 | 1,379 | 1,895 | 1,802 |
| | R | 2,750 | 3,199 | 4,089 | 3,085 | 2,557 | 4,267 | 3,455 | 2,368 | 3,682 | 3,412 |
| Dolphinfish | H | 1,019 | 1,017 | 1,078 | 1,025 | 727 | 825 | 824 | 801 | 521 | 574 |
| | R | 202 | 185 | 394 | 188 | 98 | 128 | 354 | 126 | 168 | 244 |
| Drum (Atlantic croaker and spot) | H | 4,210 | 4,981 | 4,576 | 5,516 | 2,817 | 1,945 | 3,075 | 2,795 | 3,314 | 4,255 |
| | R | 3,882 | 6,756 | 3,774 | 4,182 | 4,867 | 3,335 | 4,183 | 3,560 | 5,786 | 6,280 |
| Drum(spotted seatrout) | H | 1,479 | 1,505 | 1,546 | 1,633 | 1,410 | 932 | 859 | 1,691 | 1,067 | 876 |
| | R | 6,409 | 5,264 | 5,554 | 5,166 | 4,170 | 5,771 | 4,889 | 6,519 | 4,289 | 4,524 |
| King mackerel | H | 392 | 490 | 818 | 483 | 421 | 234 | 154 | 150 | 100 | 128 |
| | R | 194 | 199 | 300 | 169 | 96 | 77 | 48 | 27 | 23 | 68 |
| Porgies (sheepshead) | H | 539 | 392 | 639 | 694 | 626 | 704 | 662 | 522 | 594 | 736 |
| | R | 420 | 419 | 547 | 693 | 509 | 496 | 519 | 628 | 745 | 944 |
| Red drum | H | 484 | 319 | 413 | 463 | 277 | 607 | 493 | 459 | 634 | 588 |
| | R | 2,613 | 2,035 | 1,838 | 2,414 | 1,870 | 3,321 | 2,137 | 2,966 | 3,069 | 2,957 |
| Sharks ² | H | 93 | 34 | 50 | 36 | 38 | 29 | 26 | 18 | 41 | 48 |
| | R | 2,870 | 2,453 | 2,319 | 2,757 | 2,312 | 2,739 | 1,643 | 1,944 | 3,364 | 2,515 |
| Spanish mackerel | H | 932 | 654 | 1,061 | 1,315 | 1,126 | 1,073 | 869 | 820 | 1,054 | 863 |
| | R | 618 | 274 | 607 | 886 | 519 | 604 | 395 | 424 | 679 | 485 |

¹ NA = data are not available because out-of-state resident information is collected for individual states but does not specify whether an angler resides in a region.

² Sharks include species within the requiem shark family, blacktip sharks, Atlantic sharpnose sharks and unidentified sharks.

Tables | East Florida



2014 Economic Impacts of the Florida Seafood Industry (thousands of dollars)¹

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|------------|-----------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 92,858 | 18,317,052 | 3,434,238 | 6,135,060 | 12,241 | 1,059,989 | 279,380 | 429,336 |
| Commercial Harvesters | 7,921 | 510,330 | 160,460 | 213,356 | 7,921 | 510,330 | 160,460 | 213,356 |
| Seafood Processors & Dealers | 5,381 | 863,388 | 167,091 | 328,486 | 640 | 110,089 | 21,306 | 41,885 |
| Importers | 48,133 | 13,240,472 | 2,122,038 | 4,036,275 | - | - | - | - |
| Seafood Wholesalers & Distributors | 11,710 | 1,333,732 | 523,618 | 651,451 | 533 | 60,718 | 23,837 | 29,657 |
| Retail | 19,712 | 2,369,130 | 461,031 | 905,493 | 3,146 | 378,853 | 73,777 | 144,438 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 35,489 | 42,002 | 42,767 | 47,856 | 40,992 | 51,151 | 60,643 | 57,766 | 48,669 | 53,368 |
| Finfish & Other | 16,496 | 17,422 | 19,768 | 21,131 | 23,164 | 25,756 | 26,344 | 26,061 | 24,139 | 24,358 |
| Shellfish | 18,993 | 24,580 | 23,000 | 26,726 | 17,828 | 25,395 | 34,300 | 31,705 | 24,530 | 29,010 |
| Key Species | | | | | | | | | | |
| Blue crab | 4,648 | 3,701 | 4,924 | 4,333 | 2,376 | 3,415 | 4,155 | 4,747 | 3,785 | 2,881 |
| Clams | 390 | 435 | 391 | 510 | 415 | 331 | 220 | 138 | 28 | 53 |
| Grouper | 587 | 521 | 923 | 724 | 583 | 561 | 556 | 764 | 631 | 596 |
| King mackerel | 3,456 | 4,318 | 4,833 | 6,036 | 6,563 | 6,911 | 5,500 | 4,685 | 4,320 | 4,260 |
| Lobsters | 1,624 | 2,462 | 2,488 | 3,312 | 1,089 | 2,825 | 3,207 | 1,720 | 3,437 | 4,691 |
| Sharks | 1,201 | 1,364 | 726 | 636 | 949 | 757 | 677 | 458 | 491 | 550 |
| Shrimp | 11,118 | 16,390 | 13,821 | 17,225 | 12,455 | 17,071 | 24,361 | 21,903 | 14,125 | 18,097 |
| Snappers | 1,009 | 972 | 1,279 | 1,905 | 2,383 | 1,454 | 1,673 | 1,604 | 1,769 | 2,084 |
| Spanish mackerel | 2,198 | 2,094 | 2,332 | 1,827 | 2,004 | 2,414 | 2,686 | 2,448 | 2,650 | 2,620 |
| Swordfish | 1,625 | 1,219 | 2,529 | 2,339 | 2,385 | 3,677 | 4,005 | 4,838 | 3,287 | 2,704 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Landings | 22,964 | 27,021 | 25,196 | 26,307 | 27,501 | 29,713 | 31,244 | 28,579 | 21,415 | 23,165 |
| Finfish & Other | 12,815 | 13,848 | 13,893 | 14,111 | 16,105 | 17,137 | 16,051 | 14,241 | 12,553 | 13,094 |
| Shellfish | 10,149 | 13,173 | 11,303 | 12,196 | 11,396 | 12,576 | 15,193 | 14,338 | 8,862 | 10,072 |
| Key Species | | | | | | | | | | |
| Blue crab | 4,045 | 3,130 | 4,063 | 3,342 | 1,640 | 2,553 | 3,226 | 3,440 | 2,211 | 1,373 |
| Clams | 42 | 47 | 41 | 55 | 54 | 42 | 22 | 17 | 5 | 7 |
| Grouper | 207 | 166 | 274 | 204 | 165 | 150 | 139 | 190 | 150 | 134 |
| King mackerel | 1,833 | 2,572 | 2,631 | 3,299 | 4,064 | 3,905 | 2,633 | 2,143 | 1,547 | 1,690 |
| Lobsters | 313 | 407 | 361 | 506 | 298 | 481 | 514 | 302 | 486 | 498 |
| Sharks | 1,292 | 1,472 | 818 | 776 | 1,109 | 781 | 716 | 631 | 657 | 665 |
| Shrimp | 5,203 | 8,843 | 6,174 | 7,619 | 8,662 | 8,743 | 10,528 | 8,869 | 5,044 | 5,757 |
| Snappers | 407 | 355 | 461 | 635 | 805 | 510 | 564 | 523 | 572 | 632 |
| Spanish mackerel | 3,134 | 3,143 | 3,264 | 2,263 | 2,629 | 3,553 | 3,433 | 2,586 | 2,246 | 2,563 |
| Swordfish | 543 | 407 | 772 | 791 | 838 | 1,028 | 1,067 | 1,343 | 831 | 746 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|------|------|------|------|------|------|------|------|------|------|
| Blue crab | 1.15 | 1.18 | 1.21 | 1.30 | 1.45 | 1.34 | 1.29 | 1.38 | 1.71 | 2.10 |
| Clams | 9.27 | 9.20 | 9.52 | 9.29 | 7.73 | 7.90 | 9.84 | 8.17 | 6.00 | 7.74 |
| Grouper | 2.84 | 3.14 | 3.37 | 3.55 | 3.53 | 3.73 | 3.99 | 4.02 | 4.20 | 4.46 |
| King mackerel | 1.89 | 1.68 | 1.84 | 1.83 | 1.61 | 1.77 | 2.09 | 2.19 | 2.79 | 2.52 |
| Lobsters | 5.18 | 6.06 | 6.90 | 6.55 | 3.65 | 5.87 | 6.23 | 5.69 | 7.07 | 9.41 |
| Sharks | 0.93 | 0.93 | 0.89 | 0.82 | 0.86 | 0.97 | 0.95 | 0.73 | 0.75 | 0.83 |
| Shrimp | 2.14 | 1.85 | 2.24 | 2.26 | 1.44 | 1.95 | 2.31 | 2.47 | 2.80 | 3.14 |
| Snappers | 2.48 | 2.74 | 2.78 | 3.00 | 2.96 | 2.85 | 2.97 | 3.07 | 3.09 | 3.30 |
| Spanish mackerel | 0.70 | 0.67 | 0.71 | 0.81 | 0.76 | 0.68 | 0.78 | 0.95 | 1.18 | 1.02 |
| Swordfish | 2.99 | 3.00 | 3.28 | 2.96 | 2.85 | 3.58 | 3.75 | 3.60 | 3.96 | 3.63 |

¹ Information reported in this table is for the state of Florida, not East Florida.

2014 Economic Impacts of East Florida Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|-----------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 1,338 | 146,821 | 60,999 | 89,171 |
| | Private Boat | 2,507 | 267,696 | 100,595 | 165,805 |
| | Shore | 1,665 | 165,419 | 62,353 | 103,188 |
| Total Durable Expenditures | | 39,279 | 4,202,552 | 1,798,332 | 2,764,125 |
| Total State Economic Impacts | | 44,789 | 4,782,488 | 2,022,279 | 3,122,289 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 790,080 |
| For-Hire | 72,413 | 9,245 | Other Equipment | 345,761 |
| Private Boat | 16,082 | 169,175 | Boat Expenses | 2,162,105 |
| Shore | 58,753 | 63,508 | Vehicle Expenses | 259,948 |
| Total | 147,248 | 241,929 | Second Home Expenses | 18,383 |
| | | | Total Durable Expenditures | 3,576,276 |
| Total State Trip and Durable Goods Expenditures | | | | 3,965,453 |

Recreational Anglers by Residential Area (thousands of anglers)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 1,565 | 1,660 | 2,168 | 1,317 | 1,099 | 1,033 | 1,109 | 1,181 | 1,263 | 1,334 |
| Non-Coastal | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Out-of-State | 945 | 935 | 1,008 | 703 | 643 | 629 | 553 | 514 | 540 | 807 |
| Total Anglers | 2,510 | 2,595 | 3,176 | 2,020 | 1,742 | 1,662 | 1,662 | 1,695 | 1,803 | 2,141 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|--------|--------|--------|--------|--------|--------|--------|-------|-------|-------|
| For-Hire | 193 | 171 | 169 | 137 | 149 | 118 | 124 | 144 | 156 | 193 |
| Private | 6,064 | 5,913 | 7,157 | 6,452 | 5,394 | 5,706 | 5,298 | 5,028 | 4,643 | 4,951 |
| Shore | 5,092 | 5,543 | 5,277 | 4,651 | 4,577 | 4,393 | 4,735 | 4,219 | 4,183 | 4,500 |
| Total Trips | 11,349 | 11,627 | 12,603 | 11,240 | 10,120 | 10,217 | 10,157 | 9,391 | 8,982 | 9,644 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Bluefish | H | 444 | 434 | 471 | 377 | 623 | 787 | 556 | 278 | 409 | 525 |
| | R | 368 | 718 | 932 | 499 | 680 | 1,621 | 912 | 1,111 | 1,493 | 1,457 |
| Dolphinfish | H | 353 | 492 | 513 | 661 | 328 | 248 | 347 | 433 | 297 | 369 |
| | R | 200 | 161 | 373 | 185 | 77 | 118 | 346 | 106 | 163 | 240 |
| Drum (kingfish) | H | 998 | 838 | 854 | 949 | 409 | 720 | 936 | 825 | 972 | 1,212 |
| | R | 903 | 706 | 1,099 | 552 | 608 | 935 | 807 | 1,102 | 1,115 | 1,252 |
| Drum (spotted seatrout) | H | 379 | 331 | 278 | 182 | 172 | 252 | 287 | 427 | 335 | 308 |
| | R | 4,246 | 3,316 | 3,094 | 2,830 | 1,642 | 2,937 | 2,141 | 3,026 | 1,940 | 2,400 |
| Gray snapper | H | 397 | 445 | 689 | 352 | 225 | 161 | 187 | 210 | 639 | 611 |
| | R | 1,047 | 1,326 | 2,073 | 1,551 | 1,706 | 497 | 678 | 1,549 | 1,992 | 2,054 |
| Jack (Florida pompano) | H | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| | R | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| King mackerel | H | 242 | 340 | 515 | 349 | 292 | 183 | 133 | 114 | 73 | 99 |
| | R | 118 | 158 | 226 | 125 | 52 | 59 | 45 | 21 | 16 | 51 |
| Porgies (sheepshead) | H | 389 | 243 | 255 | 237 | 227 | 352 | 287 | 267 | 253 | 573 |
| | R | 289 | 313 | 307 | 466 | 354 | 337 | 358 | 475 | 471 | 704 |
| Red drum | H | 196 | 146 | 161 | 159 | 80 | 175 | 180 | 239 | 298 | 275 |
| | R | 1,406 | 848 | 758 | 889 | 521 | 1,414 | 1,051 | 799 | 1,542 | 1,649 |
| Spanish mackerel | H | 513 | 323 | 456 | 503 | 369 | 513 | 406 | 247 | 533 | 382 |
| | R | 249 | 141 | 197 | 364 | 150 | 282 | 147 | 89 | 366 | 208 |

¹ NA = Data is not available because all East Florida residents are considered coastal county residents.² In this table, '0' = 0-999 thousand fish.

East Florida's State Economy (% of national total)¹

| | #Establishments | #Employees | Annual Payroll (million \$) | Employee Compensation (million \$) | Gross State Product (million \$) | Commercial Fishing Location Quotient ² |
|---------|-----------------|------------------|--------------------------------|---------------------------------------|-------------------------------------|---|
| 2005 | 504,662 (6.7%) | 7,107,378 (6.1%) | 239.20 (5.3%) | 382.54 (5.4%) | 700.22 (5.4%) | 1.00 |
| 2013 | 510,389 (6.8%) | 7,134,644 (6%) | 294.14 (5.2%) | 440.33 (5%) | 800.70 (4.8%) | 1.04 |
| %Change | 1.1 | 0.4 | 18.7 | 13.1 | 12.5 | 4.0 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Firms | 164 | 174 | 173 | 202 | 217 | 280 | 294 | 307 | 300 |
| | Receipts | 8,756 | 10,184 | 10,497 | 11,065 | 12,473 | 14,635 | 14,618 | 17,557 | 17,214 |
| Seafood sales, retail | Firms | 247 | 251 | 319 | 331 | 316 | 361 | 362 | 383 | 338 |
| | Receipts | 22,787 | 20,708 | 27,557 | 26,087 | 25,667 | 27,964 | 29,037 | 30,765 | 25,332 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 25 | 22 | 20 | 23 | 25 | 27 | 24 | 27 | 25 |
| | Employees | 1,616 | 1,704 | 1,748 | 1,637 | 1,143 | 1,269 | 1,095 | 1,608 | 1,374 |
| | Payroll | 47,529 | 62,801 | 58,233 | 53,455 | 46,235 | 45,772 | 42,612 | 51,735 | 50,003 |
| Seafood sales, wholesale | Establishments | 258 | 259 | 267 | 229 | 215 | 229 | 250 | 226 | 234 |
| | Employees | 1,883 | 2,091 | 2,308 | 1,913 | 1,762 | 1,747 | 1,913 | 1,957 | 1,878 |
| | Payroll | 65,339 | 73,897 | 85,019 | 75,203 | 72,159 | 70,889 | 77,115 | 75,945 | 79,266 |
| Seafood sales, retail | Establishments | 176 | 173 | 169 | 168 | 158 | 145 | 145 | 151 | 165 |
| | Employees | 970 | 936 | 989 | 991 | 885 | 865 | 849 | 945 | 909 |
| | Payroll | 19,192 | 19,513 | 20,595 | 21,604 | 21,182 | 20,783 | 20,158 | 21,577 | 23,476 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)³

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 59 | 54 | 47 | 42 | 42 | 50 | 54 | 60 | 47 |
| | Employees | 1,150 | 1,217 | 1,242 | 1,106 | 972 | 709 | 753 | 1,381 | 1,050 |
| | Payroll | 71,420 | 91,638 | 94,429 | 50,115 | 37,774 | 50,217 | 53,341 | 100,402 | 82,078 |
| Deep sea freight transportation | Establishments | 69 | 73 | 69 | 57 | 58 | 61 | 65 | 75 | 69 |
| | Employees | 2,622 | 3,729 | 3,190 | 2,486 | 2,801 | 2,279 | 2,374 | 3,345 | 2,485 |
| | Payroll | 207,300 | 226,810 | 208,144 | 169,055 | 180,139 | 159,025 | 177,386 | 231,887 | 140,564 |
| Deep sea passenger transportation | Establishments | 31 | 37 | 34 | 31 | 33 | 29 | 29 | 39 | 31 |
| | Employees | 8,492 | 9,077 | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | 504,625 | 571,590 | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 551 | 513 | 493 | 442 | 428 | 430 | 411 | 432 | 444 |
| | Employees | 5,069 | 5,494 | 4,935 | 5,024 | 4,665 | 4,439 | 4,657 | 4,918 | 5,076 |
| | Payroll | 133,384 | 146,390 | 148,592 | 151,677 | 132,955 | 133,017 | 142,997 | 148,573 | 145,265 |
| Marine cargo handling | Establishments | 63 | 66 | 53 | 56 | 59 | 55 | 64 | 43 | 58 |
| | Employees | 6,409 | 7,266 | 6,585 | 8,052 | 7,288 | 7,547 | 7,484 | 4,598 | 6,258 |
| | Payroll | 177,983 | 189,020 | 173,788 | 192,473 | 185,309 | 191,560 | 195,458 | 86,461 | 188,997 |
| Navigational services to shipping | Establishments | 148 | 142 | 145 | 147 | 145 | 145 | 150 | 151 | 180 |
| | Employees | 660 | 781 | 1,484 | 894 | 829 | 980 | 1,047 | 853 | 1,390 |
| | Payroll | 42,200 | 48,370 | 61,470 | 56,917 | 60,641 | 76,853 | 75,561 | 68,366 | 130,893 |
| Port & harbor operations | Establishments | 31 | 27 | 29 | 40 | 32 | 34 | 32 | 66 | 61 |
| | Employees | 973 | 584 | 459 | 712 | 527 | 470 | 377 | 2,082 | 555 |
| | Payroll | 22,606 | 19,417 | 12,872 | 24,668 | 19,006 | 20,525 | 16,879 | 72,554 | 25,439 |
| Ship & boat building | Establishments | 312 | 301 | 296 | 297 | 261 | 248 | 246 | 258 | 259 |
| | Employees | 12,729 | 12,385 | 12,332 | 12,419 | 8,221 | 7,363 | 7,909 | 8,621 | 8,813 |
| | Payroll | 454,209 | 427,888 | 469,382 | 442,096 | 296,537 | 302,909 | 325,942 | 374,831 | 390,853 |

¹ All data presented on this page are for the entire state of Florida, not just East Florida.² The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.³ ds = these data are suppressed.

Tables | Georgia



2014 Economic Impacts of the Georgia Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|--------|--------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 13,998 | 1,916,044 | 426,208 | 700,572 | 2,117 | 97,251 | 38,289 | 52,101 |
| Commercial Harvesters | 716 | 26,959 | 9,282 | 13,315 | 716 | 26,959 | 9,282 | 13,315 |
| Seafood Processors & Dealers | 1,195 | 93,335 | 35,970 | 47,481 | 228 | 17,836 | 6,874 | 9,074 |
| Importers | 5,135 | 1,412,614 | 226,398 | 430,626 | - | - | - | - |
| Seafood Wholesalers & Distributors | 1,092 | 133,178 | 45,929 | 64,544 | 40 | 4,916 | 1,695 | 2,383 |
| Retail | 5,861 | 249,959 | 108,629 | 144,605 | 1,133 | 47,540 | 20,438 | 27,329 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 13,465 | 11,534 | 11,331 | 13,081 | 11,761 | 13,731 | 16,179 | 16,625 | 11,822 | 15,424 |
| Finfish & Other | 729 | 574 | 625 | 623 | 626 | 279 | 146 | 180 | 516 | 165 |
| Shellfish | 12,736 | 10,960 | 10,706 | 12,458 | 11,135 | 13,452 | 16,033 | 16,445 | 11,306 | 15,258 |
| Key Species | | | | | | | | | | |
| Blue crab | 3,096 | 2,959 | 3,767 | 3,910 | 3,839 | 2,648 | 3,341 | 4,259 | 3,996 | 3,509 |
| Clams | 658 | 298 | 290 | 383 | 473 | 430 | 605 | 603 | 563 | 1,192 |
| Groupers | NA | NA | 123 | NA | NA | NA | NA | NA | NA | NA |
| Shrimp | 8,936 | 7,640 | 6,446 | 7,877 | 6,608 | 10,103 | 11,398 | 11,045 | 5,776 | 10,074 |
| Snails (conchs) | 3 | 6 | 1 | 6 | 11 | 27 | 39 | 27 | 1 | NA |
| Snappers | NA | NA | 269 | NA | NA | NA | NA | NA | NA | NA |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-------|-------|-------|-------|-------|-------|--------|--------|--------|--------|
| Total Landings | 9,638 | 8,294 | 7,908 | 8,930 | 7,424 | 7,220 | 12,795 | 10,557 | 10,573 | 11,283 |
| Finfish & Other | 401 | 285 | 304 | 267 | 306 | 168 | 83 | 111 | 116 | 108 |
| Shellfish | 9,237 | 8,009 | 7,603 | 8,663 | 7,118 | 7,053 | 12,712 | 10,447 | 10,457 | 11,176 |
| Key Species | | | | | | | | | | |
| Blue crab | 4,302 | 4,091 | 4,421 | 4,227 | 3,598 | 2,329 | 3,427 | 4,265 | 3,229 | 2,403 |
| Clams | 112 | 46 | 49 | 54 | 76 | 81 | 107 | 98 | 105 | 1,308 |
| Groupers | NA | NA | 37 | NA | NA | NA | NA | NA | NA | NA |
| Shrimp | 4,531 | 3,851 | 2,797 | 3,132 | 3,324 | 4,553 | 4,355 | 3,928 | 1,901 | 2,797 |
| Snails (conchs) | 3 | 5 | 1 | 5 | 11 | 18 | 30 | 18 | 1 | NA |
| Snappers | NA | NA | 93 | NA | NA | NA | NA | NA | NA | NA |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|------|------|------|------|------|------|------|------|------|------|
| Blue crab | 0.72 | 0.72 | 0.85 | 0.92 | 1.07 | 1.14 | 0.97 | 1.00 | 1.24 | 1.46 |
| Clams | 5.85 | 6.49 | 5.89 | 7.03 | 6.24 | 5.30 | 5.68 | 6.18 | 5.34 | 0.91 |
| Groupers | NA | NA | 3.33 | NA | NA | NA | NA | NA | NA | NA |
| Shrimp | 1.97 | 1.98 | 2.30 | 2.51 | 1.99 | 2.22 | 2.62 | 2.81 | 3.04 | 3.60 |
| Snails (conchs) | 1.03 | 1.22 | 1.25 | 1.31 | 1.00 | 1.50 | 1.30 | 1.52 | 1.65 | NA |
| Snappers | NA | NA | 2.89 | NA | NA | NA | NA | NA | NA | NA |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of Georgia Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|--------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 144 | 13,493 | 5,377 | 7,639 |
| | Private Boat | 158 | 15,202 | 5,778 | 9,465 |
| | Shore | 247 | 23,607 | 8,631 | 14,116 |
| Total Durable Expenditures | | 1,596 | 137,435 | 68,224 | 104,342 |
| Total State Economic Impacts | | 2,145 | 189,737 | 88,010 | 135,562 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 3,589 | 3,524 | Fishing Tackle | 48,614 |
| Private Boat | 907 | 12,499 | Other Equipment | 15,305 |
| Shore | 4,339 | 12,855 | Boat Expenses | 56,319 |
| Total | 8,835 | 28,877 | Vehicle Expenses | 27,581 |
| | | | Second Home Expenses | 0 |
| | | | Total Durable Expenditures | 147,820 |
| Total State Trip and Durable Goods Expenditures | | | | 185,532 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 135 | 121 | 149 | 190 | 146 | 145 | 146 | 134 | 99 | 125 |
| Non-Coastal | 67 | 66 | 115 | 154 | 91 | 136 | 131 | 96 | 72 | 115 |
| Out-of-State | 43 | 33 | 45 | 98 | 45 | 61 | 78 | 74 | 53 | 70 |
| Total Anglers | 245 | 220 | 309 | 442 | 282 | 342 | 355 | 304 | 224 | 310 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|------|------|-------|-------|------|------|------|------|------|------|
| For-Hire | 25 | 29 | 31 | 17 | 16 | 7 | 16 | 20 | 21 | 31 |
| Private | 538 | 480 | 577 | 731 | 516 | 530 | 620 | 496 | 387 | 340 |
| Shore | 370 | 289 | 421 | 456 | 311 | 335 | 335 | 376 | 283 | 456 |
| Total Trips | 933 | 798 | 1,029 | 1,204 | 843 | 872 | 971 | 892 | 691 | 827 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|---|------|------|-------|------|------|------|------|-------|------|------|
| Black drum | H | 20 | 20 | 51 | 92 | 15 | 70 | 11 | 19 | 19 | 15 |
| | R | 11 | 29 | 35 | 65 | 23 | 40 | 5 | 20 | 10 | 8 |
| Black sea bass | H | 86 | 67 | 35 | 99 | 18 | 14 | 44 | 15 | 81 | 37 |
| | R | 218 | 184 | 292 | 581 | 112 | 162 | 226 | 135 | 295 | 528 |
| Bluefish | H | 4 | 3 | 11 | 8 | 1 | 13 | 3 | 6 | 3 | 20 |
| | R | 21 | 23 | 103 | 117 | 72 | 107 | 70 | 52 | 7 | 120 |
| Drum (Atlantic croaker) | H | 39 | 34 | 45 | 38 | 82 | 35 | 44 | 38 | 55 | 64 |
| | R | 281 | 284 | 229 | 294 | 435 | 264 | 262 | 168 | 299 | 471 |
| Drum (southern kingfish) | H | 511 | 448 | 575 | 697 | 587 | 585 | 873 | 377 | 396 | 441 |
| | R | 563 | 668 | 625 | 873 | 559 | 465 | 668 | 605 | 287 | 245 |
| Drum (spotted seatrout) | H | 242 | 378 | 577 | 642 | 506 | 384 | 290 | 527 | 237 | 256 |
| | R | 642 | 809 | 1,039 | 721 | 915 | 742 | 552 | 1,029 | 321 | 774 |
| Porgies (sheepshead) | H | 65 | 36 | 59 | 65 | 52 | 104 | 138 | 59 | 42 | 21 |
| | R | 57 | 52 | 85 | 98 | 32 | 38 | 45 | 29 | 39 | 18 |
| Red drum | H | 105 | 69 | 113 | 133 | 69 | 195 | 107 | 46 | 74 | 93 |
| | R | 334 | 137 | 226 | 314 | 168 | 483 | 213 | 90 | 199 | 290 |
| Sharks ² | H | 5 | 5 | 9 | 11 | 7 | 3 | 6 | 4 | 6 | 0 |
| | R | 394 | 438 | 592 | 541 | 343 | 283 | 341 | 366 | 266 | 314 |
| Southern flounder | H | 38 | 23 | 92 | 49 | 34 | 35 | 28 | 18 | 19 | 14 |
| | R | 8 | 17 | 0 | 1 | 10 | 3 | 12 | 5 | 7 | 9 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.² Sharks include species within the requiem shark family, blacktip sharks, Atlantic sharpnose sharks and unidentified sharks.

Georgia's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (million \$) | Employee Compensation (million \$) | Gross State Product (million \$) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|--------------------------------|---------------------------------------|-------------------------------------|---|
| 2005 | 220,528 (2.9%) | 3,489,046 (3%) | 128.83 (2.9%) | 204.06 (2.9%) | 376.63 (2.9%) | 0.18 |
| 2013 | 217,559 (2.9%) | 3,458,050 (2.9%) | 154.63 (2.8%) | 249.02 (2.8%) | 456.48 (2.7%) | 0.07 |
| %Change | -1.4 | -0.9 | 16.7 | 18.1 | 17.5 | -61.1 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 24 | 21 | 34 | 45 | 51 | 52 | 61 | 71 | 60 |
| | Receipts | 2,642 | 1,957 | 2,187 | 3,489 | 3,817 | 5,458 | 5,540 | 4,974 | 4,378 |
| Seafood sales, retail | Firms | 64 | 78 | 87 | 101 | 98 | 96 | 89 | 97 | 77 |
| | Receipts | 6,625 | 7,180 | 8,671 | 6,922 | 5,701 | 6,474 | 8,646 | 8,233 | 6,932 |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 11 | 8 | 6 | 7 | 6 | 6 | 5 | 6 | 5 |
| | Employees | 1,155 | 1,164 | 0 | 0 | 0 | 1,056 | 1,022 | 854 | 945 |
| | Payroll | 39,839 | 43,637 | 0 | 0 | 0 | 37,343 | 39,433 | 32,928 | 35,987 |
| Seafood sales, wholesale | Establishments | 29 | 30 | 42 | 30 | 33 | 36 | 28 | 18 | 28 |
| | Employees | 640 | 659 | 688 | 565 | 532 | 514 | 562 | 468 | 469 |
| | Payroll | 32,781 | 31,654 | 31,033 | 20,122 | 18,628 | 20,075 | 20,660 | 15,459 | 17,326 |
| Seafood sales, retail | Establishments | 59 | 55 | 44 | 48 | 42 | 48 | 51 | 54 | 60 |
| | Employees | 185 | 184 | 179 | 160 | 162 | 176 | 176 | 214 | 210 |
| | Payroll | 2,753 | 2,724 | 2,633 | 2,433 | 2,447 | 2,502 | 2,566 | 3,425 | 3,390 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

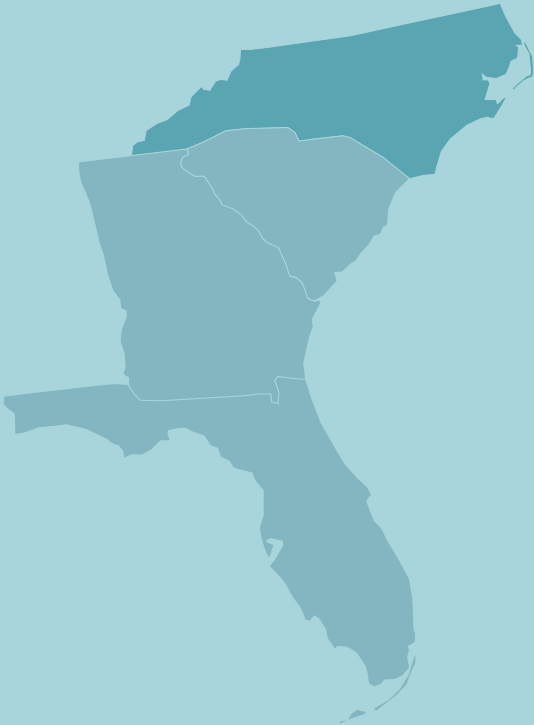
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|---------|---------|--------|--------|--------|---------|--------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 7 | 6 | 6 | 6 | 5 | 4 | 4 | 3 | 4 |
| | Employees | ds | ds | 33 | 28 | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | 1,883 | 2,040 | 1,700 | ds | ds | ds | ds |
| Deep sea freight transportation | Establishments | 19 | 15 | 13 | 14 | 13 | 14 | 12 | 12 | 7 |
| | Employees | 193 | ds | 132 | 156 | 29 | ds | 51 | 236 | 28 |
| | Payroll | 10,658 | ds | 10,090 | 11,275 | 2,192 | 2,465 | 4,833 | 11,238 | 2,311 |
| Deep sea passenger transportation | Establishments | 0 | 0 | 1 | 0 | 0 | 0 | 1 | 1 | 1 |
| | Employees | NA | NA | ds | NA | NA | NA | ds | ds | ds |
| | Payroll | NA | NA | ds | NA | NA | NA | ds | ds | ds |
| Marinas | Establishments | 60 | 66 | 68 | 60 | 58 | 62 | 63 | 63 | 59 |
| | Employees | ds | ds | 569 | 527 | 541 | 631 | 580 | 636 | 644 |
| | Payroll | ds | ds | 12,701 | 15,571 | 15,736 | 17,428 | 16,986 | 17,921 | 17,768 |
| Marine cargo handling | Establishments | 17 | 17 | 17 | 17 | 18 | 17 | 20 | 10 | 19 |
| | Employees | 2,350 | 3,003 | 2,501 | 2,660 | 3,707 | 2,971 | 4,655 | ds | 2,986 |
| | Payroll | 80,706 | 104,596 | 110,857 | 97,869 | 87,410 | 84,675 | 108,674 | ds | 120,985 |
| Navigational services to shipping | Establishments | 8 | 10 | 11 | 11 | 9 | 8 | 8 | 10 | 8 |
| | Employees | 136 | ds | 217 | 182 | ds | ds | ds | ds | ds |
| | Payroll | 7,784 | ds | 11,141 | 10,193 | 12,185 | 11,237 | ds | ds | ds |
| Port & harbor operations | Establishments | 6 | 5 | 4 | 5 | 5 | 4 | 2 | 13 | 7 |
| | Employees | ds | 196 | 98 | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | 3,303 | 3,108 | ds | ds | ds | ds | ds | ds |
| Ship & boat building | Establishments | 17 | 16 | 21 | 20 | 14 | 12 | 15 | 14 | 15 |
| | Employees | ds | 1,967 | 2,225 | 2,159 | ds | ds | ds | ds | ds |
| | Payroll | ds | 64,667 | 68,646 | 69,096 | ds | ds | ds | ds | ds |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not applicable.

Tables | North Carolina



2014 Economic Impacts of the North Carolina Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|---------|---------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 11,451 | 989,955 | 278,195 | 414,144 | 6,829 | 327,987 | 136,312 | 180,406 |
| Commercial Harvesters | 2,905 | 159,095 | 65,153 | 88,368 | 2,905 | 159,095 | 65,153 | 88,368 |
| Seafood Processors & Dealers | 1,322 | 87,907 | 34,179 | 44,166 | 541 | 35,965 | 13,983 | 18,070 |
| Importers | 1,861 | 511,961 | 82,052 | 156,068 | - | - | - | - |
| Seafood Wholesalers & Distributors | 542 | 58,194 | 20,410 | 26,939 | 163 | 17,497 | 6,136 | 8,099 |
| Retail | 4,821 | 172,797 | 76,402 | 98,602 | 3,220 | 115,430 | 51,039 | 65,869 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 64,890 | 70,121 | 82,285 | 86,822 | 77,196 | 79,361 | 71,183 | 72,573 | 79,105 | 94,067 |
| Finfish & Other | 34,901 | 37,716 | 36,203 | 34,445 | 34,005 | 33,153 | 31,309 | 31,051 | 29,874 | 37,035 |
| Shellfish | 29,989 | 32,405 | 46,082 | 52,377 | 43,192 | 46,208 | 39,874 | 41,523 | 49,232 | 57,032 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 3,409 | 3,563 | 2,714 | 3,142 | 3,004 | 3,491 | 3,164 | 2,136 | 1,724 | 1,866 |
| Black sea bass | 1,332 | 1,715 | 1,195 | 1,156 | 1,401 | 953 | 628 | 688 | 869 | 1,409 |
| Blue crab | 20,274 | 17,087 | 21,432 | 27,555 | 27,429 | 26,425 | 21,282 | 22,809 | 30,007 | 34,028 |
| Clams | 2,798 | 2,656 | 2,660 | 2,435 | 2,086 | 2,359 | 1,933 | 2,131 | 2,349 | 2,913 |
| Flounders | 10,963 | 13,301 | 11,335 | 10,886 | 10,124 | 10,845 | 8,890 | 7,421 | 7,059 | 13,058 |
| Groupers | 1,214 | 1,559 | 1,995 | 1,939 | 1,609 | 1,512 | 1,302 | 1,206 | 1,041 | 1,057 |
| King mackerel | 2,054 | 2,120 | 1,967 | 1,632 | 1,500 | 650 | 1,062 | 831 | 877 | 1,204 |
| Shrimp | 4,409 | 9,141 | 17,905 | 19,251 | 8,528 | 10,804 | 10,886 | 13,333 | 12,947 | 14,144 |
| Snappers | 1,116 | 953 | 1,601 | 1,784 | 1,073 | 963 | 1,004 | 900 | 917 | 865 |
| Tunas | 3,321 | 4,060 | 4,046 | 3,393 | 2,922 | 1,193 | 2,437 | 4,398 | 3,207 | 3,617 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Landings | 79,607 | 68,744 | 62,871 | 71,209 | 68,955 | 71,994 | 67,487 | 56,671 | 50,191 | 61,943 |
| Finfish & Other | 49,435 | 35,675 | 30,440 | 27,706 | 32,421 | 32,519 | 29,806 | 22,782 | 22,076 | 29,497 |
| Shellfish | 30,172 | 33,069 | 32,432 | 43,503 | 36,534 | 39,474 | 37,681 | 33,889 | 28,115 | 32,446 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 11,903 | 10,397 | 7,271 | 5,792 | 6,135 | 7,312 | 5,054 | 3,107 | 1,928 | 2,630 |
| Black sea bass | 690 | 778 | 473 | 485 | 615 | 401 | 272 | 256 | 330 | 527 |
| Blue crab | 25,430 | 25,343 | 21,425 | 32,917 | 29,707 | 30,683 | 30,035 | 26,787 | 22,203 | 26,231 |
| Clams | 418 | 427 | 438 | 400 | 359 | 366 | 302 | 404 | 356 | 438 |
| Flounders | 5,937 | 6,272 | 4,754 | 5,009 | 5,256 | 5,001 | 4,102 | 2,736 | 2,728 | 4,584 |
| Groupers | 481 | 587 | 701 | 683 | 553 | 493 | 366 | 327 | 261 | 252 |
| King mackerel | 1,246 | 1,186 | 1,059 | 1,037 | 778 | 329 | 408 | 297 | 345 | 550 |
| Shrimp | 2,358 | 5,737 | 9,537 | 9,427 | 5,408 | 5,955 | 5,140 | 6,141 | 4,860 | 4,691 |
| Snappers | 433 | 345 | 550 | 603 | 374 | 320 | 326 | 279 | 276 | 251 |
| Tunas | 1,271 | 1,982 | 1,836 | 1,041 | 1,028 | 703 | 1,056 | 1,482 | 1,283 | 1,647 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------|------|------|------|------|------|------|------|------|------|------|
| Atlantic croaker | 0.29 | 0.34 | 0.37 | 0.54 | 0.49 | 0.48 | 0.63 | 0.69 | 0.89 | 0.71 |
| Black sea bass | 1.93 | 2.21 | 2.53 | 2.39 | 2.28 | 2.38 | 2.31 | 2.69 | 2.64 | 2.67 |
| Blue crab | 0.80 | 0.67 | 1.00 | 0.84 | 0.92 | 0.86 | 0.71 | 0.85 | 1.35 | 1.30 |
| Clams | 6.69 | 6.21 | 6.08 | 6.09 | 5.82 | 6.44 | 6.39 | 5.28 | 6.61 | 6.65 |
| Flounders | 1.85 | 2.12 | 2.38 | 2.17 | 1.93 | 2.17 | 2.17 | 2.71 | 2.59 | 2.85 |
| Groupers | 2.52 | 2.65 | 2.84 | 2.84 | 2.91 | 3.07 | 3.56 | 3.69 | 3.98 | 4.20 |
| King mackerel | 1.65 | 1.79 | 1.86 | 1.57 | 1.93 | 1.98 | 2.60 | 2.79 | 2.54 | 2.19 |
| Shrimp | 1.87 | 1.59 | 1.88 | 2.04 | 1.58 | 1.81 | 2.12 | 2.17 | 2.66 | 3.02 |
| Snappers | 2.58 | 2.76 | 2.91 | 2.96 | 2.87 | 3.01 | 3.08 | 3.22 | 3.32 | 3.44 |
| Tunas | 2.61 | 2.05 | 2.20 | 3.26 | 2.84 | 1.70 | 2.31 | 2.97 | 2.50 | 2.20 |

2014 Economic Impacts of North Carolina Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 518 | 48,746 | 19,370 | 27,801 |
| | Private Boat | 1,306 | 130,556 | 48,423 | 79,353 |
| | Shore | 3,977 | 374,571 | 133,010 | 220,401 |
| Total Durable Expenditures | | 10,206 | 975,505 | 435,231 | 662,238 |
| Total State Economic Impacts | | 16,007 | 1,529,378 | 636,034 | 989,793 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 21,844 | 7,328 | Fishing Tackle | 252,564 |
| Private Boat | 18,533 | 97,311 | Other Equipment | 101,316 |
| Shore | 138,121 | 136,693 | Boat Expenses | 716,278 |
| Total | 178,499 | 241,332 | Vehicle Expenses | 65,582 |
| | | | Second Home Expenses | 23,731 |
| | | | Total Durable Expenditures | 1,159,471 |
| Total State Trip and Durable Goods Expenditures | | | | 1,579,302 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 685 | 588 | 564 | 587 | 446 | 544 | 490 | 614 | 564 | 549 |
| Non-Coastal | 285 | 265 | 265 | 303 | 259 | 296 | 254 | 283 | 240 | 301 |
| Out-of-State | 1,280 | 1,374 | 1,079 | 1,079 | 976 | 1,073 | 755 | 764 | 601 | 805 |
| Total Anglers | 2,250 | 2,227 | 1,908 | 1,969 | 1,681 | 1,913 | 1,499 | 1,661 | 1,405 | 1,655 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 259 | 234 | 218 | 192 | 146 | 165 | 152 | 160 | 111 | 97 |
| Private | 2,346 | 2,452 | 2,671 | 2,461 | 2,005 | 2,199 | 1,899 | 2,061 | 2,101 | 1,707 |
| Shore | 3,938 | 4,178 | 3,445 | 4,246 | 3,158 | 3,313 | 2,690 | 3,083 | 2,756 | 3,150 |
| Total Trips | 6,543 | 6,864 | 6,334 | 6,899 | 5,309 | 5,677 | 4,741 | 5,304 | 4,968 | 4,954 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Black sea bass | H | 231 | 125 | 110 | 58 | 107 | 139 | 95 | 76 | 50 | 74 |
| | R | 1,195 | 1,176 | 952 | 560 | 667 | 1,104 | 1,063 | 2,085 | 1,368 | 1,334 |
| Bluefish | H | 1,382 | 917 | 1,258 | 1,178 | 828 | 1,104 | 1,153 | 889 | 1,184 | 1,085 |
| | R | 2,044 | 1,836 | 2,377 | 2,136 | 1,553 | 2,221 | 1,923 | 1,036 | 1,873 | 1,537 |
| Dolphinfish | H | 663 | 522 | 533 | 358 | 367 | 499 | 472 | 327 | 212 | 185 |
| | R | 2 | 24 | 5 | 2 | 3 | 5 | 8 | 2 | 3 | 4 |
| Drum (Atlantic croaker and spot) | H | 3,340 | 3,535 | 3,539 | 2,163 | 1,425 | 1,312 | 1,454 | 1,073 | 1,876 | 2,653 |
| | R | 2,736 | 5,167 | 2,805 | 2,742 | 3,134 | 2,469 | 2,798 | 2,014 | 3,298 | 3,605 |
| Drum (spotted seatrout) | H | 586 | 565 | 531 | 655 | 608 | 195 | 216 | 501 | 369 | 234 |
| | R | 1,059 | 595 | 849 | 881 | 1,213 | 1,685 | 1,916 | 1,647 | 1,427 | 961 |
| Flounder (lefteye and summer) | H | 156 | 150 | 190 | 71 | 100 | 143 | 92 | 106 | 91 | 145 |
| | R | 878 | 925 | 1,090 | 1,689 | 1,213 | 1,586 | 990 | 1,397 | 1,529 | 1,059 |
| King mackerel | H | 139 | 143 | 269 | 105 | 91 | 37 | 15 | 28 | 23 | 23 |
| | R | 73 | 32 | 44 | 25 | 12 | 7 | 1 | 3 | 5 | 10 |
| Spanish mackerel | H | 336 | 306 | 495 | 744 | 678 | 484 | 368 | 491 | 497 | 398 |
| | R | 180 | 96 | 259 | 449 | 312 | 294 | 171 | 235 | 289 | 241 |
| Striped bass | H | 137 | 99 | 49 | 36 | 12 | 34 | 106 | 8 | 20 | 8 |
| | R | 124 | 63 | 82 | 175 | 121 | 108 | 296 | 176 | 124 | 95 |
| Yellowfin tuna | H | 181 | 166 | 102 | 26 | 29 | 23 | 26 | 57 | 45 | 28 |
| | R | 8 | 13 | 1 | 0 | 1 | 1 | 0 | 4 | 1 | 4 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.

North Carolina | Marine Economy

North Carolina's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 216,994 (2.9%) | 3,409,968 (2.9%) | 115.74 (2.6%) | 189.56 (2.7%) | 357.71 (2.7%) | 0.11 |
| 2013 | 218,285 (2.9%) | 3,421,195 (2.9%) | 143.34 (2.6%) | 238.87 (2.7%) | 467.07 (2.8%) | 0.11 |
| %Change | 0.6 | 0.3 | 19.3 | 20.6 | 23.4 | 0.0 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|--------|--------|--------|--------|--------|-------|--------|--------|--------|
| Seafood product prep. & packaging | Firms | 26 | 27 | 30 | ds | 34 | 40 | 50 | 46 | 58 |
| | Receipts | 1,106 | 1,084 | 1,813 | ds | 1,297 | 1,652 | 2,705 | 1,630 | 4,605 |
| Seafood sales, retail | Firms | 130 | 115 | 150 | 114 | 140 | 126 | 144 | 136 | 127 |
| | Receipts | 10,913 | 11,342 | 14,999 | 10,918 | 12,188 | 9,057 | 10,386 | 11,990 | 12,175 |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 17 | 18 | 22 | 18 | 16 | 16 | 14 | 12 | 13 |
| | Employees | 0 | 475 | 0 | 232 | 170 | 171 | 0 | 0 | 135 |
| | Payroll | 0 | 11,563 | 12,659 | 5,373 | 4,461 | 4,749 | 4,830 | 5,084 | 4,563 |
| Seafood sales, wholesale | Establishments | 77 | 70 | 71 | 65 | 66 | 66 | 64 | 59 | 59 |
| | Employees | 703 | 582 | 597 | 559 | 584 | 590 | 603 | 793 | 849 |
| | Payroll | 17,577 | 16,543 | 15,655 | 16,843 | 17,383 | 18,348 | 19,344 | 23,949 | 26,687 |
| Seafood sales, retail | Establishments | 90 | 89 | 86 | 90 | 77 | 82 | 84 | 88 | 86 |
| | Employees | 316 | 250 | 241 | 219 | 243 | 247 | 244 | 289 | 254 |
| | Payroll | 4,185 | 4,129 | 4,170 | 4,143 | 4,494 | 5,017 | 5,250 | 5,860 | 5,872 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

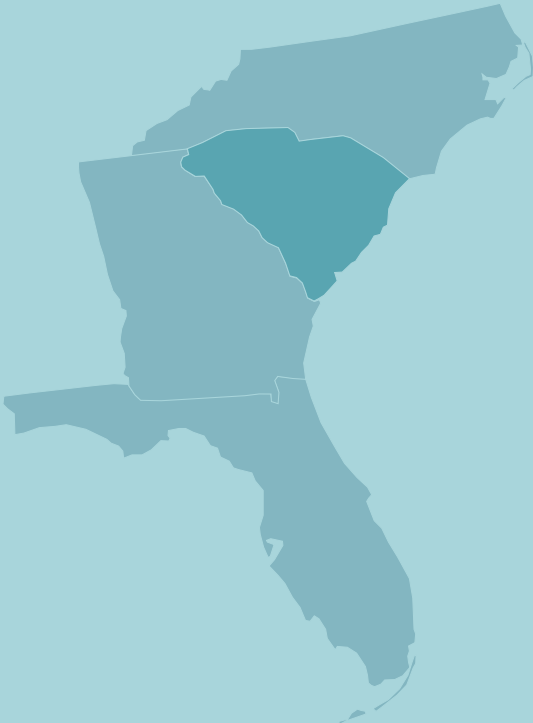
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|--------|---------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 5 | 4 | 6 | 4 | 6 | 4 | 5 | 6 | 5 |
| | Employees | ds | ds | 54 | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | 2,061 | ds | 2,366 | ds | ds | ds | ds |
| Deep sea freight transportation | Establishments | 7 | 8 | 6 | 5 | 6 | 10 | 8 | 7 | 8 |
| | Employees | ds | ds | ds | ds | 9 | ds | ds | 25 | ds |
| | Payroll | ds | ds | 510 | 533 | 617 | ds | ds | 1,579 | ds |
| Deep sea passenger transportation | Establishments | 2 | 1 | 1 | 0 | 1 | 0 | 1 | 0 | 0 |
| | Employees | ds | ds | ds | NA | ds | NA | ds | NA | NA |
| | Payroll | ds | ds | ds | NA | ds | NA | ds | NA | NA |
| Marinas | Establishments | 103 | 103 | 96 | 107 | 105 | 102 | 104 | 102 | 99 |
| | Employees | 654 | 681 | 522 | 656 | 501 | 536 | 524 | 531 | 501 |
| | Payroll | 16,530 | 16,616 | 14,922 | 17,164 | 15,858 | 16,238 | 16,187 | 15,975 | 16,369 |
| Marine cargo handling | Establishments | 12 | 9 | 13 | 13 | 12 | 11 | 14 | 6 | 9 |
| | Employees | 641 | 757 | 652 | 760 | 914 | 600 | ds | ds | ds |
| | Payroll | 25,988 | 19,736 | 25,164 | 23,328 | 20,707 | 20,755 | ds | ds | ds |
| Navigational services to shipping | Establishments | 8 | 7 | 14 | 10 | 11 | 13 | 11 | 8 | 10 |
| | Employees | ds | ds | 102 | 87 | 96 | 94 | 86 | 90 | 77 |
| | Payroll | ds | ds | 3,773 | 3,668 | 4,313 | 3,968 | 4,041 | 3,203 | 3,583 |
| Port & harbor operations | Establishments | 5 | 5 | 3 | 3 | 2 | 4 | 3 | 9 | 5 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | 46 |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | 1,579 |
| Ship & boat building | Establishments | 65 | 74 | 78 | 77 | 64 | 60 | 57 | 60 | 52 |
| | Employees | 3,957 | 4,232 | ds | 4,281 | 1,983 | 1,501 | 1,515 | 1,760 | 1,059 |
| | Payroll | 133,665 | 153,672 | ds | 138,243 | 68,004 | 64,807 | 66,929 | 74,843 | 49,462 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not applicable.

Tables | South Carolina



South Carolina | Commercial Fisheries

2014 Economic Impacts of the South Carolina Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|---------|--------|-------------|-----------------|--------|--------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 2,035 | 170,997 | 50,013 | 73,648 | 1,407 | 74,281 | 30,299 | 40,354 |
| Commercial Harvesters | 508 | 35,638 | 13,886 | 19,155 | 508 | 35,638 | 13,886 | 19,155 |
| Seafood Processors & Dealers | 131 | 9,908 | 3,876 | 4,984 | 104 | 7,846 | 3,069 | 3,947 |
| Importers | 290 | 79,785 | 12,787 | 24,322 | - | - | - | - |
| Seafood Wholesalers & Distributors | 91 | 9,177 | 3,224 | 4,235 | 36 | 3,663 | 1,287 | 1,690 |
| Retail | 1,015 | 36,489 | 16,240 | 20,953 | 759 | 27,134 | 12,056 | 15,563 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 17,570 | 17,025 | 16,017 | 17,872 | 17,256 | 21,205 | 23,300 | 24,061 | 21,627 | 21,487 |
| Finfish & Other | 4,781 | 4,995 | 4,744 | 4,614 | 5,338 | 6,740 | 8,429 | 6,670 | 6,149 | 5,550 |
| Shellfish | 12,789 | 12,031 | 11,274 | 13,259 | 11,918 | 14,465 | 14,871 | 17,391 | 15,478 | 15,937 |
| Key Species | | | | | | | | | | |
| Black sea bass | 191 | 168 | 236 | 257 | 362 | 213 | 182 | 303 | 434 | 321 |
| Blue crab | 3,766 | 3,304 | 3,511 | 4,187 | 4,059 | 3,593 | 5,084 | 5,804 | 6,367 | 5,811 |
| Clams | 934 | 834 | 697 | 535 | 542 | 688 | 638 | 584 | 755 | NA |
| Grouper | 1,013 | 1,335 | 1,524 | 1,421 | 1,021 | 949 | 1,169 | 640 | 933 | 846 |
| Oysters | 1,471 | 1,369 | 1,375 | 1,739 | 1,738 | 1,858 | 1,975 | 2,155 | 2,341 | 2,243 |
| Sharks | 136 | 144 | 78 | 78 | 56 | 123 | 166 | 136 | 76 | 73 |
| Shrimp | 6,572 | 6,481 | 5,634 | 6,712 | 5,487 | 8,168 | 7,008 | 8,688 | 5,823 | 7,765 |
| Snappers | 1,190 | 823 | 773 | 864 | 568 | 1,079 | 1,080 | 1,338 | 1,001 | 935 |
| Swordfish | NA | NA | NA | 187 | 1,116 | 1,944 | 2,777 | 1,635 | 983 | 842 |
| Tilefish | 143 | 271 | 5 | 66 | 9 | 25 | 8 | 128 | 379 | 475 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|-------|--------|-------|--------|--------|--------|-------|-------|
| Total Landings | 11,212 | 10,602 | 9,310 | 10,081 | 9,599 | 10,567 | 12,131 | 12,325 | 9,736 | 8,951 |
| Finfish & Other | 2,274 | 2,249 | 1,994 | 1,940 | 2,384 | 2,774 | 3,220 | 2,424 | 2,026 | 2,160 |
| Shellfish | 8,938 | 8,353 | 7,316 | 8,141 | 7,215 | 7,793 | 8,911 | 9,902 | 7,711 | 6,791 |
| Key Species | | | | | | | | | | |
| Black sea bass | 115 | 86 | 114 | 132 | 168 | 98 | 100 | 118 | 163 | 122 |
| Blue crab | 4,440 | 4,215 | 4,137 | 4,484 | 4,014 | 3,275 | 5,439 | 5,905 | 5,133 | 3,839 |
| Clams | 175 | 165 | 135 | 119 | 123 | 152 | 137 | 102 | 118 | NA |
| Grouper | 319 | 399 | 404 | 379 | 274 | 241 | 269 | 148 | 201 | 172 |
| Oysters | 308 | 291 | 285 | 324 | 309 | 332 | 337 | 362 | 376 | 339 |
| Sharks | 174 | 147 | 105 | 110 | 63 | 87 | 108 | 104 | 52 | 50 |
| Shrimp | 3,957 | 3,650 | 2,727 | 3,162 | 2,716 | 3,951 | 2,918 | 3,435 | 1,999 | 2,564 |
| Snappers | 447 | 267 | 250 | 277 | 194 | 365 | 356 | 427 | 299 | 266 |
| Swordfish | NA | NA | NA | 71 | 459 | 630 | 741 | 500 | 272 | 259 |
| Tilefish | 80 | 139 | 4 | 28 | 5 | 15 | 4 | 46 | 150 | 174 |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------|------|------|------|------|------|------|------|------|------|------|
| Black sea bass | 1.66 | 1.97 | 2.07 | 1.94 | 2.15 | 2.16 | 1.82 | 2.58 | 2.67 | 2.63 |
| Blue crab | 0.85 | 0.78 | 0.85 | 0.93 | 1.01 | 1.10 | 0.93 | 0.98 | 1.24 | 1.51 |
| Clams | 5.34 | 5.06 | 5.17 | 4.51 | 4.42 | 4.54 | 4.65 | 5.71 | 6.42 | NA |
| Grouper | 3.17 | 3.35 | 3.77 | 3.75 | 3.73 | 3.94 | 4.35 | 4.33 | 4.64 | 4.92 |
| Oysters | 4.78 | 4.71 | 4.82 | 5.36 | 5.63 | 5.60 | 5.85 | 5.96 | 6.23 | 6.61 |
| Sharks | 0.78 | 0.98 | 0.74 | 0.71 | 0.89 | 1.42 | 1.53 | 1.30 | 1.45 | 1.44 |
| Shrimp | 1.66 | 1.78 | 2.07 | 2.12 | 2.02 | 2.07 | 2.40 | 2.53 | 2.91 | 3.03 |
| Snappers | 2.66 | 3.08 | 3.09 | 3.12 | 2.92 | 2.95 | 3.03 | 3.13 | 3.34 | 3.52 |
| Swordfish | NA | NA | NA | 2.64 | 2.43 | 3.09 | 3.75 | 3.27 | 3.61 | 3.25 |
| Tilefish | 1.78 | 1.95 | 1.36 | 2.30 | 2.00 | 1.71 | 1.84 | 2.78 | 2.53 | 2.73 |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of South Carolina Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 625 | 56,195 | 23,189 | 32,457 |
| | Private Boat | 462 | 38,214 | 13,978 | 22,553 |
| | Shore | 1,809 | 158,309 | 55,154 | 93,398 |
| Total Durable Expenditures | | 3,328 | 292,657 | 127,494 | 195,899 |
| Total State Economic Impacts | | 6,224 | 545,375 | 219,815 | 344,307 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 31,992 | 4,641 | Fishing Tackle | 92,131 |
| Private Boat | 8,949 | 30,205 | Other Equipment | 40,475 |
| Shore | 108,039 | 22,042 | Boat Expenses | 181,367 |
| Total | 148,980 | 56,888 | Vehicle Expenses | 23,746 |
| | | | Second Home Expenses | 0 |
| | | | Total Durable Expenditures | 337,719 |
| Total State Trip and Durable Goods Expenditures | | | | 543,587 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 230 | 234 | 277 | 236 | 231 | 210 | 148 | 207 | 166 | 181 |
| Non-Coastal | 120 | 146 | 113 | 103 | 112 | 104 | 66 | 123 | 84 | 114 |
| Out-of-State | 448 | 617 | 551 | 604 | 554 | 494 | 264 | 406 | 602 | 569 |
| Total Anglers | 798 | 997 | 941 | 943 | 897 | 808 | 478 | 736 | 852 | 864 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 25 | 21 | 85 | 69 | 80 | 77 | 81 | 25 | 48 | 94 |
| Private | 949 | 978 | 1,132 | 1,266 | 1,008 | 1,078 | 847 | 1,189 | 748 | 838 |
| Shore | 1,220 | 1,240 | 813 | 1,116 | 1,325 | 1,143 | 879 | 992 | 1,181 | 1,289 |
| Total Trips | 2,194 | 2,239 | 2,030 | 2,451 | 2,413 | 2,298 | 1,807 | 2,206 | 1,977 | 2,221 |

Harvest (H) & Release (R) of Key Species Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------------------------|---|------|-------|------|-------|-------|-------|------|-------|-------|-------|
| Black sea bass | H | 74 | 182 | 125 | 90 | 37 | 216 | 56 | 91 | 24 | 108 |
| | R | 513 | 583 | 921 | 864 | 471 | 640 | 661 | 811 | 381 | 1,593 |
| Bluefish | H | 247 | 134 | 176 | 128 | 135 | 444 | 224 | 206 | 299 | 172 |
| | R | 317 | 622 | 677 | 333 | 252 | 318 | 550 | 169 | 309 | 298 |
| Drum (Atlantic croaker and spot) | H | 502 | 1,229 | 643 | 2,799 | 829 | 370 | 947 | 1,030 | 832 | 615 |
| | R | 504 | 1,092 | 376 | 394 | 840 | 354 | 464 | 358 | 1,751 | 1,207 |
| Drum (southern kingfish) | H | 998 | 926 | 699 | 823 | 1,056 | 389 | 609 | 778 | 1,195 | 698 |
| | R | 391 | 1,163 | 540 | 612 | 690 | 0 | 68 | 146 | 0 | 7 |
| Drum (spotted seatrout) | H | 272 | 231 | 160 | 154 | 124 | 101 | 66 | 236 | 126 | 78 |
| | R | 462 | 544 | 572 | 734 | 400 | 407 | 280 | 817 | 601 | 389 |
| Porgies (sheepshead) | H | 45 | 61 | 109 | 217 | 222 | 102 | 171 | 76 | 26 | 81 |
| | R | 47 | 27 | 21 | 60 | 23 | 58 | 93 | 45 | 81 | 150 |
| Red drum | H | 131 | 48 | 72 | 120 | 70 | 173 | 161 | 121 | 98 | 104 |
| | R | 494 | 540 | 437 | 553 | 751 | 787 | 665 | 543 | 674 | 636 |
| Sharks ² | H | 46 | 5 | 11 | 9 | 23 | 11 | 11 | 6 | 15 | 21 |
| | R | 889 | 966 | 418 | 475 | 804 | 1,171 | 389 | 672 | 1,162 | 845 |
| Southern flounder | H | 85 | 111 | 77 | 103 | 89 | 109 | 102 | 91 | 62 | 59 |
| | R | 73 | 200 | 106 | 103 | 74 | 0 | 17 | 35 | 0 | 0 |
| Spanish mackerel | H | 70 | 23 | 95 | 54 | 74 | 71 | 87 | 80 | 22 | 81 |
| | R | 185 | 28 | 97 | 68 | 56 | 28 | 67 | 98 | 24 | 35 |

¹ In this table, '0' = 0-999 thousand fish.

² Sharks include species within the requiem shark family, blacktip sharks, Atlantic sharpnose sharks and unidentified sharks.

South Carolina | Marine Economy

South Carolina's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|------------------------------|-------------------------------------|-----------------------------------|---|
| 2005 | 103,416 (1.4%) | 1,584,914 (1.4%) | 49.45 (1.1%) | 82.31 (1.2%) | 144.75 (1.1%) | 0.11 |
| 2013 | 101,545 (1.4%) | 1,583,213 (1.3%) | 59.30 (1.1%) | 102.54 (1.2%) | 182.40 (1.1%) | 0.07 |
| %Change | -1.8 | -0.1 | 16.6 | 19.7 | 20.6 | -36.4 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 14 | 12 | 12 | 15 | 21 | 23 | 32 | 35 | 30 |
| | Receipts | 2,234 | 1,303 | 857 | 1,155 | 1,794 | 1,386 | 1,326 | 1,868 | 1,657 |
| Seafood sales, retail | Firms | 61 | 76 | 75 | 64 | 77 | 78 | 87 | 67 | 67 |
| | Receipts | 3,588 | 3,427 | 3,876 | 4,650 | 4,709 | 3,978 | 5,535 | 4,818 | 3,765 |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)^{2,3}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Establishments | 3 | 3 | 5 | 2 | 2 | 2 | 1 | 0 | 0 |
| | Employees | 7 | 0 | 0 | 0 | 0 | 0 | 0 | NA | NA |
| | Payroll | 145 | 0 | 0 | 0 | 0 | 0 | 0 | NA | NA |
| Seafood sales, wholesale | Establishments | 22 | 19 | 26 | 20 | 15 | 16 | 12 | 15 | 16 |
| | Employees | 211 | 191 | 220 | 108 | 111 | 120 | 101 | 125 | 134 |
| | Payroll | 5,818 | 5,542 | 6,186 | 3,770 | 3,676 | 3,868 | 3,760 | 4,506 | 4,849 |
| Seafood sales, retail | Establishments | 64 | 62 | 60 | 64 | 57 | 56 | 61 | 60 | 56 |
| | Employees | 206 | 190 | 210 | 292 | 261 | 260 | 245 | 228 | 222 |
| | Payroll | 2,773 | 2,905 | 3,155 | 4,871 | 4,901 | 4,580 | 4,231 | 3,670 | 3,713 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|--------|---------|--------|--------|--------|--------|--------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 4 | 4 | 5 | 4 | 4 | 4 | 4 | 5 | 5 |
| | Employees | 45 | ds | 60 | ds | ds | ds | ds | 40 | ds |
| | Payroll | 1,882 | ds | 2,352 | ds | ds | ds | ds | 2,625 | ds |
| Deep sea freight transportation | Establishments | 10 | 9 | 6 | 4 | 8 | 7 | 6 | 6 | 4 |
| | Employees | 113 | ds | 67 | ds | ds | 20 | ds | ds | 21 |
| | Payroll | 4,600 | ds | 3,419 | 659 | ds | 758 | 722 | ds | 633 |
| Deep sea passenger transportation | Establishments | 1 | 1 | 1 | 7 | 6 | 2 | 2 | 1 | 0 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| Marinas | Establishments | 70 | 71 | 72 | 68 | 69 | 73 | 75 | 70 | 77 |
| | Employees | 398 | 452 | 469 | 588 | 533 | 537 | 543 | 595 | 650 |
| | Payroll | 8,050 | 10,105 | 11,498 | 13,753 | 12,642 | 13,786 | 15,805 | 15,408 | 16,147 |
| Marine cargo handling | Establishments | 18 | 17 | 15 | 17 | 14 | 12 | 14 | 10 | 13 |
| | Employees | 1,994 | 2,707 | 1,419 | 1,282 | 1,953 | 1,731 | 1,717 | 715 | ds |
| | Payroll | 66,767 | 83,142 | 75,967 | 56,812 | 43,170 | 39,625 | 49,172 | 30,381 | ds |
| Navigational services to shipping | Establishments | 7 | 8 | 6 | 8 | 8 | 7 | 8 | 10 | 8 |
| | Employees | ds | 155 | 152 | 227 | 208 | 222 | 217 | 247 | 221 |
| | Payroll | ds | 7,588 | 7,369 | 11,916 | 12,522 | 12,591 | 11,922 | 16,625 | 13,820 |
| Port & harbor operations | Establishments | 1 | 1 | 3 | 3 | 2 | 2 | 5 | 7 | 2 |
| | Employees | ds | ds | 113 | ds | ds | ds | ds | 676 | ds |
| | Payroll | ds | ds | 7,058 | ds | ds | ds | ds | 29,332 | ds |
| Ship & boat building | Establishments | 48 | 45 | 41 | 46 | 41 | 39 | 41 | 39 | 37 |
| | Employees | 2,672 | 2,425 | 2,962 | 3,001 | 1,929 | 1,922 | 1,943 | 1,980 | 2,262 |
| | Payroll | 97,087 | 92,098 | 102,531 | 97,743 | 73,988 | 74,945 | 85,568 | 90,942 | 96,081 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = data not available.

Gulf of Mexico Region

- Alabama
- West Florida
- Louisiana
- Mississippi
- Texas



Shrimp trawler, Galveston, Texas (1968)
(photo credit: Robert Brigham)

MANAGEMENT CONTEXT

The Gulf of Mexico Region includes Alabama, Louisiana, Mississippi, Texas and West Florida. Federal fisheries in this region are managed by the Gulf of Mexico Fishery Management Council (GMFMC) and NOAA Fisheries under seven fishery management plans (FMPs). The coastal migratory pelagic resources and spiny lobster fisheries are managed in conjunction with the South Atlantic Fishery Management Council (SAFMC).

FMPs in the Gulf of Mexico Region

1. Aquaculture
2. Coastal migratory pelagic resources (with SAFMC)
3. Corals
4. Red drum
5. Reef fish
6. Shrimp
7. Spiny lobster (with SAFMC)

Three stocks or stock complexes in the Gulf of Mexico Region were identified as overfished in 2014: gray triggerfish, greater amberjack and red snapper. Gag grouper was removed from the overfished list in 2014. Hogfish, gray triggerfish and greater amberjack were listed as subject to overfishing in 2014. The jacks complex was removed from the overfishing list in 2014.

CATCH SHARE PROGRAMS

Two catch share programs have been implemented in the Gulf of Mexico: the Red Snapper Individual Fishing Quota (IFQ) Program and the Grouper-Tilefish IFQ Program. Below is a description of these catch share programs and their performance.

The Red Snapper IFQ Program was implemented in 2007 to reduce overcapacity and mitigate derby fishing conditions. The key performance indicators of this program show that relative to the Baseline period (the 3-year period prior to implementation), the 2013 quota, landings, inflation-adjusted total revenue and inflation-adjusted total revenue per vessel increased. In contrast, the number of active vessels decreased during this period.

The Grouper-Tilefish IFQ Program was implemented in 2010 to reduce overcapacity and mitigate derby

fishing conditions in the grouper-tilefish segment of the commercial reef fish fishery. The key performance indicators of this Program show that relative to the Baseline period (the 3-year period prior to implementation), 2013 inflation-adjusted total revenue and inflation-adjusted revenue per active vessel increased. However, quota, landings and number of active vessels decreased during this period.

POLICY UPDATES

In May 2015, a final rule was established to increase the commercial and recreational quotas for red snapper in the Gulf of Mexico from 2015 to 2017. Unless the GMFMC changes this rule in the future, the values for 2017 will remain in effect for 2018 and beyond. The total allowable catch increased from 11 million pounds whole weight to 14.3 million pounds. The commercial and recreational quotas are based on the current allocation, which provides 51 percent of the allowable catch to the commercial sector and 49 percent to the recreational sector. Because the commercial sector is managed under the Red Snapper IFQ Program, the increased quota was allocated as pounds of red snapper among participating shareholders.

In addition, to ensure that the recreational sector does not exceed the red snapper quota, the GMFMC established a recreational catch target that is less than the recreational quota. NOAA Fisheries based the recreational fishing season on this catch target. The recreational sector was also divided into two components: the for-hire component and the private angling component. Each component has its own annual catch targets (2.371 million pounds for the for-hire component and 3.234 million pounds for the private angling component). In addition, each component has its own fishing season (44 days for the for-hire component and 10 days for the private angling component). Both components are managed under the same bag and size limits.

COMMERCIAL FISHERIES

In 2014, commercial fishermen in the Gulf of Mexico Region landed 1.1 billion pounds of finfish and shellfish, earning \$1 billion for their harvest. Landings revenue was dominated by shrimp (\$588 million), which made up 57 percent of revenue and 18 percent of landings. Other sig-

nificant contributors to regional landings included oysters (\$87 million), blue crab (\$73 million) and menhaden (\$71 million). Louisiana and Texas had the highest landings revenue in the region in 2014, with \$451 million and \$278 million, respectively. In terms of pounds landed, Louisiana had the highest landings with 778 million pounds, followed by Mississippi with 191 million pounds.

Key Gulf of Mexico Region Commercial Species

- Blue crab
- Crawfish
- Groupers
- Menhaden
- Mulletts
- Oysters
- Red snapper
- Shrimp
- Stone crab
- Tunas

Economic Impacts

In this report^{1,2}, the U.S. seafood industry includes the commercial harvest sector; seafood processors and dealers; seafood wholesalers and distributors; importers; and seafood retailers. In 2014, the Gulf of Mexico Region's seafood industry generated \$18.3 billion in sales impacts in Florida (including East and West Florida); \$2.9 billion in Texas; \$2.2 billion in Louisiana; \$661 million in Alabama; and \$199 million in Mississippi. Florida generated the largest employment (93,000 jobs), income (\$3.4 billion) and value-added (\$6.1 billion) impacts. The importers sector in Florida generated the greatest employment impacts with 48,000 jobs. Florida importers also generated higher sales impacts (\$13.2 billion) than any other sector in any another state in the region. In addition, this sector had the greatest value added impacts (\$4 billion).

Landings Revenue

Landings revenue in the Gulf of Mexico Region totaled \$1 billion in 2014. This figure represents a 64 percent increase (40% in real terms after adjusting for inflation) from 2005 levels and a 9 percent increase from 2013. Louisiana had the highest landing revenues (\$451 million), followed by Texas (\$278 million) and West Florida (\$203 million). Shellfish landings revenue totaled \$843 million in 2014, an increase of 68 percent (43% in real terms) from 2005 and a 14 percent increase from 2013. Shellfish landings revenue was greatest in Louisiana (\$363 million), followed by Texas (\$265 million) and

West Florida (\$113 million). Finfish landings revenue totaled \$184 million and was highest in Louisiana (\$88 million), followed by West Florida (\$70 million).

From 2005 to 2014, menhaden landings revenue increased 115 percent (83% in real terms), primarily due to prices more than doubling. Red snapper increased 104 percent (73% in real terms) during this period due to a combination of higher prices and landings. Red snapper landings were at their highest level since 1983, largely because the quota increased 120 percent from 2009 to 2014. Blue crab landings revenue almost doubled from 2005 to 2014 (up 93%, 64% in real terms). Only tuna landings revenue decreased over this 10-year period (-33%, -43% in real terms). Between 2013 and 2014, landings revenue for six out of the 10 key species or species groups increased. Landings revenue for groupers (23%, 21% in real terms) and blue crab (19%, 17% in real terms) increased the most during this period. Menhaden (-26%, -27% in real terms) and mullets (-22%, -23% in real terms) decreased the most.

Landings

Fishermen in the Gulf of Mexico Region landed 1.1 billion pounds of finfish and shellfish in 2014. This was a 5 percent decrease from 2005 and an 18 percent decrease from 2013. Finfish landings constituted 74 percent of total landings in the Gulf of Mexico Region (841 million pounds) in 2014, but decreased 23 percent from 2013 to 2014. Shellfish landings in 2014 were virtually unchanged from 2013 levels.

The regionally-managed menhaden fishery is the largest fishery by volume in the Gulf of Mexico (67% of total landings in 2014) but has only two participants — Omega Protein Inc. and Daybrook Fisheries Inc. These two companies own three seafood processing plants and the fishing vessels that prosecute the fishery. Menhaden landings decreased by 6 percent from 2005 to 2014 and by 25 percent from 2013 levels. The sizable decline from 2013 levels has been attributed to two main factors: poor weather during the early part of the menhaden season; and the tendency of several fish schools to remain in the estuaries in 2014 rather than migrate to the Gulf, as typically occurs late in the season.

¹ 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).

² Separate commercial economic impacts were not available for West Florida. Impacts for the entire state of Florida are reported here.

Commercial Fisheries Facts

Landings Revenue

- On average from 2005 to 2014, the key species or species groups accounted for 90 percent of total revenue, generating \$675 million in the Gulf of Mexico Region.
- Shrimp had higher landings revenues than any other species or species group, averaging \$409 million in landings revenue from 2005 to 2014.

Landings

- Key species or species groups contributed an average of 96 percent annually to total landings from 2005 to 2014, or 1.3 billion pounds annually.
- Menhaden contributed the most to landings in the region, averaging 967 million pounds from 2005 to 2014.

Prices

- Stone crab had the highest average annual ex-vessel price per pound from 2005 to 2014: \$5.51
- Menhaden had the lowest average annual ex-vessel price per pound from 2005 to 2014: \$0.07

The shrimp fishery is the second largest fishery in the Gulf, accounting for 18 percent of total landings in 2014. Despite this standing, shrimp landings decreased 4 percent from 2005 to 2014. During this same period, landings of mullets (51%) and red snapper (39%) increased significantly. Species or species groups with significantly lower landings during this period included stone crabs (-58%), tunas (-42%) and crawfish (-26%). Stone crabs (-50%), crawfish (-43%) and menhaden (-25%) had the largest landings declines between 2013 to 2014. Stone crab landings reached their lowest levels since 1971 with landings trending downward since 2011. Groupers were the only key species or species group with a sizable increase in landings (17%) from 2013 to 2014.

Prices

In 2014, all 10 key species in the region experienced ex-vessel prices that were higher than their 10-year averages (both nominal and real). Ex-vessel prices for stone crab (207%, 160% in real terms); menhaden (125%, 80% in real terms); crawfish (118%, 85% in real terms); and blue crab (103%, 73% in real terms)

increased the most between 2005 and 2014. Compared with ex-vessel prices in 2013, the Gulf of Mexico Region's stone crab (119%), crawfish (43%) and oysters (32%) experienced the greatest price increases. Nominally, 2014 shrimp prices were the highest on record. After adjusting for inflation, the 2014 ex-vessel price for Gulf shrimp hit its highest level since 2000, rising steadily from its record low in 2009. The rise in Gulf shrimp prices has been attributed to a number of factors, including the disruption in the Asian market due to the spread of "early mortality syndrome" (EMS), a bacteria that causes early death in shrimp. Global shrimp production fell 19 percent in 2013 (down almost 50 percent in Thailand, the world's largest shrimp exporter), but experienced a slight rise in 2014.

RECREATIONAL FISHERIES

In 2014, approximately 2.9 million recreational anglers took 21 million fishing trips in the Gulf of Mexico Region. Coastal county residents in the Gulf Region made up 91 percent of these anglers. Of the total fishing trips taken, 55 percent were from the private boat sector and 41 percent were from the shore sector. The most frequently caught species or species groups in the Gulf Region included drum (spotted seatrout) and red drum.

Key Gulf of Mexico Region Recreational Species

- | | |
|------------------------------|---------------------|
| • Atlantic croaker | • Sheepshead porgy |
| • Gulf and southern kingfish | • Southern flounder |
| • Red drum | • Spanish mackerel |
| • Red snapper | • Spotted seatrout |
| • Sand and silver seatrout | • Striped mullet |

Economic Impacts and Expenditures

The contribution of recreational fishing activities³ in the Gulf of Mexico Region is reported in terms of economic impacts at the state level (employment, sales, income and value-added impacts) and expenditures on fishing trips and durable equipment at the regional level. Employment impacts in West Florida were the highest in the region with approximately 70,109 full- and part-time jobs generated by recreational fishing activities. Texas (16,496 jobs) and Louisiana (15,241 jobs) followed in terms of employment impacts.

³ Trip expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Durable good expenditure impacts were generated from the 2014 National Marine Recreational Fishing Expenditure Survey (see <http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/Marine-Angler-Durable-Expenditures/2014-durable-expenditures-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 <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>).

In addition to jobs, the contribution of recreational fishing activities to the Gulf of Mexico Region's economy can be measured in terms of sales impacts and the contribution of these activities to gross domestic product (value-added impacts). In 2014, sales impacts were highest in West Florida (\$7.5 billion), followed by Texas (\$1.8 billion). Value-added impacts were highest in West Florida (\$4.9 billion), followed by Texas (\$1.2 billion).

In 2014, the total saltwater fishing trip and durable equipment expenditures were \$11.5 billion across the Gulf of Mexico Region. Approximately 87 percent of these expenditures were related to durable equipment purchases. The largest expenditures on durable goods were for boat expenses (\$5.8 billion), followed by fishing tackle (\$2.2 billion) and vehicle expenses (\$1 billion). Fishing trip-related expenditures by non-residents totaled \$645.7 million, of which the greatest portion can be attributed to trips in the for-hire sector (\$287.1 million). Residents of the Gulf of Mexico Region spent \$886.9 million on trip-related expenses with the greatest of these expenses related to the private boat sector (\$501 million).

Participation

Approximately 2.9 million recreational anglers fished in the Gulf of Mexico Region in 2014, a 13 percent decrease from 2005 (3.3 million anglers). These anglers were Gulf of Mexico Region residents from either a coastal county (2.6 million anglers) or non-coastal county (273,000 anglers). Residents of a coastal county in the Gulf Region made up 91 percent of total anglers in 2014. Participation by coastal county anglers in 2014 decreased 17 percent compared with 2005 (3.1 million anglers) and decreased 12 percent from 2013 to 2014. Participation by non-coastal county anglers in 2014 increased 44 percent compared with 2005 (190,000 anglers) and decreased 32 percent compared with 2013 (400,000 anglers).

Fishing Trips

Recreational fishermen took 21 million fishing trips in the Gulf of Mexico Region in 2014, a 10 percent decrease from 2005 and a 17 percent decrease from 2013. Approximately 55 percent of the saltwater trips occurred in the private boat sector. The second most popular fishing mode was shore fishing which made up

41 percent of trips in 2014.

Harvest and Release

Species and species groups caught most frequently in 2014 were drum (spotted seatrout, 15 million fish); red drum (5.6 million fish); and drum (Atlantic croaker, 4.9 million fish). From 2005 to 2014, six of the Gulf Region's key species or species groups showed decreases in catch totals, with the largest decreases occurring among drum (spotted seatrout, -53%); drum (gulf and southern kingfish, -52%); and red drum (-37%). Large increases in the number of fish caught from 2005 to 2014 were observed in striped mullet (113%), Spanish mackerel (75%) and drum (Atlantic croaker, 33%).

Recreational Fishing Facts

Participation

- An average of 3.2 million anglers fished in the Gulf of Mexico Region annually from 2005 to 2014.
- Coastal county residents made up 91 percent of total anglers in this region from 2005 to 2014.

Fishing trips

- In the Gulf of Mexico Region, an average of 23.1 million fishing trips were taken annually from 2005 to 2014.
- Private or rental boat and shore-based fishing trips accounted for an annual average of 13.4 million and 8.9 million fishing trips, respectively, from 2005 to 2014.

Harvest and release

- Spotted seatrout was the most commonly caught key species or species group, averaging 30.4 million fish during the 10-year period. Of these, approximately 59 percent were released rather than harvested.

MARINE ECONOMY

Note that when discussing the marine economy in the Gulf of Mexico Region^{4,5}, all statistics include the entire state of Florida, not just West Florida. Across all economic sectors in Alabama, Louisiana, Mississippi, Texas and Florida approximately 21 million full- and part-time jobs were filled by approximately 1.3 million establishments in 2013. Annual payroll totaled \$929 billion. Total employee compensation in the Gulf of Mexico Region totaled \$1.4 trillion and the combined gross state product of all

⁴ Marine Economy information was not available for West Florida, information for the entire state of Florida is provided here.

⁵ Unless otherwise stated, data was accessed from the U.S. Census Bureau on September 15, 2014 at <http://censtats.census.gov/>

⁶ 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).

states totaled approximately \$2.9 trillion.⁶

The Commercial Fishing Location Quotient (CFLQ) measures the size of this sector in a state's economy relative to the size of the commercial fishing sector in the national economy.⁷ The CFLQ is calculated as the ratio of the percentage of regional employment in the commercial fishing sector compared with the percentage of national employment in the commercial fishing sector. The U.S. CFLQ is 1. If a state CFLQ is less than 1, then less commercial fishing occurs in this state than the national average. If a state CFLQ is greater than 1, then more commercial fishing occurs in this state than the national average.

In 2013, CFLQ for Louisiana was the highest in the region at 1.93. Louisiana's CFLQ suggests that the level of employment in commercial fishing-related industries in this state is approximately 1.93 times higher than the level of employment in these industries nationwide. The 2013 CFLQ in Mississippi was second highest in the region at 1.18.

Seafood Sales and Processing

From 2005 to 2013, the number of non-employer firms (businesses that have no paid employees and are subject to federal income tax) engaged in seafood product preparation and packaging increased 45 percent to 580 firms in 2013, relative to 2005. Most of these non-employer firms were located in Florida (300). Annual receipts for the region increased 54 percent to approximately \$37 million in 2013 (an 18% increase in real terms). During the same period, employer establishments engaged in seafood product preparation and packaging decreased 13 percent to 132 firms. Most employer firms in this sector were located in Louisiana (36). The number of employees decreased 34 percent to 6,637. Annual payroll decreased 4 percent to approximately \$209 million in 2013 (a 26% decrease in real terms).

From 2005 to 2013, employer establishments in the wholesale seafood sales sector decreased 17 percent from 2005 to 2013, to 447. Most wholesaling establishments were located in Florida (234). The number of employees decreased 20 percent to 3,734. Annual payroll

increased 20 percent to approximately \$141 million in 2013 (an 8% decrease in real terms).

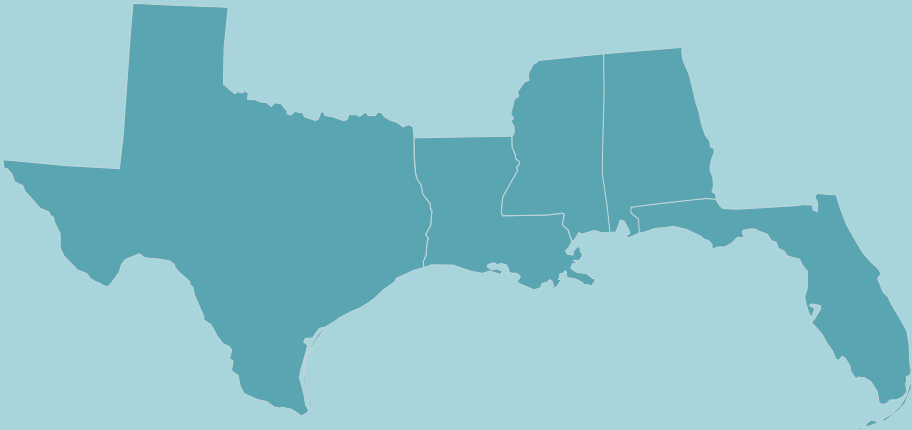
From 2005 to 2013, the number of non-employer firms in the retail seafood sector increased 24 percent to 804 firms. Most of these non-employer firms were located in Florida (338). Annual receipts increased 6 percent to approximately \$67 million in 2013 (a 19% decrease in real terms). During the same period, employer establishments engaged in seafood retail decreased 9 percent to 360 firms. Most employer firms in this sector were located in Florida (165). The number of employees increased 4 percent to 2,102. Annual payroll increased 38 percent to approximately \$45 million in 2013 (a 6% increase in real terms).

Transport, Support and Marine Operations

The size of the Transport, Support and Marine Operations sectors in the Gulf of Mexico Region is difficult to assess because much of the state-level data is suppressed for confidentiality purposes. It is clear, however, that these sectors play an important role in the regional economy. For example, in 2013 679 establishments were classified as marinas, employing 7,070 workers and spending \$204 million on payroll across all five states in the region. Four of the five states had significant activity in the Ship and Boat Building sector, which included 513 establishments, 27,860 workers and \$1.4 billion in payroll across Alabama, Louisiana, Texas and Florida. The Marine Cargo Handling sector had a substantial presence in the same four states and consisted of 167 establishments employing 16,036 workers. This sector contributed \$670 million in payroll, mainly in Texas, Florida and Louisiana. In addition, the Coastal Freight Transportation sector in Louisiana, Texas, Florida and Mississippi accounted for 202 establishments, 8,850 workers and \$766 million in payroll, with the majority of activity in Louisiana and, to a lesser extent, Texas.

⁷ U.S. Bureau of Labor Statistics, "Location Quotient Calculator," http://data.bls.gov/location_quotient/ (accessed September 15, 2014).

Tables | Gulf of Mexico Region



Gulf of Mexico Region | Commercial Fisheries

2014 Economic Impacts of the Gulf of Mexico Seafood Industry (thousands of dollars)

| | Landings Revenue | #Jobs | With Imports | | | #Jobs | Without Imports | | |
|-------------|------------------|--------|--------------|-----------|-------------|--------|-----------------|---------|-------------|
| | | | Sales | Income | Value Added | | Sales | Income | Value Added |
| Alabama | 68,793 | 15,069 | 660,627 | 251,520 | 333,185 | 14,329 | 573,214 | 229,907 | 300,165 |
| Florida | 203,372 | 92,858 | 18,317,052 | 3,434,238 | 6,135,060 | 12,241 | 1,059,989 | 279,380 | 429,336 |
| Louisiana | 451,371 | 44,066 | 2,220,879 | 816,203 | 1,115,858 | 42,901 | 2,042,092 | 778,941 | 1,053,888 |
| Mississippi | 25,995 | 4,714 | 198,608 | 79,501 | 102,731 | 4,704 | 197,129 | 79,189 | 102,217 |
| Texas | 278,353 | 33,880 | 2,857,586 | 826,213 | 1,238,477 | 26,496 | 1,568,259 | 567,146 | 796,557 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| Total Revenue | 625,038 | 691,220 | 690,211 | 663,848 | 636,427 | 624,629 | 811,905 | 745,822 | 943,640 | 1,027,885 |
| Finfish & Other | 122,642 | 135,982 | 145,584 | 146,341 | 142,028 | 117,363 | 184,536 | 184,067 | 205,184 | 184,448 |
| Shellfish | 502,396 | 555,238 | 544,626 | 517,507 | 494,400 | 507,265 | 627,368 | 561,755 | 738,457 | 843,437 |
| Key Species | | | | | | | | | | |
| Blue crab | 37,961 | 43,355 | 46,028 | 39,813 | 45,484 | 41,264 | 48,794 | 47,984 | 61,802 | 73,426 |
| Crawfish | 8,360 | 1,290 | 9,034 | 9,507 | 15,547 | 13,971 | 9,914 | 4,998 | 16,490 | 13,430 |
| Groupers | 24,692 | 22,795 | 20,242 | 22,927 | 17,292 | 13,580 | 19,679 | 23,415 | 23,396 | 28,830 |
| Menhaden | 32,938 | 44,946 | 62,110 | 64,376 | 60,606 | 51,750 | 92,855 | 83,450 | 95,331 | 70,917 |
| Mulletts | 6,593 | 9,429 | 5,543 | 6,099 | 6,105 | 5,221 | 10,368 | 7,557 | 13,222 | 10,292 |
| Oysters | 56,510 | 62,316 | 69,542 | 60,464 | 73,464 | 55,085 | 65,273 | 71,688 | 76,413 | 86,751 |
| Red snapper | 11,336 | 13,167 | 9,570 | 7,972 | 7,984 | 10,202 | 11,413 | 13,565 | 20,621 | 23,088 |
| Shrimp | 360,513 | 397,706 | 367,060 | 366,808 | 327,608 | 339,228 | 441,384 | 390,464 | 510,486 | 587,986 |
| Stone crab | 21,223 | 24,115 | 26,242 | 19,040 | 17,910 | 23,384 | 24,521 | 24,039 | 24,763 | 27,135 |
| Tunas | 9,431 | 8,461 | 10,535 | 6,170 | 8,180 | 2,688 | 5,516 | 10,516 | 7,308 | 6,330 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Total Landings | 1,198,203 | 1,362,326 | 1,404,307 | 1,278,879 | 1,435,665 | 1,072,068 | 1,792,550 | 1,438,492 | 1,395,521 | 1,143,715 |
| Finfish & Other | 887,920 | 974,969 | 1,071,322 | 994,374 | 1,071,708 | 810,649 | 1,472,798 | 1,150,289 | 1,093,569 | 840,674 |
| Shellfish | 310,283 | 387,357 | 332,985 | 284,505 | 363,957 | 261,419 | 319,752 | 288,203 | 301,952 | 303,041 |
| Key Species | | | | | | | | | | |
| Blue crab | 50,041 | 67,481 | 57,964 | 49,258 | 61,277 | 41,240 | 55,606 | 50,409 | 46,940 | 47,765 |
| Crawfish | 15,177 | 1,469 | 15,848 | 15,735 | 19,312 | 14,557 | 9,599 | 4,216 | 19,676 | 11,230 |
| Groupers | 10,776 | 9,092 | 7,308 | 8,560 | 6,633 | 4,870 | 6,987 | 7,973 | 7,280 | 8,547 |
| Menhaden | 815,495 | 901,398 | 1,005,325 | 927,517 | 1,002,579 | 753,442 | 1,398,654 | 1,078,139 | 1,021,526 | 769,943 |
| Mulletts | 9,023 | 12,727 | 8,933 | 10,609 | 11,303 | 8,963 | 14,233 | 10,772 | 13,482 | 13,604 |
| Oysters | 20,174 | 19,674 | 22,518 | 20,723 | 22,829 | 15,824 | 18,742 | 19,948 | 19,249 | 16,525 |
| Red snapper | 4,109 | 4,637 | 2,998 | 2,370 | 2,503 | 3,259 | 3,567 | 3,994 | 5,306 | 5,722 |
| Shrimp | 216,291 | 288,973 | 225,163 | 188,806 | 250,572 | 178,902 | 221,469 | 203,328 | 205,993 | 206,774 |
| Stone crab | 4,534 | 4,806 | 5,893 | 6,169 | 5,407 | 5,112 | 5,482 | 5,226 | 3,778 | 1,890 |
| Tunas | 3,050 | 2,851 | 3,426 | 1,786 | 2,836 | 1,322 | 1,588 | 3,031 | 2,094 | 1,757 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|------|------|------|------|------|------|------|------|------|-------|
| Blue crab | 0.76 | 0.64 | 0.79 | 0.81 | 0.74 | 1.00 | 0.88 | 0.95 | 1.32 | 1.54 |
| Crawfish | 0.55 | 0.88 | 0.57 | 0.60 | 0.81 | 0.96 | 1.03 | 1.19 | 0.84 | 1.20 |
| Groupers | 2.29 | 2.51 | 2.77 | 2.68 | 2.61 | 2.79 | 2.82 | 2.94 | 3.21 | 3.37 |
| Menhaden | 0.04 | 0.05 | 0.06 | 0.07 | 0.06 | 0.07 | 0.07 | 0.08 | 0.09 | 0.09 |
| Mulletts | 0.73 | 0.74 | 0.62 | 0.57 | 0.54 | 0.58 | 0.73 | 0.70 | 0.98 | 0.76 |
| Oysters | 2.80 | 3.17 | 3.09 | 2.92 | 3.22 | 3.48 | 3.48 | 3.59 | 3.97 | 5.25 |
| Red snapper | 2.76 | 2.84 | 3.19 | 3.36 | 3.19 | 3.13 | 3.20 | 3.40 | 3.89 | 4.04 |
| Shrimp | 1.67 | 1.38 | 1.63 | 1.94 | 1.31 | 1.90 | 1.99 | 1.92 | 2.48 | 2.84 |
| Stone crab | 4.68 | 5.02 | 4.45 | 3.09 | 3.31 | 4.57 | 4.47 | 4.60 | 6.55 | 14.35 |
| Tunas | 3.09 | 2.97 | 3.07 | 3.45 | 2.88 | 2.03 | 3.47 | 3.47 | 3.49 | 3.60 |

2014 Economic Impacts of the Gulf of Mexico Recreational Fishing Expenditures (thousands of dollars, trips)

| | Trips | #Jobs | Sales | Income | Value Added |
|--------------|-----------------|--------|-----------|-----------|-------------|
| Alabama | 2,169 | 14,124 | 1,070,579 | 540,257 | 827,849 |
| West Florida | 15,179 | 70,109 | 7,467,774 | 3,161,122 | 4,868,743 |
| Louisiana | 2,188 | 15,241 | 1,619,677 | 662,470 | 1,029,281 |
| Mississippi | 1,480 | 4,174 | 374,063 | 157,772 | 247,281 |
| Texas | NA ¹ | 16,496 | 1,825,290 | 757,027 | 1,205,146 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 2,160,705 |
| For-Hire | 287,092 | 104,377 | Other Equipment | 941,315 |
| Private Boat | 144,610 | 501,020 | Boat Expenses | 5,753,157 |
| Shore | 213,957 | 281,503 | Vehicle Expenses | 1,020,298 |
| Total | 645,660 | 886,899 | Second Home Expenses | 137,662 |
| | | | Total Durable Expenditures | 10,013,137 |
| Total State Trip and Durable Goods Expenditures | | | | 11,545,696 |

Recreational Anglers by Residential Area (thousands of anglers)^{1,2}

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 3,133 | 3,328 | 3,236 | 2,926 | 2,550 | 2,479 | 2,737 | 2,802 | 2,972 | 2,616 |
| Non-Coastal | 190 | 315 | 327 | 262 | 295 | 236 | 311 | 268 | 400 | 273 |
| Out-of-State ³ | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Total Anglers | 3,323 | 3,643 | 3,563 | 3,188 | 2,845 | 2,715 | 3,048 | 3,070 | 3,372 | 2,889 |

Recreational Fishing Effort by Mode (thousands of angler trips)

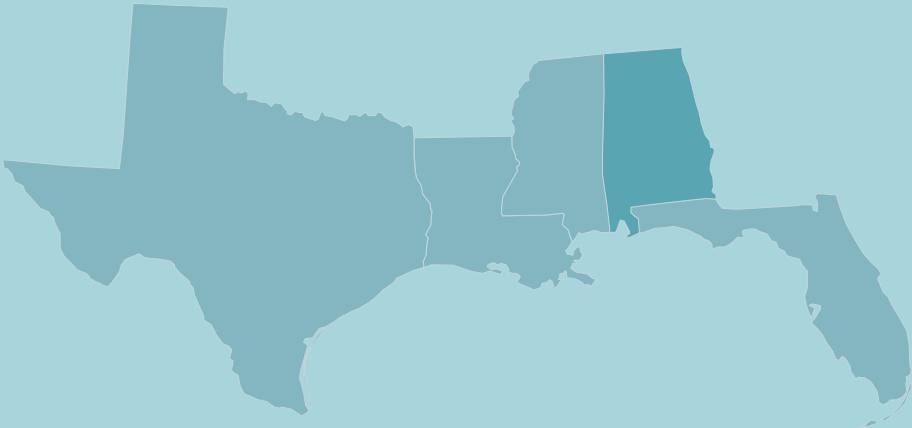
| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| For-Hire | 692 | 837 | 852 | 819 | 823 | 581 | 735 | 884 | 907 | 927 |
| Private | 13,586 | 13,620 | 14,980 | 15,195 | 13,443 | 12,684 | 12,911 | 12,782 | 13,510 | 11,508 |
| Shore | 9,014 | 8,837 | 8,458 | 8,776 | 8,333 | 7,783 | 8,930 | 9,506 | 10,817 | 8,581 |
| Total Trips | 23,292 | 23,294 | 24,290 | 24,790 | 22,599 | 21,048 | 22,576 | 23,172 | 25,234 | 21,016 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)⁴

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------------------------|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|
| Drum (Atlantic croaker) | H | 867 | 1541 | 1408 | 1935 | 1290 | 1635 | 2209 | 1462 | 1883 | 2682 |
| | R | 2,844 | 2,314 | 2,616 | 3,149 | 3,858 | 3,827 | 5,899 | 3,922 | 3,268 | 2,240 |
| Drum (Gulf and southern kingfish) | H | 1,426 | 1,250 | 1,137 | 1,307 | 1,066 | 1,420 | 941 | 918 | 1,623 | 705 |
| | R | 781 | 926 | 843 | 729 | 576 | 625 | 539 | 535 | 474 | 356 |
| Drum (sand and silver seatrouts) | H | 2,159 | 2,239 | 3,185 | 3,556 | 4,314 | 4,700 | 5,962 | 5,055 | 3,013 | 2,500 |
| | R | 724 | 1,538 | 1,910 | 1,989 | 2,444 | 1,807 | 2,541 | 2,474 | 1,851 | 481 |
| Drum (spotted seatrout) | H | 10,882 | 14,272 | 12,103 | 15,042 | 14,146 | 10,870 | 14,719 | 13,593 | 12,761 | 5,703 |
| | R | 20,214 | 20,055 | 18,849 | 21,017 | 17,365 | 14,564 | 19,120 | 20,217 | 19,528 | 8,931 |
| Porgies (sheepshead) | H | 2,081 | 1,185 | 1,245 | 1,613 | 1,607 | 1,195 | 2,274 | 1,596 | 1,355 | 1,381 |
| | R | 2,394 | 1,507 | 1,223 | 1,486 | 1,338 | 1,739 | 1,634 | 1,516 | 1,672 | 1,579 |
| Red drum | H | 2,548 | 2,681 | 3,136 | 3,560 | 2,893 | 3,516 | 3,889 | 3,012 | 4,138 | 2,096 |
| | R | 6,233 | 6,392 | 6,222 | 7,016 | 5,525 | 6,468 | 6,448 | 6,330 | 7,699 | 3,479 |
| Red snapper | H | 884 | 1035 | 1270 | 720 | 828 | 368 | 557 | 626 | 1291 | 500 |
| | R | 2,194 | 2,831 | 3,259 | 2,112 | 2,145 | 1,436 | 1,521 | 1,424 | 2,824 | 1,785 |
| Southern flounder | H | 623 | 538 | 701 | 538 | 691 | 801 | 857 | 836 | 1103 | 491 |
| | R | 195 | 171 | 239 | 121 | 193 | 220 | 222 | 309 | 339 | 72 |
| Spanish mackerel | H | 1,192 | 1,759 | 1,330 | 1,895 | 1,504 | 1,564 | 1,534 | 1,834 | 3,352 | 1,718 |
| | R | 1,374 | 2,855 | 2,104 | 2,040 | 1,634 | 2,477 | 1,941 | 1,441 | 4,158 | 2,779 |
| Striped mullet | H | 1,081 | 1,103 | 1,150 | 1,258 | 743 | 1,666 | 1,900 | 2,356 | 2,984 | 2,365 |
| | R | 165 | 141 | 158 | 146 | 226 | 127 | 313 | 204 | 194 | 293 |

¹ NA = The Marine Recreational Program (MRIP) does not collect effort data for Texas.² Includes Louisiana resident participation estimated from historical MRIP data and a state creel survey.³ Data are not available because out-of-state resident information is collected for individual states but whether an angler is a resident of a region is not specified.⁴ Data on the number of fish released in Texas are not collected by the Texas Parks and Wildlife Department (TPWD) and therefore not reported in this table.

Tables | Alabama



Alabama | Commercial Fisheries

2014 Economic Impacts of the Alabama Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|---------|---------|-------------|-----------------|---------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 15,069 | 660,627 | 251,520 | 333,185 | 14,329 | 573,214 | 229,907 | 300,165 |
| Commercial Harvesters | 2,363 | 113,695 | 33,648 | 50,164 | 2,363 | 113,695 | 33,648 | 50,164 |
| Seafood Processors & Dealers | 2,802 | 176,209 | 69,022 | 87,712 | 2,312 | 145,443 | 56,971 | 72,397 |
| Importers | 199 | 54,840 | 8,789 | 16,718 | - | - | - | - |
| Seafood Wholesalers & Distributors | 219 | 10,250 | 3,593 | 4,628 | 211 | 9,889 | 3,467 | 4,466 |
| Retail | 9,486 | 305,632 | 136,468 | 173,963 | 9,442 | 304,187 | 135,821 | 173,138 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 39,726 | 48,558 | 48,845 | 44,503 | 39,624 | 26,335 | 50,910 | 46,495 | 55,532 | 68,793 |
| Finfish & Other | 3,982 | 4,572 | 3,686 | 4,358 | 3,662 | 2,748 | 4,072 | 5,183 | 4,680 | 4,572 |
| Shellfish | 35,744 | 43,986 | 45,160 | 40,145 | 35,962 | 23,587 | 46,838 | 41,312 | 50,853 | 64,221 |
| Key Species | | | | | | | | | | |
| Blue crab | 663 | 1,319 | 1,711 | 1,533 | 961 | 732 | 1,128 | 1,044 | 1,036 | 1,319 |
| Flounders | 247 | 223 | 261 | 214 | 197 | 97 | 222 | 185 | 58 | 53 |
| Menhaden | 63 | 48 | 71 | 59 | 42 | 15 | 58 | 84 | 104 | 147 |
| Mulletts | 1,117 | 1,171 | 984 | 1,030 | 765 | 594 | 687 | 1,206 | 1,178 | 1,046 |
| Oysters | 3,020 | 3,639 | 2,698 | 243 | 77 | 390 | 1,322 | 1,253 | 786 | 441 |
| Red snapper | 638 | 536 | 213 | 239 | 263 | 329 | 314 | 316 | 401 | 697 |
| Sharks | 478 | 463 | 250 | 403 | 275 | 111 | 381 | 330 | 247 | 219 |
| Shrimp | 32,002 | 39,022 | 40,742 | 38,355 | 34,894 | 22,463 | 44,361 | 39,009 | 49,021 | 62,445 |
| Spanish mackerel | 401 | 573 | 453 | 664 | 301 | 499 | 582 | 1,149 | 940 | 472 |
| Vermillion snapper | 149 | 318 | 323 | 507 | 841 | 384 | 622 | 393 | 88 | 387 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Landings | 23,985 | 34,033 | 29,434 | 24,612 | 29,199 | 14,063 | 26,119 | 26,322 | 23,085 | 25,268 |
| Finfish & Other | 5,552 | 6,498 | 4,857 | 5,577 | 4,478 | 3,441 | 4,966 | 6,596 | 5,831 | 5,276 |
| Shellfish | 18,432 | 27,535 | 24,578 | 19,035 | 24,721 | 10,622 | 21,153 | 19,726 | 17,254 | 19,992 |
| Key Species | | | | | | | | | | |
| Blue crab | 1,024 | 2,384 | 2,557 | 1,799 | 1,458 | 927 | 1,617 | 1,325 | 1,025 | 1,184 |
| Flounders | 130 | 118 | 133 | 107 | 97 | 48 | 111 | 83 | 25 | 23 |
| Menhaden | 521 | 350 | 470 | 268 | 190 | 81 | 364 | 521 | 496 | 700 |
| Mulletts | 1,976 | 1,913 | 1,798 | 2,017 | 1,814 | 1,202 | 1,262 | 1,946 | 1,793 | 1,829 |
| Oysters | 1,041 | 940 | 769 | 71 | 23 | 68 | 296 | 265 | 133 | 58 |
| Red snapper | 214 | 177 | 59 | 61 | 65 | 83 | 78 | 78 | 108 | 180 |
| Sharks | 800 | 1,227 | 315 | 424 | 328 | 140 | 450 | 495 | 343 | 272 |
| Shrimp | 16,260 | 24,201 | 21,247 | 17,154 | 23,215 | 9,625 | 19,224 | 18,124 | 16,082 | 18,735 |
| Spanish mackerel | 568 | 873 | 580 | 921 | 418 | 733 | 839 | 1,377 | 972 | 431 |
| Vermillion snapper | 66 | 122 | 129 | 199 | 346 | 148 | 224 | 133 | 28 | 124 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|------|------|------|------|------|------|------|------|------|------|
| Blue crab | 0.65 | 0.55 | 0.67 | 0.85 | 0.66 | 0.79 | 0.70 | 0.79 | 1.01 | 1.11 |
| Flounders | 1.91 | 1.89 | 1.97 | 2.01 | 2.04 | 2.05 | 2.00 | 2.21 | 2.35 | 2.24 |
| Menhaden | 0.12 | 0.14 | 0.15 | 0.22 | 0.22 | 0.18 | 0.16 | 0.16 | 0.21 | 0.21 |
| Mulletts | 0.57 | 0.61 | 0.55 | 0.51 | 0.42 | 0.49 | 0.54 | 0.62 | 0.66 | 0.57 |
| Oysters | 2.90 | 3.87 | 3.51 | 3.41 | 3.33 | 5.75 | 4.47 | 4.72 | 5.90 | 7.62 |
| Red snapper | 2.98 | 3.03 | 3.62 | 3.93 | 4.04 | 3.97 | 4.04 | 4.05 | 3.70 | 3.86 |
| Sharks | 0.60 | 0.38 | 0.79 | 0.95 | 0.84 | 0.79 | 0.85 | 0.67 | 0.72 | 0.81 |
| Shrimp | 1.97 | 1.61 | 1.92 | 2.24 | 1.50 | 2.33 | 2.31 | 2.15 | 3.05 | 3.33 |
| Spanish mackerel | 0.71 | 0.66 | 0.78 | 0.72 | 0.72 | 0.68 | 0.69 | 0.83 | 0.97 | 1.09 |
| Vermillion snapper | 2.26 | 2.61 | 2.50 | 2.55 | 2.43 | 2.59 | 2.78 | 2.97 | 3.12 | 3.11 |

2014 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 570 | 49,799 | 19,498 | 26,942 |
| | Private Boat | 398 | 34,902 | 12,167 | 20,128 |
| | Shore | 1,046 | 88,048 | 30,424 | 49,852 |
| Total Durable Expenditures | | 12,110 | 897,830 | 478,168 | 730,927 |
| Total State Economic Impacts | | 14,124 | 1,070,579 | 540,257 | 827,849 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 272,096 |
| For-Hire | 26,481 | 6,455 | Other Equipment | 86,600 |
| Private Boat | 7,904 | 26,859 | Boat Expenses | 864,053 |
| Shore | 40,222 | 33,090 | Vehicle Expenses | 36,281 |
| Total | 74,607 | 66,404 | Second Home Expenses | 24,247 |
| | | | Total Durable Expenditures | 1,283,277 |
| Total State Trip and Durable Goods Expenditures | | | | 1,424,288 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|-------|------|
| Coastal | 231 | 233 | 253 | 192 | 205 | 195 | 295 | 254 | 279 | 220 |
| Non-Coastal | 93 | 184 | 169 | 116 | 151 | 140 | 177 | 131 | 224 | 123 |
| Out-of-State | 161 | 320 | 291 | 237 | 209 | 220 | 435 | 339 | 549 | 510 |
| Total Anglers | 485 | 737 | 713 | 545 | 565 | 555 | 907 | 724 | 1,052 | 853 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 56 | 78 | 75 | 56 | 56 | 34 | 75 | 59 | 90 | 87 |
| Private | 828 | 811 | 985 | 946 | 885 | 840 | 1,206 | 1,035 | 1,006 | 714 |
| Shore | 721 | 1,050 | 901 | 702 | 772 | 812 | 1,202 | 1,211 | 1,767 | 1,368 |
| Total Trips | 1,605 | 1,939 | 1,961 | 1,704 | 1,713 | 1,686 | 2,483 | 2,305 | 2,863 | 2,169 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------------|---|-------|------|------|-------|-------|-------|-------|-------|-------|-------|
| Bluefish | H | 15 | 13 | 26 | 16 | 14 | 30 | 74 | 55 | 163 | 37 |
| | R | 77 | 150 | 175 | 54 | 46 | 80 | 166 | 197 | 639 | 518 |
| Drum (Atlantic croaker) | H | 233 | 452 | 463 | 1,163 | 250 | 918 | 886 | 345 | 391 | 1,106 |
| | R | 1,593 | 824 | 924 | 1,370 | 1,822 | 1,861 | 2,593 | 1,206 | 886 | 1,393 |
| Drum (kingfishes) ¹ | H | 263 | 444 | 477 | 668 | 593 | 633 | 626 | 226 | 929 | 321 |
| | R | 266 | 460 | 291 | 257 | 284 | 310 | 342 | 97 | 260 | 156 |
| Drum (sand seatrout) | H | 349 | 593 | 704 | 1,216 | 1,428 | 2,069 | 2,346 | 1,415 | 485 | 524 |
| | R | 289 | 502 | 481 | 409 | 753 | 835 | 743 | 479 | 294 | 246 |
| Drum (spotted seatrout) | H | 295 | 327 | 358 | 269 | 318 | 610 | 825 | 773 | 539 | 242 |
| | R | 323 | 598 | 487 | 844 | 758 | 454 | 1,302 | 1,126 | 761 | 253 |
| Porgies (sheepshead) | H | 279 | 123 | 321 | 289 | 165 | 218 | 480 | 313 | 285 | 121 |
| | R | 86 | 80 | 30 | 158 | 48 | 51 | 146 | 48 | 46 | 17 |
| Red drum | H | 154 | 100 | 84 | 88 | 62 | 123 | 143 | 124 | 188 | 90 |
| | R | 184 | 144 | 136 | 227 | 111 | 152 | 150 | 306 | 425 | 317 |
| Red snapper | H | 232 | 181 | 217 | 107 | 138 | 42 | 217 | 152 | 451 | 133 |
| | R | 494 | 639 | 852 | 340 | 394 | 287 | 488 | 193 | 857 | 757 |
| Southern flounder | H | 151 | 123 | 96 | 93 | 139 | 243 | 163 | 155 | 84 | 29 |
| | R | 83 | 65 | 38 | 37 | 22 | 65 | 60 | 53 | 43 | 18 |
| Spanish mackerel | H | 45 | 58 | 91 | 111 | 76 | 254 | 335 | 515 | 1,313 | 128 |
| | R | 52 | 49 | 21 | 32 | 59 | 102 | 128 | 148 | 1,130 | 53 |

¹ Kingfishes include southern kingfish and Gulf kingfish.

Alabama | Marine Economy

Alabama's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|---------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 101,976 (1.4%) | 1,667,526 (1.4%) | 53.37 (1.2%) | 86.75 (1.2%) | 157.91 (1.2%) | 0.29 |
| 2013 | 97,578 (1.3%) | 1,603,100 (1.4%) | 62.41 (1.1%) | 102.80 (1.2%) | 194.67 (1.2%) | 0.57 |
| %Change | -4.5 | -4.0 | 14.5 | 15.6 | 18.9 | -96.6 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product | Firms | 40 | 34 | 47 | 33 | 41 | 68 | 67 | 47 | 58 |
| prep. & packaging | Receipts | 3,414 | 1,558 | 1,547 | 1,894 | 1,809 | 3,314 | 4,354 | 1,965 | 3,069 |
| Seafood sales, retail | Firms | 44 | 57 | 61 | 57 | 67 | 71 | 58 | 68 | 66 |
| | Receipts | 3,855 | 4,802 | 4,279 | 5,632 | 5,484 | 5,197 | 4,759 | 7,073 | 5,520 |

Seafood Sales & Processing - Employer Establishments (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product | Establishments | 26 | 24 | 23 | 23 | 22 | 21 | 16 | 17 | 22 |
| prep. & packaging | Employees | 1,925 | 1,629 | 1,510 | 1,450 | 1,086 | 1,128 | 882 | 778 | 989 |
| | Payroll | 38,229 | 34,703 | 32,774 | 29,277 | 24,900 | 22,824 | 21,922 | 19,730 | 22,641 |
| Seafood sales, wholesale | Establishments | 26 | 26 | 31 | 29 | 28 | 23 | 25 | 16 | 18 |
| | Employees | 607 | 395 | 395 | 494 | 339 | 332 | 321 | 306 | 281 |
| | Payroll | 6,345 | 6,195 | 6,202 | 8,751 | 5,893 | 5,119 | 6,547 | 6,221 | 6,861 |
| Seafood sales, retail | Establishments | 34 | 28 | 33 | 33 | 31 | 34 | 32 | 32 | 28 |
| | Employees | 95 | 0 | 0 | 0 | 130 | 132 | 120 | 189 | 219 |
| | Payroll | 1,399 | 0 | 1,809 | 1,710 | 2,044 | 2,016 | 1,888 | 2,990 | 3,267 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

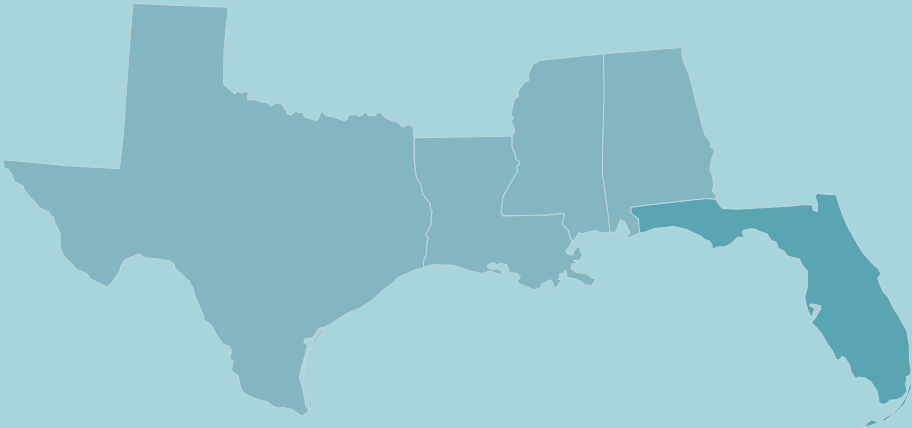
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|--------|---------|---------|---------|---------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 10 | 6 | 8 | 4 | 4 | 5 | 5 | 4 | 5 |
| | Employees | ds | 15 | 48 | ds | ds | ds | 215 | ds | ds |
| | Payroll | ds | 754 | 3,266 | ds | ds | ds | 13,117 | ds | ds |
| Deep sea freight transportation | Establishments | 3 | 3 | 5 | 7 | 7 | 5 | 6 | 5 | 5 |
| | Employees | ds | ds | 46 | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | 3,553 | ds | ds | ds | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 1 | 1 | 1 | 2 | 3 | 2 | 2 | 1 | 0 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | NA |
| Marinas | Establishments | 58 | 52 | 52 | 56 | 55 | 54 | 53 | 57 | 54 |
| | Employees | 347 | 312 | 364 | 316 | 278 | 609 | ds | 329 | 332 |
| | Payroll | 8,047 | 8,388 | 9,382 | 9,170 | 8,418 | 12,149 | 12,196 | 10,253 | 9,659 |
| Marine cargo handling | Establishments | 17 | 14 | 19 | 20 | 19 | 19 | 19 | 10 | 13 |
| | Employees | 672 | ds | 491 | 756 | 658 | 548 | 536 | ds | 554 |
| | Payroll | 28,458 | ds | 21,076 | 33,244 | 27,272 | 32,143 | 34,998 | ds | 34,481 |
| Navigational services to shipping | Establishments | 17 | 18 | 16 | 17 | 16 | 16 | 16 | 14 | 12 |
| | Employees | ds | ds | 338 | 287 | 294 | 276 | 283 | 241 | 208 |
| | Payroll | ds | ds | 17,554 | 16,712 | 15,383 | 14,737 | 14,981 | 8,808 | 14,761 |
| Port & harbor operations | Establishments | 3 | 3 | 2 | 4 | 5 | 5 | 3 | 6 | 3 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | 101 | 4 |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | 5,788 | 160 |
| Ship & boat building | Establishments | 45 | 47 | 42 | 42 | 40 | 32 | 35 | 37 | 38 |
| | Employees | 2,591 | 3,027 | 3,570 | 4,435 | 3,913 | 2,598 | 3,176 | 4,936 | 5,948 |
| | Payroll | 86,453 | 121,185 | 172,380 | 188,543 | 159,065 | 151,813 | 166,116 | 251,063 | 303,016 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not available.

Tables | West Florida



West Florida | Commercial Fisheries

2014 Economic Impacts of the Florida¹ Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|------------|-----------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 92,858 | 18,317,052 | 3,434,238 | 6,135,060 | 12,241 | 1,059,989 | 279,380 | 429,336 |
| Commercial Harvesters | 7,921 | 510,330 | 160,460 | 213,356 | 7,921 | 510,330 | 160,460 | 213,356 |
| Seafood Processors & Dealers | 5,381 | 863,388 | 167,091 | 328,486 | 640 | 110,089 | 21,306 | 41,885 |
| Importers | 48,133 | 13,240,472 | 2,122,038 | 4,036,275 | - | - | - | - |
| Seafood Wholesalers & Distributors | 11,710 | 1,333,732 | 523,618 | 651,451 | 533 | 60,718 | 23,837 | 29,657 |
| Retail | 19,712 | 2,369,130 | 461,031 | 905,493 | 3,146 | 378,853 | 73,777 | 144,438 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)²

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 137,912 | 145,494 | 132,162 | 123,850 | 117,324 | 139,046 | 166,015 | 143,188 | 181,507 | 203,372 |
| Finfish & Other | 50,600 | 50,358 | 45,890 | 50,926 | 49,582 | 40,865 | 59,410 | 60,406 | 67,612 | 69,919 |
| Shellfish | 87,312 | 95,136 | 86,272 | 72,924 | 67,743 | 98,181 | 106,605 | 82,783 | 113,895 | 133,452 |
| Key Species | | | | | | | | | | |
| Blue crab | 7,035 | 7,043 | 5,769 | 3,289 | 4,195 | 6,706 | 7,719 | 5,142 | 6,454 | 6,977 |
| Gag | 7,084 | 4,151 | 4,348 | 4,913 | 2,759 | 2,079 | 1,439 | 2,437 | 2,799 | 2,852 |
| Lobsters | 15,077 | 24,885 | 24,546 | 19,175 | 12,206 | 32,752 | 35,616 | 21,136 | 46,749 | 50,537 |
| Mulletts | 4,355 | 6,021 | 3,663 | 4,172 | 5,069 | 4,188 | 8,630 | 5,050 | 11,081 | 8,072 |
| Oyster | 2,854 | 5,415 | 6,631 | 5,519 | 6,968 | 6,298 | 8,582 | 9,706 | 5,783 | 4,038 |
| Quahog clam | 1,736 | 807 | 914 | 1,825 | 1,524 | 1,002 | 921 | 753 | 921 | NA |
| Red grouper | 13,376 | 14,384 | 11,024 | 13,591 | 10,488 | 8,992 | 15,087 | 16,737 | 16,219 | 20,944 |
| Red snapper | 1,671 | 1,991 | 3,066 | 2,951 | 2,980 | 4,552 | 5,417 | 6,141 | 8,073 | 8,067 |
| Shrimp | 38,625 | 32,225 | 20,976 | 23,265 | 24,446 | 27,554 | 28,456 | 21,463 | 28,498 | 40,714 |
| Stone crab | 21,074 | 24,029 | 26,213 | 19,019 | 17,806 | 23,335 | 24,430 | 23,934 | 24,710 | 27,132 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)²

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Landings | 73,038 | 70,766 | 59,784 | 60,380 | 66,387 | 63,678 | 78,459 | 63,347 | 62,960 | 76,126 |
| Finfish & Other | 36,543 | 35,887 | 30,645 | 35,302 | 38,792 | 32,023 | 42,288 | 37,993 | 37,759 | 39,076 |
| Shellfish | 36,496 | 34,879 | 29,139 | 25,078 | 27,595 | 31,656 | 36,171 | 25,355 | 25,200 | 37,050 |
| Key Species | | | | | | | | | | |
| Blue crab | 7,370 | 8,610 | 6,110 | 2,660 | 3,371 | 5,759 | 6,833 | 4,157 | 4,463 | 4,187 |
| Gag | 2,688 | 1,436 | 1,339 | 1,478 | 825 | 572 | 369 | 612 | 676 | 681 |
| Lobsters | 3,059 | 4,372 | 3,405 | 2,981 | 3,961 | 5,287 | 5,303 | 3,635 | 5,601 | 4,795 |
| Mulletts | 5,635 | 7,308 | 5,619 | 6,980 | 9,167 | 7,262 | 11,410 | 7,249 | 10,879 | 10,495 |
| Oyster | 1,417 | 2,394 | 2,959 | 2,526 | 2,877 | 2,165 | 3,100 | 3,316 | 1,298 | 731 |
| Quahog clam | 212 | 96 | 116 | 279 | 255 | 156 | 137 | 128 | 183 | NA |
| Red grouper | 6,386 | 6,062 | 4,352 | 5,628 | 4,387 | 3,488 | 5,635 | 6,141 | 5,412 | 6,545 |
| Red snapper | 584 | 649 | 919 | 849 | 863 | 1,317 | 1,538 | 1,698 | 2,181 | 2,094 |
| Shrimp | 19,297 | 14,176 | 8,628 | 9,942 | 11,451 | 12,892 | 11,975 | 7,658 | 9,405 | 11,448 |
| Stone crab | 4,502 | 4,784 | 5,884 | 6,163 | 5,382 | 5,100 | 5,460 | 5,202 | 3,767 | 1,889 |

Average Annual Price of Key Species/Species Groups (dollars per pound)²

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|------|------|------|------|------|------|------|------|------|-------|
| Blue crab | 0.95 | 0.82 | 0.94 | 1.24 | 1.24 | 1.16 | 1.13 | 1.24 | 1.45 | 1.67 |
| Gag | 2.64 | 2.89 | 3.25 | 3.32 | 3.34 | 3.63 | 3.90 | 3.98 | 4.14 | 4.19 |
| Lobsters | 4.93 | 5.69 | 7.21 | 6.43 | 3.08 | 6.19 | 6.72 | 5.81 | 8.35 | 10.54 |
| Mulletts | 0.77 | 0.82 | 0.65 | 0.60 | 0.55 | 0.58 | 0.76 | 0.70 | 1.02 | 0.77 |
| Oyster | 2.02 | 2.26 | 2.24 | 2.19 | 2.42 | 2.91 | 2.77 | 2.93 | 4.46 | 5.52 |
| Quahog clam | 8.17 | 8.44 | 7.90 | 6.53 | 5.97 | 6.43 | 6.74 | 5.86 | 5.03 | NA |
| Red grouper | 2.09 | 2.37 | 2.53 | 2.41 | 2.39 | 2.58 | 2.68 | 2.73 | 3.00 | 3.20 |
| Red snapper | 2.86 | 3.07 | 3.34 | 3.47 | 3.45 | 3.46 | 3.52 | 3.62 | 3.70 | 3.85 |
| Shrimp | 2.00 | 2.27 | 2.43 | 2.34 | 2.13 | 2.14 | 2.38 | 2.80 | 3.03 | 3.56 |
| Stone crab | 4.68 | 5.02 | 4.45 | 3.09 | 3.31 | 4.58 | 4.47 | 4.60 | 6.56 | 14.36 |

¹ Information reported in this table is for the entire state of Florida, not just West Florida.² NA = These data are confidential and therefore not disclosable.

2014 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|-----------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 4,409 | 471,415 | 199,485 | 286,678 |
| | Private Boat | 3,878 | 406,135 | 155,527 | 257,061 |
| | Shore | 2,903 | 286,396 | 108,612 | 178,817 |
| Total Durable Expenditures | | 58,919 | 6,303,828 | 2,697,498 | 4,146,187 |
| Total State Economic Impacts | | 70,109 | 7,467,774 | 3,161,122 | 4,868,743 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 227,247 | 31,488 | Fishing Tackle | 1,317,124 |
| Private Boat | 121,376 | 218,202 | Other Equipment | 548,979 |
| Shore | 152,225 | 54,261 | Boat Expenses | 3,138,979 |
| Total | 500,848 | 303,951 | Vehicle Expenses | 318,188 |
| | | | Second Home Expenses | 57,872 |
| | | | Total Durable Expenditures | 5,381,143 |
| Total State Trip and Durable Goods Expenditures | | | | 6,185,942 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Coastal | 2,088 | 2,084 | 1,934 | 1,820 | 1,551 | 1,538 | 1,592 | 1,718 | 1,813 | 1,649 |
| Non-Coastal ¹ | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Out-of-State | 2,008 | 1,988 | 2,151 | 2,029 | 1,671 | 1,470 | 1,624 | 2,141 | 2,538 | 2,716 |
| Total Anglers | 4,096 | 4,072 | 4,085 | 3,849 | 3,222 | 3,008 | 3,216 | 3,859 | 4,351 | 4,365 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| For-Hire | 505 | 565 | 612 | 571 | 573 | 461 | 536 | 699 | 684 | 694 |
| Private | 9,491 | 9,382 | 10,005 | 10,145 | 8,623 | 8,160 | 7,520 | 7,865 | 8,328 | 8,115 |
| Shore | 6,699 | 6,721 | 6,319 | 6,782 | 6,482 | 5,645 | 5,845 | 6,216 | 6,937 | 6,370 |
| Total Trips | 16,695 | 16,668 | 16,936 | 17,498 | 15,678 | 14,266 | 13,901 | 14,780 | 15,949 | 15,179 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------------------------|---|--------|-------|--------|-------|-------|-------|--------|--------|-------|-------|
| Common snook | H | 62 | 25 | 35 | 25 | 14 | 0 | 1 | 0 | 33 | 13 |
| | R | 2,281 | 1,391 | 1,591 | 1,596 | 1,925 | 600 | 747 | 1,040 | 1,547 | 1,578 |
| Drum (sand and silver seatrouts) | H | 487 | 434 | 1,119 | 746 | 892 | 409 | 865 | 1,415 | 705 | 578 |
| | R | 64 | 409 | 599 | 583 | 459 | 211 | 295 | 742 | 240 | 122 |
| Drum (spotted seatrout) | H | 1,980 | 1,616 | 1,514 | 1,543 | 1,370 | 1,115 | 1,475 | 1,626 | 1,406 | 1,340 |
| | R | 11,749 | 9,456 | 10,059 | 9,584 | 7,672 | 8,470 | 11,382 | 10,921 | 7,760 | 7,935 |
| Gag | H | 491 | 356 | 286 | 434 | 203 | 232 | 98 | 132 | 213 | 105 |
| | R | 2,314 | 1,875 | 2,676 | 4,076 | 2,724 | 2,017 | 1,158 | 980 | 1,170 | 817 |
| Gray snapper | H | 932 | 663 | 1,046 | 1,394 | 1,176 | 560 | 419 | 949 | 1,482 | 1,933 |
| | R | 4,700 | 2,848 | 4,289 | 5,690 | 3,014 | 1,858 | 2,239 | 3,125 | 5,136 | 7,519 |
| King mackerel | H | 178 | 343 | 271 | 184 | 453 | 172 | 128 | 180 | 205 | 306 |
| | R | 133 | 392 | 84 | 155 | 138 | 81 | 46 | 62 | 88 | 118 |
| Mullet ³ | H | 988 | 1,297 | 613 | 1,237 | 656 | 967 | 855 | 1,550 | 1,640 | 1,480 |
| | R | 208 | 100 | 183 | 143 | 191 | 73 | 106 | 88 | 224 | 319 |
| Porgies (sheepshead) | H | 1,050 | 623 | 591 | 556 | 682 | 455 | 608 | 628 | 524 | 895 |
| | R | 1,856 | 942 | 894 | 855 | 808 | 1,245 | 1,276 | 1,177 | 1,084 | 1,535 |
| Red drum | H | 501 | 377 | 412 | 457 | 225 | 240 | 286 | 414 | 364 | 388 |
| | R | 3,254 | 2,828 | 2,558 | 2,562 | 1,440 | 1,992 | 2,894 | 2,300 | 2,196 | 2,647 |
| Spanish mackerel | H | 1,100 | 1,672 | 1,205 | 1,753 | 1,392 | 1,284 | 1,154 | 1,215 | 1,970 | 1,565 |
| | R | 1,279 | 2,767 | 2,064 | 1,988 | 1,545 | 2,360 | 1,780 | 1,219 | 3,017 | 2,724 |

¹ Data is not available because all West Florida residents are considered coastal county residents.² In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.³ Mullet³ encompass species within the mullet genus, including striped mullets.

West Florida | Marine Economy

West Florida's State Economy (% of national total)¹

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ² |
|----------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 504,662 (6.7%) | 7,107,378 (6.1%) | 239.20 (5.3%) | 382.54 (5.4%) | 700.22 (5.4%) | 1.00 |
| 2013 | 510,389 (6.8%) | 7,134,644 (6%) | 294.14 (5.2%) | 440.33 (5%) | 800.70 (4.8%) | 1.04 |
| % Change | 1.1 | 0.4 | 18.7 | 13.1 | 12.5 | 4.0 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product | Firms | 164 | 174 | 173 | 202 | 217 | 280 | 294 | 307 | 300 |
| prep. & packaging | Receipts | 8,756 | 10,184 | 10,497 | 11,065 | 12,473 | 14,635 | 14,618 | 17,557 | 17,214 |
| Seafood sales, retail | Firms | 247 | 251 | 319 | 331 | 316 | 361 | 362 | 383 | 338 |
| | Receipts | 22,787 | 20,708 | 27,557 | 26,087 | 25,667 | 27,964 | 29,037 | 30,765 | 25,332 |

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

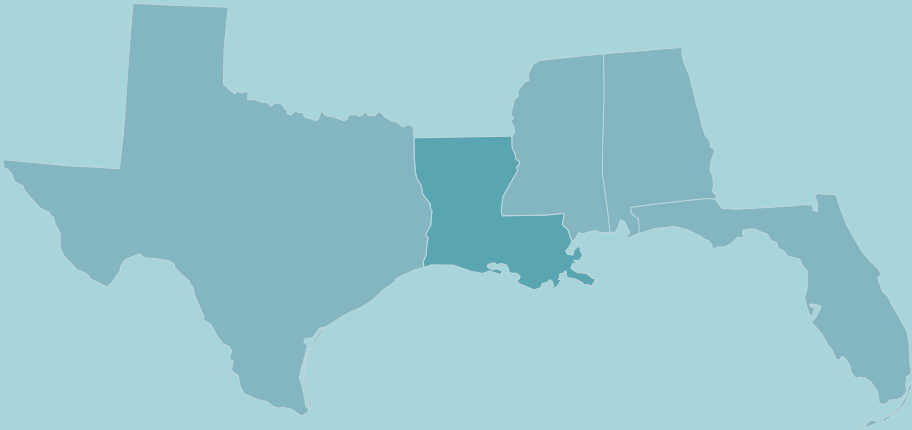
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product | Establishments | 25 | 22 | 20 | 23 | 25 | 27 | 24 | 27 | 25 |
| prep. & packaging | Employees | 1,616 | 1,704 | 1,748 | 1,637 | 1,143 | 1,269 | 1,095 | 1,608 | 1,374 |
| | Payroll | 47,529 | 62,801 | 58,233 | 53,455 | 46,235 | 45,772 | 42,612 | 51,735 | 50,003 |
| Seafood sales, wholesale | Establishments | 258 | 259 | 267 | 229 | 215 | 229 | 250 | 226 | 234 |
| | Employees | 1,883 | 2,091 | 2,308 | 1,913 | 1,762 | 1,747 | 1,913 | 1,957 | 1,878 |
| | Payroll | 65,339 | 73,897 | 85,019 | 75,203 | 72,159 | 70,889 | 77,115 | 75,945 | 79,266 |
| Seafood sales, retail | Establishments | 176 | 173 | 169 | 168 | 158 | 145 | 145 | 151 | 165 |
| | Employees | 970 | 936 | 989 | 991 | 885 | 865 | 849 | 945 | 909 |
| | Payroll | 19,192 | 19,513 | 20,595 | 21,604 | 21,182 | 20,783 | 20,158 | 21,577 | 23,476 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)³

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 59 | 54 | 47 | 42 | 42 | 50 | 54 | 60 | 47 |
| | Employees | 1,150 | 1,217 | 1,242 | 1,106 | 972 | 709 | 753 | 1,381 | 1,050 |
| | Payroll | 71,420 | 91,638 | 94,429 | 50,115 | 37,774 | 50,217 | 53,341 | 100,402 | 82,078 |
| Deep sea freight transportation | Establishments | 69 | 73 | 69 | 57 | 58 | 61 | 65 | 75 | 69 |
| | Employees | 2,622 | 3,729 | 3,190 | 2,486 | 2,801 | 2,279 | 2,374 | 3,345 | 2,485 |
| | Payroll | 207,300 | 226,810 | 208,144 | 169,055 | 180,139 | 159,025 | 177,386 | 231,887 | 140,564 |
| Deep sea passenger transportation | Establishments | 31 | 37 | 34 | 31 | 33 | 29 | 29 | 39 | 31 |
| | Employees | 8,492 | 9,077 | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | 504,625 | 571,590 | ds | ds | ds | ds | ds | ds | ds |
| Marinas | Establishments | 551 | 513 | 493 | 442 | 428 | 430 | 411 | 432 | 444 |
| | Employees | 5,069 | 5,494 | 4,935 | 5,024 | 4,665 | 4,439 | 4,657 | 4,918 | 5,076 |
| | Payroll | 133,384 | 146,390 | 148,592 | 151,677 | 132,955 | 133,017 | 142,997 | 148,573 | 145,265 |
| Marine cargo handling | Establishments | 63 | 66 | 53 | 56 | 59 | 55 | 64 | 43 | 58 |
| | Employees | 6,409 | 7,266 | 6,585 | 8,052 | 7,288 | 7,547 | 7,484 | 4,598 | 6,258 |
| | Payroll | 177,983 | 189,020 | 173,788 | 192,473 | 185,309 | 191,560 | 195,458 | 86,461 | 188,997 |
| Navigational services to shipping | Establishments | 148 | 142 | 145 | 147 | 145 | 145 | 150 | 151 | 180 |
| | Employees | 660 | 781 | 1,484 | 894 | 829 | 980 | 1,047 | 853 | 1,390 |
| | Payroll | 42,200 | 48,370 | 61,470 | 56,917 | 60,641 | 76,853 | 75,561 | 68,366 | 130,893 |
| Port & harbor operations | Establishments | 31 | 27 | 29 | 40 | 32 | 34 | 32 | 66 | 61 |
| | Employees | 973 | 584 | 459 | 712 | 527 | 470 | 377 | 2,082 | 555 |
| | Payroll | 22,606 | 19,417 | 12,872 | 24,668 | 19,006 | 20,525 | 16,879 | 72,554 | 25,439 |
| Ship & boat building | Establishments | 312 | 301 | 296 | 297 | 261 | 248 | 246 | 258 | 259 |
| | Employees | 12,729 | 12,385 | 12,332 | 12,419 | 8,221 | 7,363 | 7,909 | 8,621 | 8,813 |
| | Payroll | 454,209 | 427,888 | 469,382 | 442,096 | 296,537 | 302,909 | 325,942 | 374,831 | 390,853 |

¹ All data presented on this page are for the entire state of Florida, not just West Florida.² The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.³ ds = these data are suppressed.

Tables | Louisiana



2014 Economic Impacts of the Louisiana Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 44,066 | 2,220,879 | 816,203 | 1,115,858 | 42,901 | 2,042,092 | 778,941 | 1,053,888 |
| Commercial Harvesters | 16,609 | 854,636 | 275,397 | 412,406 | 16,609 | 854,636 | 275,397 | 412,406 |
| Seafood Processors & Dealers | 2,743 | 230,163 | 89,275 | 113,874 | 2,659 | 223,105 | 86,538 | 110,383 |
| Importers | 523 | 143,745 | 23,038 | 43,820 | - | - | - | - |
| Seafood Wholesalers & Distributors | 1,240 | 134,463 | 45,808 | 59,295 | 1,146 | 124,239 | 42,324 | 54,787 |
| Retail | 22,951 | 857,872 | 382,685 | 486,463 | 22,487 | 840,112 | 374,681 | 476,314 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 251,678 | 278,292 | 289,288 | 275,701 | 286,993 | 233,559 | 324,123 | 291,721 | 403,650 | 451,371 |
| Finfish & Other | 49,443 | 60,735 | 65,198 | 64,116 | 62,629 | 56,900 | 102,083 | 85,077 | 108,593 | 88,145 |
| Shellfish | 202,235 | 217,557 | 224,090 | 211,585 | 224,364 | 176,658 | 222,040 | 206,644 | 295,057 | 363,226 |
| Key Species | | | | | | | | | | |
| Blue crab | 27,419 | 32,605 | 35,044 | 32,203 | 37,301 | 30,325 | 36,784 | 38,196 | 51,566 | 61,082 |
| Crawfish | 8,360 | 1,290 | 9,034 | 9,507 | 15,547 | 13,971 | 9,914 | 4,998 | 16,490 | 13,430 |
| King mackerel | 1,273 | 1,112 | 1,298 | 1,307 | 1,184 | 1,149 | 1,594 | 1,475 | 1,517 | 2,299 |
| Menhaden | 25,776 | 36,441 | 41,368 | 45,768 | 42,555 | 43,331 | 82,881 | 60,934 | 84,951 | 63,364 |
| Mullet | 946 | 2,061 | 690 | 749 | 73 | 185 | 775 | 976 | 626 | 874 |
| Oysters | 33,305 | 35,999 | 40,148 | 39,009 | 50,950 | 24,986 | 41,652 | 37,832 | 44,835 | 61,365 |
| Red snapper | 3,568 | 4,472 | 2,529 | 2,038 | 2,185 | 2,311 | 2,261 | 2,434 | 4,824 | 6,400 |
| Shrimp | 133,143 | 147,652 | 139,842 | 130,854 | 120,555 | 107,362 | 133,670 | 125,587 | 182,144 | 227,318 |
| Tunas | 7,687 | 7,040 | 8,334 | 4,409 | 6,338 | 1,649 | 3,369 | 7,752 | 4,595 | 4,276 |
| Vermillion snapper | 1,137 | 762 | 991 | 819 | 806 | 399 | 517 | 598 | 474 | 698 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|-----------|---------|-----------|---------|-----------|---------|
| Total Landings | 849,280 | 918,675 | 999,343 | 919,017 | 1,007,474 | 793,377 | 1,311,040 | 993,744 | 1,044,006 | 778,282 |
| Finfish & Other | 681,322 | 714,545 | 814,645 | 759,438 | 806,844 | 665,665 | 1,153,912 | 852,093 | 874,106 | 607,087 |
| Shellfish | 167,959 | 204,130 | 184,698 | 159,579 | 200,631 | 127,712 | 157,128 | 141,650 | 169,901 | 171,195 |
| Key Species | | | | | | | | | | |
| Blue crab | 38,100 | 53,394 | 45,107 | 41,714 | 53,057 | 30,752 | 43,893 | 41,291 | 39,192 | 39,589 |
| Crawfish | 15,177 | 1,469 | 15,848 | 15,735 | 19,312 | 14,557 | 9,599 | 4,216 | 19,676 | 11,230 |
| King mackerel | 867 | 971 | 879 | 789 | 927 | 691 | 1,002 | 969 | 788 | 1,112 |
| Menhaden | 657,702 | 689,853 | 789,621 | 738,092 | 785,575 | 648,561 | 1,131,287 | 828,612 | 850,318 | 585,047 |
| Mullet | 1,238 | 3,361 | 1,375 | 1,503 | 189 | 362 | 1,385 | 1,385 | 609 | 1,136 |
| Oysters | 12,099 | 11,417 | 12,858 | 12,840 | 15,006 | 6,874 | 11,156 | 10,124 | 11,356 | 11,286 |
| Red snapper | 1,316 | 1,653 | 807 | 589 | 667 | 828 | 918 | 980 | 1,216 | 1,481 |
| Shrimp | 102,576 | 137,839 | 110,860 | 89,285 | 113,250 | 75,515 | 92,469 | 85,988 | 99,659 | 109,063 |
| Tunas | 2,296 | 2,143 | 2,476 | 1,248 | 2,009 | 490 | 932 | 2,113 | 1,241 | 1,142 |
| Vermillion snapper | 588 | 365 | 517 | 409 | 412 | 186 | 234 | 261 | 174 | 242 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|------|------|------|------|------|------|------|------|------|------|
| Blue crab | 0.72 | 0.61 | 0.78 | 0.77 | 0.70 | 0.99 | 0.84 | 0.93 | 1.32 | 1.54 |
| Crawfish | 0.55 | 0.88 | 0.57 | 0.60 | 0.81 | 0.96 | 1.03 | 1.19 | 0.84 | 1.20 |
| King mackerel | 1.47 | 1.15 | 1.48 | 1.66 | 1.28 | 1.66 | 1.59 | 1.52 | 1.93 | 2.07 |
| Menhaden | 0.04 | 0.05 | 0.05 | 0.06 | 0.05 | 0.07 | 0.07 | 0.07 | 0.10 | 0.11 |
| Mullet | 0.76 | 0.61 | 0.50 | 0.50 | 0.39 | 0.51 | 0.56 | 0.70 | 1.03 | 0.77 |
| Oysters | 2.75 | 3.15 | 3.12 | 3.04 | 3.40 | 3.63 | 3.73 | 3.74 | 3.95 | 5.44 |
| Red snapper | 2.71 | 2.71 | 3.13 | 3.46 | 3.28 | 2.79 | 2.46 | 2.48 | 3.97 | 4.32 |
| Shrimp | 1.30 | 1.07 | 1.26 | 1.47 | 1.06 | 1.42 | 1.45 | 1.46 | 1.83 | 2.08 |
| Tunas | 3.35 | 3.29 | 3.37 | 3.53 | 3.16 | 3.37 | 3.62 | 3.67 | 3.70 | 3.74 |
| Vermillion snapper | 1.93 | 2.09 | 1.92 | 2.00 | 1.95 | 2.15 | 2.21 | 2.30 | 2.73 | 2.89 |

2014 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 633 | 70,164 | 32,540 | 42,749 |
| | Private Boat | 873 | 106,015 | 33,029 | 61,075 |
| | Shore | 265 | 30,922 | 9,487 | 17,410 |
| Total Durable Expenditures | | 13,470 | 1,412,576 | 587,414 | 908,047 |
| Total State Economic Impacts | | 15,241 | 1,619,677 | 662,470 | 1,029,281 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 27,377 | 13,298 | Fishing Tackle | 240,695 |
| Private Boat | 8,636 | 75,838 | Other Equipment | 118,752 |
| Shore | 3,855 | 21,785 | Boat Expenses | 990,445 |
| Total | 39,869 | 110,921 | Vehicle Expenses | 190,325 |
| | | | Second Home Expenses | 16,162 |
| | | | Total Durable Expenditures | 1,556,378 |
| Total State Trip and Durable Goods Expenditures | | | | 1,707,168 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 ¹ |
|---------------|------|-------|-------|-------|------|------|------|------|-------|-------------------|
| Coastal | 706 | 868 | 853 | 795 | 669 | 609 | 690 | 651 | 709 | |
| Non-Coastal | 68 | 108 | 124 | 120 | 108 | 67 | 86 | 77 | 109 | |
| Out-of-State | 138 | 198 | 157 | 170 | 139 | 120 | 183 | 165 | 262 | |
| Total Anglers | 912 | 1,174 | 1,134 | 1,085 | 916 | 796 | 959 | 893 | 1,080 | |

Recreational Fishing Effort by Mode (thousands of angler trips)²

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| For-Hire | 123 | 187 | 144 | 179 | 183 | 79 | 113 | 115 | 122 | 130 |
| Private | 2,784 | 2,801 | 3,156 | 3,508 | 3,176 | 3,055 | 3,342 | 2,891 | 3,190 | 2,058 |
| Shore | 1,159 | 775 | 889 | 933 | 769 | 729 | 1,122 | 1,131 | 1,349 | 0 |
| Total Trips | 4,066 | 3,763 | 4,189 | 4,620 | 4,128 | 3,863 | 4,577 | 4,137 | 4,661 | 2,188 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)^{3,4}

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|---|-------|--------|-------|--------|--------|-------|--------|-------|-------|-------|
| Black drum | H | 309 | 368 | 386 | 543 | 519 | 399 | 468 | 424 | 455 | 200 |
| | R | 651 | 717 | 729 | 1,116 | 974 | 1,033 | 1,085 | 882 | 1,639 | 0 |
| Drum (Atlantic croaker) | H | 443 | 805 | 684 | 357 | 470 | 229 | 606 | 520 | 829 | 235 |
| | R | 963 | 1,143 | 1,006 | 1,187 | 1,100 | 1,268 | 2,319 | 1,676 | 1,797 | 0 |
| Drum (sand seatrout) | H | 974 | 775 | 889 | 1,085 | 879 | 1,065 | 1,188 | 895 | 755 | 358 |
| | R | 254 | 453 | 540 | 824 | 854 | 514 | 1,032 | 679 | 990 | 0 |
| Drum (spotted seatrout) | H | 7,435 | 10,872 | 8,930 | 11,705 | 10,558 | 7,857 | 10,441 | 9,608 | 9,004 | 3,115 |
| | R | 7,304 | 9,026 | 7,394 | 9,580 | 7,975 | 5,054 | 5,802 | 6,776 | 9,709 | 0 |
| Drum (southern kingfish) | H | 240 | 89 | 67 | 74 | 103 | 41 | 17 | 110 | 15 | 4 |
| | R | 187 | 151 | 28 | 119 | 59 | 47 | 25 | 40 | 65 | 0 |
| Porgies (sheepshead) | H | 644 | 325 | 270 | 705 | 704 | 430 | 869 | 397 | 368 | 250 |
| | R | 429 | 463 | 288 | 448 | 473 | 440 | 188 | 237 | 477 | 0 |
| Red drum | H | 1,626 | 1,828 | 2,308 | 2,673 | 2,237 | 2,812 | 3,023 | 2,010 | 3,169 | 1,265 |
| | R | 2,652 | 3,321 | 3,455 | 4,074 | 3,734 | 4,111 | 3,195 | 2,871 | 4,675 | 0 |
| Red snapper | H | 111 | 172 | 160 | 85 | 98 | 7 | 31 | 102 | 83 | 68 |
| | R | 339 | 429 | 285 | 261 | 195 | 7 | 109 | 131 | 223 | 0 |
| Southern flounder | H | 280 | 290 | 349 | 235 | 286 | 327 | 399 | 331 | 685 | 213 |
| | R | 76 | 54 | 67 | 37 | 50 | 72 | 61 | 97 | 134 | 0 |
| Yellowfin tuna | H | 10 | 14 | 8 | 17 | 3 | 1 | 13 | 25 | 11 | 10 |
| | R | 1 | 1 | 1 | 7 | 0 | 0 | 4 | 3 | 2 | 0 |

¹ Louisiana data not available for 2014.² Effort for 2014 is estimated using data from a state creel survey and does not capture shore-based effort separately from private boat effort.³ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.⁴ Harvest and release totals for 2014 are estimated using data from a state creel survey.

Louisiana | Marine Economy

Louisiana's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|----------|-----------------|------------------|------------------------------|-------------------------------------|-----------------------------------|---|
| 2005 | 102,790 (1.4%) | 1,617,507 (1.4%) | 50.66 (1.1%) | 84.68 (1.2%) | 200.44 (1.5%) | 2.28 |
| 2013 | 104,375 (1.4%) | 1,687,956 (1.4%) | 72.07 (1.3%) | 112.97 (1.3%) | 246.66 (1.5%) | 1.93 |
| % Change | 1.5 | 4.2 | 29.7 | 25.0 | 18.7 | -15.4 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Firms | 76 | 99 | 85 | 77 | 68 | 120 | 94 | 78 | 99 |
| | Receipts | 8,513 | 8,179 | 6,523 | 7,365 | 5,308 | 10,358 | 9,308 | 8,492 | 9,136 |
| Seafood sales, retail | Firms | 156 | 181 | 196 | 182 | 173 | 197 | 192 | 184 | 173 |
| | Receipts | 14,585 | 20,046 | 20,932 | 25,900 | 17,622 | 16,001 | 18,758 | 16,804 | 17,538 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 50 | 40 | 41 | 36 | 38 | 34 | 33 | 35 | 36 |
| | Employees | 1,556 | 1,506 | 1,253 | 991 | 1,301 | 1,209 | 1,006 | 1,117 | 964 |
| | Payroll | 43,801 | 45,439 | 41,391 | 32,382 | 37,657 | 35,770 | 46,440 | 51,237 | 49,339 |
| Seafood sales, wholesale | Establishments | 128 | 112 | 119 | 98 | 98 | 97 | 94 | 103 | 106 |
| | Employees | 1,037 | 807 | 954 | 739 | 702 | 683 | 767 | 862 | 846 |
| | Payroll | 17,649 | 21,243 | 21,604 | 15,858 | 17,261 | 15,554 | 18,427 | 22,296 | 23,235 |
| Seafood sales, retail | Establishments | 106 | 101 | 101 | 107 | 106 | 101 | 100 | 97 | 94 |
| | Employees | 723 | 759 | 781 | 681 | 703 | 527 | 590 | 704 | 643 |
| | Payroll | 8,277 | 10,560 | 11,827 | 11,141 | 11,564 | 11,214 | 11,090 | 13,042 | 11,213 |

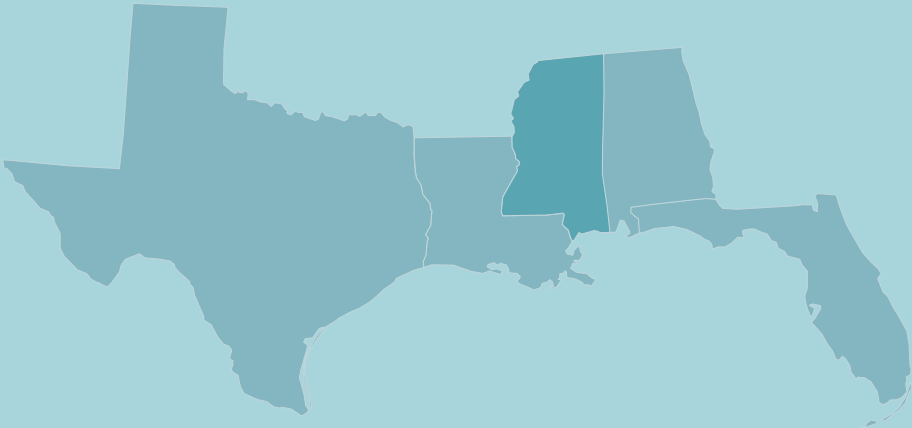
Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)²

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 136 | 137 | 138 | 123 | 117 | 125 | 125 | 105 | 102 |
| | Employees | 5,771 | 6,397 | 7,680 | 6,506 | 6,077 | 5,610 | 5,834 | 6,422 | 5,317 |
| | Payroll | 294,941 | 386,136 | 527,290 | 549,388 | 391,914 | 405,796 | 417,362 | 497,165 | 458,589 |
| Deep sea freight transportation | Establishments | 25 | 24 | 22 | 18 | 21 | 16 | 17 | 18 | 11 |
| | Employees | ds | 595 | 685 | 1,095 | 1,192 | 93 | 93 | ds | 95 |
| | Payroll | ds | 35,269 | 39,843 | 87,479 | 91,760 | 6,147 | 5,608 | ds | 5,435 |
| Deep sea passenger transportation | Establishments | 3 | 2 | 3 | 2 | 2 | 1 | 3 | 2 | 4 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | 3 |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | 363 |
| Marinas | Establishments | 53 | 41 | 50 | 43 | 43 | 43 | 45 | 44 | 41 |
| | Employees | 352 | ds | 378 | 274 | 244 | 314 | 329 | 257 | 250 |
| | Payroll | 10,213 | ds | 17,794 | 9,581 | 8,989 | 14,716 | 10,771 | 9,209 | 8,693 |
| Marine cargo handling | Establishments | 46 | 51 | 49 | 39 | 44 | 41 | 42 | 37 | 44 |
| | Employees | 3,263 | 3,100 | 2,978 | 2,010 | 2,193 | 2,511 | 2,526 | 2,016 | 2,834 |
| | Payroll | 110,129 | 118,748 | 128,207 | 85,484 | 92,883 | 105,063 | 108,491 | 93,896 | 174,054 |
| Navigational services to shipping | Establishments | 120 | 129 | 128 | 145 | 137 | 138 | 138 | 136 | 133 |
| | Employees | 2,136 | 2,204 | 2,508 | 2,884 | 2,893 | 3,176 | 3,396 | 2,545 | 2,533 |
| | Payroll | 96,202 | 115,222 | 141,757 | 183,381 | 175,271 | 224,533 | 208,306 | 162,094 | 169,795 |
| Port & harbor operations | Establishments | 18 | 18 | 14 | 22 | 17 | 21 | 20 | 46 | 18 |
| | Employees | 418 | 436 | 467 | 517 | 440 | 431 | 461 | 1,205 | 443 |
| | Payroll | 19,510 | 29,676 | 31,734 | 37,181 | 33,907 | 38,776 | 38,745 | 80,780 | 37,122 |
| Ship & boat building | Establishments | 111 | 108 | 112 | 117 | 109 | 109 | 109 | 116 | 110 |
| | Employees | 11,016 | 11,521 | 12,808 | 12,815 | 12,521 | 11,737 | 11,722 | 10,933 | 7,413 |
| | Payroll | 376,407 | 437,028 | 503,199 | 619,606 | 613,188 | 600,259 | 639,047 | 631,098 | 416,319 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

Tables | Mississippi



Mississippi | Commercial Fisheries

2014 Economic Impacts of the Mississippi Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|---------|--------|-------------|-----------------|---------|--------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 4,714 | 198,608 | 79,501 | 102,731 | 4,704 | 197,129 | 79,189 | 102,217 |
| Commercial Harvesters | 845 | 42,238 | 12,725 | 18,695 | 845 | 42,238 | 12,725 | 18,695 |
| Seafood Processors & Dealers | 714 | 53,243 | 21,064 | 26,394 | 713 | 53,137 | 21,022 | 26,341 |
| Importers | 4 | 1,171 | 188 | 357 | - | - | - | - |
| Seafood Wholesalers & Distributors | 58 | 5,307 | 1,873 | 2,359 | 57 | 5,225 | 1,844 | 2,323 |
| Retail | 3,093 | 96,648 | 43,651 | 54,925 | 3,089 | 96,528 | 43,597 | 54,857 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total Revenue | 23,386 | 21,586 | 39,340 | 43,696 | 37,956 | 21,895 | 30,291 | 49,335 | 34,953 | 25,995 |
| Finfish & Other | 7,804 | 8,959 | 21,359 | 19,233 | 18,667 | 8,963 | 10,527 | 23,172 | 10,938 | 8,102 |
| Shellfish | 15,582 | 12,628 | 17,981 | 24,464 | 19,289 | 12,932 | 19,764 | 26,163 | 24,015 | 17,893 |
| Key Species | | | | | | | | | | |
| Blue crab | 433 | 928 | 741 | 447 | 573 | 366 | 318 | 724 | 416 | 997 |
| Flounders | 20 | 36 | 58 | 40 | 58 | 64 | 118 | 101 | 45 | 55 |
| Menhaden | 7,074 | 8,447 | 20,658 | 18,534 | 17,987 | 8,378 | 9,871 | 22,394 | 10,230 | 7,358 |
| Mulletts | 38 | 23 | 35 | 32 | 30 | 31 | 56 | 63 | 61 | 25 |
| Oysters | 1,447 | NA | 819 | 6,858 | 6,094 | 4,268 | 928 | 1,596 | 1,544 | 1,685 |
| Red snapper | 115 | NA | NA | NA | 158 | NA | 168 | 226 | NA | 307 |
| Shrimp | 13,698 | 11,699 | 16,418 | 17,146 | 12,612 | 8,293 | 18,514 | 23,844 | 22,055 | 15,210 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 167,610 | 221,720 | 227,834 | 201,822 | 230,255 | 111,229 | 278,075 | 263,641 | 180,595 | 190,548 |
| Finfish & Other | 158,721 | 212,213 | 216,375 | 190,191 | 217,461 | 105,274 | 267,407 | 249,382 | 171,000 | 184,393 |
| Shellfish | 8,889 | 9,507 | 11,459 | 11,631 | 12,794 | 5,955 | 10,668 | 14,259 | 9,594 | 6,154 |
| Key Species | | | | | | | | | | |
| Blue crab | 429 | 1,127 | 737 | 450 | 545 | 366 | 370 | 782 | 359 | 570 |
| Flounders | 10 | 16 | 25 | 17 | 25 | 28 | 55 | 43 | 19 | 21 |
| Menhaden | 157,194 | 211,163 | 215,182 | 189,118 | 216,709 | 104,729 | 266,774 | 248,824 | 170,500 | 183,950 |
| Mulletts | 99 | 66 | 70 | 57 | 62 | 59 | 93 | 99 | 95 | 39 |
| Oysters | 610 | NA | 299 | 2,606 | 2,189 | 1,453 | 247 | 425 | 336 | 321 |
| Red snapper | 54 | NA | NA | NA | 57 | NA | 86 | 115 | NA | 170 |
| Shrimp | 7,848 | 8,380 | 10,421 | 8,570 | 10,054 | 4,135 | 10,048 | 13,051 | 8,899 | 5,263 |

Average Annual Price of Key Species/Species Groups (dollars per pound)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|------|------|------|------|------|------|------|------|------|------|
| Blue crab | 1.01 | 0.82 | 1.01 | 0.99 | 1.05 | 1.00 | 0.86 | 0.93 | 1.16 | 1.75 |
| Flounders | 1.88 | 2.22 | 2.38 | 2.36 | 2.34 | 2.33 | 2.14 | 2.33 | 2.38 | 2.66 |
| Menhaden | 0.05 | 0.04 | 0.10 | 0.10 | 0.08 | 0.08 | 0.04 | 0.09 | 0.06 | 0.04 |
| Mulletts | 0.38 | 0.35 | 0.50 | 0.57 | 0.48 | 0.52 | 0.61 | 0.64 | 0.64 | 0.64 |
| Oysters | 2.37 | NA | 2.74 | 2.63 | 2.78 | 2.94 | 3.75 | 3.75 | 4.59 | 5.25 |
| Red snapper | 2.13 | NA | NA | NA | 2.75 | NA | 1.96 | 1.97 | NA | 1.81 |
| Shrimp | 1.75 | 1.40 | 1.58 | 2.00 | 1.25 | 2.01 | 1.84 | 1.83 | 2.48 | 2.89 |

¹ NA = these data are confidential and therefore not disclosable.

2014 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|-------|---------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 90 | 7,206 | 2,496 | 3,520 |
| | Private Boat | 204 | 20,395 | 6,665 | 11,397 |
| | Shore | 140 | 12,508 | 4,203 | 6,967 |
| Total Durable Expenditures | | 3,740 | 333,954 | 144,408 | 225,397 |
| Total State Economic Impacts | | 4,174 | 374,063 | 157,772 | 247,281 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | Fishing Tackle | 81,725 |
| For-Hire | 2,310 | 2,084 | Other Equipment | 41,474 |
| Private Boat | 1,113 | 21,104 | Boat Expenses | 269,621 |
| Shore | 2,612 | 10,010 | Vehicle Expenses | 79,531 |
| Total | 6,034 | 33,197 | Second Home Expenses | 281 |
| | | | Total Durable Expenditures | 472,632 |
| Total State Trip and Durable Goods Expenditures | | | | 511,863 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------|------|------|------|------|------|------|------|------|------|------|
| Coastal | 108 | 143 | 196 | 119 | 125 | 137 | 160 | 179 | 171 | 171 |
| Non-Coastal | 29 | 23 | 34 | 26 | 36 | 29 | 48 | 60 | 67 | 62 |
| Out-of-State | 39 | 27 | 55 | 48 | 50 | 50 | 60 | 91 | 101 | 94 |
| Total Anglers | 176 | 193 | 285 | 193 | 211 | 216 | 268 | 330 | 339 | 327 |

Recreational Fishing Effort by Mode (thousands of angler trips)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------|------|------|-------|------|-------|-------|-------|-------|-------|-------|
| For-Hire | 8 | 7 | 21 | 13 | 11 | 7 | 11 | 11 | 11 | 16 |
| Private | 483 | 626 | 834 | 596 | 759 | 629 | 843 | 991 | 986 | 621 |
| Shore | 435 | 291 | 349 | 359 | 310 | 597 | 761 | 948 | 764 | 843 |
| Total Trips | 926 | 924 | 1,204 | 968 | 1,080 | 1,233 | 1,615 | 1,950 | 1,761 | 1,480 |

Harvest (H) & Release (R) of Key Species/Species Groups (thousands of fish)¹

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------------------------|---|------|------|------|-------|-------|------|-------|-------|-------|------|
| Drum (Atlantic croaker) | H | 41 | 59 | 72 | 182 | 340 | 209 | 453 | 317 | 330 | 820 |
| | R | 208 | 190 | 264 | 388 | 716 | 422 | 606 | 695 | 329 | 376 |
| Drum (kingfishes) ² | H | 225 | 163 | 161 | 181 | 126 | 173 | 177 | 234 | 519 | 190 |
| | R | 62 | 30 | 48 | 58 | 61 | 47 | 36 | 157 | 94 | 31 |
| Drum (sand and silver seatrouts) | H | 222 | 305 | 296 | 351 | 1,004 | 986 | 1,336 | 1,151 | 917 | 892 |
| | R | 117 | 173 | 230 | 166 | 378 | 246 | 471 | 574 | 327 | 113 |
| Drum (spotted seatrout) | H | 317 | 470 | 385 | 608 | 1,090 | 556 | 841 | 776 | 1,016 | 416 |
| | R | 838 | 975 | 909 | 1,009 | 960 | 586 | 634 | 1,394 | 1,298 | 743 |
| Porgies (sheepshead) | H | 27 | 36 | 17 | 17 | 22 | 43 | 260 | 115 | 94 | 76 |
| | R | 23 | 22 | 11 | 25 | 9 | 3 | 24 | 54 | 65 | 27 |
| Red drum | H | 36 | 58 | 43 | 76 | 84 | 77 | 90 | 141 | 148 | 106 |
| | R | 143 | 99 | 73 | 153 | 240 | 213 | 209 | 853 | 403 | 515 |
| Red snapper | H | 1 | 7 | 2 | 9 | 15 | 1 | 7 | 27 | 35 | 6 |
| | R | 51 | 52 | 9 | 104 | 55 | 25 | 0 | 2 | 95 | 41 |
| Sharks ³ | H | 9 | 4 | 4 | 3 | 21 | 71 | 35 | 15 | 89 | 5 |
| | R | 36 | 38 | 41 | 31 | 36 | 87 | 37 | 103 | 75 | 45 |
| Southern flounder | H | 72 | 47 | 121 | 110 | 209 | 196 | 182 | 227 | 215 | 168 |
| | R | 30 | 35 | 31 | 45 | 120 | 79 | 99 | 153 | 160 | 54 |
| Striped mullet | H | 34 | 2 | 66 | 79 | 119 | 188 | 491 | 396 | 647 | 602 |
| | R | 0 | 3 | 14 | 4 | 4 | 13 | 83 | 108 | 19 | 5 |

¹ In this table, '0' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.² Kingfishes include southern kingfish and Gulf kingfish.³ Sharks include species within the requiem shark family, blacktip sharks, Atlantic sharpnose sharks and unidentified sharks.

Mississippi | Marine Economy

Mississippi's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|----------|-----------------|----------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 60,542 (0.8%) | 926,952 (0.8%) | 25.8 (0.6%) | 46.03 (0.7%) | 82.27 (0.6%) | 1.96 |
| 2013 | 58,435 (0.8%) | 902,638 (0.8%) | 31.7 (0.6%) | 55.14 (0.6%) | 104.09 (0.6%) | 1.18 |
| % Change | -3.6 | -2.7 | 18.6 | 16.5 | 21.0 | -39.8 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product prep. & packaging | Firms | 12 | 22 | ds | 17 | 16 | 30 | 25 | 27 | ds |
| | Receipts | 1,045 | 1,537 | ds | 1,055 | 753 | 1,937 | 2,108 | 930 | ds |
| Seafood sales, retail | Firms | 41 | 53 | 57 | 48 | 56 | 69 | 51 | 50 | 54 |
| | Receipts | 2,934 | 4,021 | 4,126 | 3,437 | 4,206 | 3,421 | 3,505 | 3,957 | 3,855 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 28 | 24 | 22 | 20 | 20 | 20 | 18 | 18 | 19 |
| | Employees | 3,637 | 3,353 | 3,022 | 3,062 | 2,796 | 2,849 | 2,464 | 2,368 | 2,284 |
| | Payroll | 63,957 | 60,510 | 60,633 | 61,723 | 61,926 | 61,731 | 52,502 | 55,407 | 59,212 |
| Seafood sales, wholesale | Establishments | 30 | 23 | 25 | 18 | 16 | 18 | 18 | 17 | 14 |
| | Employees | 145 | 58 | 106 | 61 | 113 | 0 | 64 | 102 | 0 |
| | Payroll | 1,822 | 2,063 | 3,285 | 3,088 | 2,836 | 2,542 | 2,532 | 4,412 | 1,546 |
| Seafood sales, retail | Establishments | 21 | 12 | 15 | 18 | 14 | 15 | 17 | 13 | 13 |
| | Employees | 57 | 41 | 0 | 50 | 46 | 50 | 58 | 0 | 0 |
| | Payroll | 521 | 395 | 0 | 699 | 841 | 810 | 838 | 1,902 | 0 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

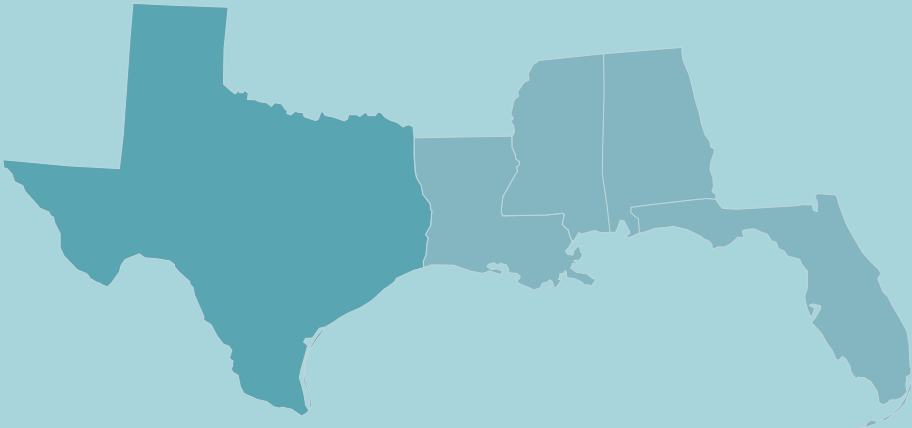
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|-------|-------|-------|-------|-------|--------|
| Coastal & Great Lakes freight transportation | Establishments | 5 | 5 | 4 | 5 | 5 | 4 | 4 | 4 | 6 |
| | Employees | ds | ds | ds | 119 | 114 | ds | 127 | ds | 230 |
| | Payroll | ds | ds | 7,585 | 8,351 | 7,730 | 8,058 | 7,233 | ds | 17,080 |
| Deep sea freight transportation | Establishments | 3 | 3 | 1 | 0 | 1 | 1 | 1 | 2 | 1 |
| | Employees | ds | ds | ds | NA | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | NA | ds | ds | ds | ds | ds |
| Deep sea passenger transportation | Establishments | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Employees | ds | ds | ds | NA | NA | NA | NA | NA | NA |
| | Payroll | ds | ds | ds | NA | NA | NA | NA | NA | NA |
| Marinas | Establishments | 25 | 16 | 19 | 17 | 13 | 18 | 19 | 16 | 16 |
| | Employees | 158 | ds | ds | 111 | 172 | 183 | 189 | 204 | 154 |
| | Payroll | 2,358 | ds | 2,145 | 2,794 | 3,479 | 4,163 | 5,137 | 5,361 | 3,972 |
| Marine cargo handling | Establishments | 6 | 5 | 5 | 7 | 8 | 7 | 7 | 2 | 4 |
| | Employees | ds | 238 | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | 8,621 | ds | ds | ds | ds | ds | ds | ds |
| Navigational services to shipping | Establishments | 8 | 8 | 9 | 8 | 7 | 8 | 6 | 7 | 6 |
| | Employees | ds | ds | ds | ds | ds | 141 | ds | ds | ds |
| | Payroll | ds | ds | 1,754 | ds | ds | 6,982 | ds | ds | ds |
| Port & harbor operations | Establishments | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 3 | 2 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | ds | ds |
| Ship & boat building | Establishments | 17 | 20 | 23 | 24 | 20 | 20 | 20 | 18 | 19 |
| | Employees | 11,845 | 11,909 | 14,578 | ds | ds | ds | ds | ds | ds |
| | Payroll | 471,243 | 498,660 | 615,837 | ds | ds | ds | ds | ds | ds |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not applicable.

Tables | Texas



2014 Economic Impacts of the Texas Seafood Industry (thousands of dollars)

| | With Imports | | | | Without Imports | | | |
|------------------------------------|--------------|-----------|---------|-------------|-----------------|-----------|---------|-------------|
| | #Jobs | Sales | Income | Value Added | #Jobs | Sales | Income | Value Added |
| Total Impacts | 33,880 | 2,857,586 | 826,213 | 1,238,477 | 26,496 | 1,568,259 | 567,146 | 796,557 |
| Commercial Harvesters | 6,889 | 590,201 | 169,040 | 272,087 | 6,889 | 590,201 | 169,040 | 272,087 |
| Seafood Processors & Dealers | 2,391 | 195,657 | 73,604 | 96,939 | 2,204 | 180,327 | 67,838 | 89,344 |
| Importers | 3,842 | 1,056,873 | 169,384 | 322,181 | - | - | - | - |
| Seafood Wholesalers & Distributors | 1,571 | 207,484 | 69,229 | 95,869 | 789 | 104,273 | 34,792 | 48,180 |
| Retail | 19,187 | 807,372 | 344,955 | 451,400 | 16,614 | 693,459 | 295,476 | 386,945 |

Total Landings Revenue & Landings Revenue of Key Species/Species Groups (thousands of dollars)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 172,337 | 197,291 | 180,575 | 176,098 | 154,530 | 203,795 | 240,566 | 215,083 | 267,998 | 278,353 |
| Finfish & Other | 10,813 | 11,359 | 9,452 | 7,709 | 7,488 | 7,888 | 8,445 | 10,231 | 13,361 | 13,709 |
| Shellfish | 161,523 | 185,932 | 171,123 | 168,389 | 147,043 | 195,907 | 232,121 | 204,852 | 254,637 | 264,644 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 415 | 500 | 450 | 446 | 484 | 531 | 622 | 743 | 819 | 681 |
| Black drum | 1,917 | 2,013 | 1,660 | 1,363 | 1,377 | 1,573 | 1,448 | 1,491 | 1,699 | 1,981 |
| Blue crab | 2,410 | 1,459 | 2,763 | 2,342 | 2,454 | 3,134 | 2,845 | 2,878 | 2,331 | 3,050 |
| Flounders | 276 | 164 | 62 | 144 | 91 | 62 | 205 | 175 | 73 | 97 |
| Groupers | 795 | 628 | 417 | 553 | 641 | 356 | 549 | 723 | 1,121 | 1,128 |
| Oysters | 15,883 | 17,263 | 19,246 | 8,835 | 9,376 | 19,144 | 12,789 | 21,302 | 23,465 | 19,221 |
| Red snapper | 5,345 | 6,168 | 3,762 | 2,744 | 2,398 | 3,009 | 3,254 | 4,448 | 7,324 | 7,617 |
| Shrimp | 143,045 | 167,108 | 149,084 | 157,187 | 135,100 | 173,556 | 216,382 | 180,562 | 228,768 | 242,299 |
| Tunas | 340 | 0 | NA | 94 | 139 | 4 | 2 | 5 | 7 | 14 |
| Vermilion snapper | 571 | 642 | 1,554 | 1,430 | 1,233 | 1,337 | 1,274 | 1,434 | 659 | 604 |

Total Landings & Landings of Key Species/Species Groups (thousands of pounds)¹

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------|--------|---------|--------|--------|---------|--------|--------|--------|--------|--------|
| Total Landings | 84,289 | 117,131 | 87,912 | 73,048 | 102,351 | 89,721 | 98,857 | 91,438 | 84,875 | 73,491 |
| Finfish & Other | 5,782 | 5,825 | 4,800 | 3,866 | 4,134 | 4,247 | 4,224 | 4,225 | 4,872 | 4,842 |
| Shellfish | 78,507 | 111,306 | 83,111 | 69,182 | 98,216 | 85,475 | 94,633 | 87,213 | 80,003 | 68,650 |
| Key Species | | | | | | | | | | |
| Atlantic croaker | 58 | 67 | 62 | 59 | 63 | 67 | 79 | 89 | 96 | 78 |
| Black drum | 2,077 | 2,212 | 1,687 | 1,468 | 1,610 | 1,729 | 1,795 | 1,623 | 1,689 | 1,747 |
| Blue crab | 3,119 | 1,966 | 3,454 | 2,635 | 2,844 | 3,436 | 2,893 | 2,853 | 1,902 | 2,234 |
| Flounders | 144 | 68 | 24 | 58 | 32 | 26 | 75 | 60 | 20 | 25 |
| Groupers | 303 | 220 | 141 | 170 | 208 | 144 | 190 | 211 | 292 | 273 |
| Oysters | 5,007 | 4,923 | 5,633 | 2,679 | 2,733 | 5,265 | 3,943 | 5,817 | 6,126 | 4,129 |
| Red snapper | 1,940 | 2,158 | 1,213 | 870 | 851 | 1,031 | 948 | 1,123 | 1,800 | 1,797 |
| Shrimp | 70,310 | 104,378 | 74,007 | 63,855 | 92,602 | 76,734 | 87,753 | 78,507 | 71,948 | 62,265 |
| Tunas | 112 | 0 | NA | 22 | 45 | 1 | 1 | 3 | 3 | 6 |
| Vermilion snapper | 279 | 273 | 672 | 592 | 561 | 539 | 465 | 511 | 234 | 203 |

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|------|------|------|------|------|------|------|------|------|------|
| Atlantic croaker | 7.14 | 7.43 | 7.29 | 7.58 | 7.64 | 7.98 | 7.84 | 8.31 | 8.55 | 8.77 |
| Black drum | 0.92 | 0.91 | 0.98 | 0.93 | 0.86 | 0.91 | 0.81 | 0.92 | 1.01 | 1.13 |
| Blue crab | 0.77 | 0.74 | 0.80 | 0.89 | 0.86 | 0.91 | 0.98 | 1.01 | 1.23 | 1.37 |
| Flounders | 1.92 | 2.42 | 2.55 | 2.48 | 2.84 | 2.37 | 2.75 | 2.94 | 3.55 | 3.89 |
| Groupers | 2.62 | 2.85 | 2.96 | 3.25 | 3.07 | 2.47 | 2.88 | 3.42 | 3.84 | 4.13 |
| Oysters | 3.17 | 3.51 | 3.42 | 3.30 | 3.43 | 3.64 | 3.24 | 3.66 | 3.83 | 4.66 |
| Red snapper | 2.76 | 2.86 | 3.10 | 3.15 | 2.82 | 2.92 | 3.43 | 3.96 | 4.07 | 4.24 |
| Shrimp | 2.03 | 1.60 | 2.01 | 2.46 | 1.46 | 2.26 | 2.47 | 2.30 | 3.18 | 3.89 |
| Tunas | 3.04 | 0.69 | NA | 4.26 | 3.08 | 3.19 | 1.82 | 1.83 | 2.10 | 2.29 |
| Vermilion snapper | 2.05 | 2.35 | 2.31 | 2.42 | 2.20 | 2.48 | 2.74 | 2.81 | 2.81 | 2.98 |

¹ NA = these data are confidential thus not disclosable.

2014 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

| | | #Jobs | Sales | Income | Value Added |
|------------------------------|--------------|--------|-----------|---------|-------------|
| Trip Impacts by Fishing Mode | For-Hire | 948 | 99,716 | 38,693 | 57,356 |
| | Private Boat | 2,150 | 252,000 | 86,743 | 147,480 |
| | Shore | 2,478 | 275,325 | 94,377 | 160,547 |
| Total Durable Expenditures | | 10,920 | 1,198,249 | 537,214 | 839,763 |
| Total State Economic Impacts | | 16,496 | 1,825,290 | 757,027 | 1,205,146 |

2014 Angler Trip & Durable Goods Expenditures (thousands of dollars)¹

| Fishing Mode | Trip Expenditures | | Equipment | Durable Goods Expenditures |
|---|-------------------|-----------|----------------------------|----------------------------|
| | Non-Residents | Residents | | |
| For-Hire | 3,677 | 51,052 | Fishing Tackle | 249,065 |
| Private Boat | 5,581 | 159,017 | Other Equipment | 145,510 |
| Shore | 15,043 | 162,357 | Boat Expenses | 490,059 |
| Total | 24,302 | 372,426 | Vehicle Expenses | 395,973 |
| | | | Second Home Expenses | 39,100 |
| | | | Total Durable Expenditures | 1,319,707 |
| Total State Trip and Durable Goods Expenditures | | | | 1,716,435 |

Harvest (H) of Key Species Species Groups (thousands of fish)²

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------|------|------|------|------|------|------|-------|------|------|------|
| Atlantic croaker | 95 | 101 | 95 | 64 | 117 | 125 | 157 | 157 | 152 | 117 |
| Black drum | 53 | 73 | 66 | 82 | 98 | 165 | 129 | 257 | 150 | 139 |
| King mackerel | 14 | 29 | 11 | 8 | 16 | 6 | 9 | 9 | 10 | 13 |
| Red drum | 231 | 318 | 289 | 266 | 285 | 264 | 347 | 323 | 269 | 247 |
| Red snapper | 49 | 69 | 45 | 41 | 31 | 33 | 36 | 34 | 48 | 40 |
| Sand seatrout | 125 | 129 | 95 | 152 | 111 | 127 | 227 | 177 | 151 | 147 |
| Sheepshead | 81 | 78 | 46 | 46 | 34 | 49 | 57 | 143 | 84 | 39 |
| Southern flounder | 81 | 64 | 49 | 64 | 47 | 30 | 92 | 96 | 92 | 71 |
| Spotted seatrout | 855 | 987 | 916 | 917 | 810 | 732 | 1,137 | 810 | 796 | 590 |

¹ The Marine Recreational Information Program (MRIP) does not collect participation (number of anglers) or effort (number of trips) data for Texas. To calculate trip expenditure estimates, effort by fishing mode was estimated based on 2013 data provided by the Texas Parks and Wildlife Department (TPWD). These effort estimates were reviewed by the TPWD. To calculate angler expenditure estimates (durable equipment expenditures), participation estimates were based on the sum of saltwater licenses sold in Texas plus a proportion of combination licenses sold in Texas. A change in the method of reporting landings occurred in 2007 so data from 2007 is not comparable to earlier years.

² Data collected by the TPWG is reported in this table. The data collected by the TPWD differs from the data collected and reported in the MRIP. Data on the number of fish released are not reported by TPWD. Please see the TPWD for more information: www.tpwd.state.tx.us/fishboat/.

Texas's State Economy (% of national total)

| | #Establishments | #Employees | Annual Payroll (\$ billions) | Employee Compensation (\$ billions) | Gross State Product (\$ billions) | Commercial Fishing Location Quotient ¹ |
|----------|-----------------|------------------|---------------------------------|--|--------------------------------------|---|
| 2005 | 497,758 (6.6%) | 8,305,102 (7.1%) | 315.81 (7%) | 491.28 (6.9%) | 999.64 (7.7%) | 0.38 |
| 2013 | 547,190 (7.3%) | 9,663,567 (8.2%) | 468.42 (8.3%) | 713.14 (8.1%) | 1,557.19 (9.3%) | 0.24 |
| % Change | 9.0 | 14.1 | 32.6 | 31.1 | 35.8 | -36.8 |

Seafood Sales & Processing - Non-Employer Firms (thousands of dollars)

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Firms | 108 | 109 | 94 | 85 | 82 | 99 | 119 | 123 | 123 |
| | Receipts | 2,228 | 2,974 | 5,386 | 3,466 | 3,858 | 3,224 | 5,734 | 6,675 | 7,484 |
| Seafood sales, retail | Firms | 159 | 141 | 182 | 188 | 196 | 184 | 171 | 194 | 173 |
| | Receipts | 19,534 | 18,355 | 17,442 | 18,204 | 13,177 | 12,124 | 13,433 | 14,891 | 15,094 |

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

| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|-----------------------------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product prep. & packaging | Establishments | 23 | 21 | 26 | 27 | 24 | 22 | 24 | 22 | 30 |
| | Employees | 1,288 | 1,155 | 1,207 | 1,169 | 1,026 | 1,184 | 1,273 | 1,248 | 1,026 |
| | Payroll | 23,842 | 24,302 | 27,813 | 27,045 | 29,006 | 24,961 | 26,425 | 27,737 | 27,638 |
| Seafood sales, wholesale | Establishments | 97 | 92 | 104 | 69 | 75 | 77 | 82 | 71 | 75 |
| | Employees | 1,001 | 897 | 970 | 734 | 683 | 715 | 723 | 603 | 729 |
| | Payroll | 26,408 | 28,586 | 51,597 | 24,498 | 23,650 | 23,879 | 26,356 | 25,309 | 30,370 |
| Seafood sales, retail | Establishments | 59 | 58 | 62 | 60 | 51 | 52 | 50 | 60 | 60 |
| | Employees | 176 | 207 | 189 | 206 | 189 | 199 | 0 | 0 | 331 |
| | Payroll | 3,162 | 3,229 | 3,703 | 3,403 | 3,393 | 3,742 | 4,090 | 6,102 | 6,891 |

Transport, Support & Marine Operations - Employer Establishments (thousands of dollars)^{2,3}

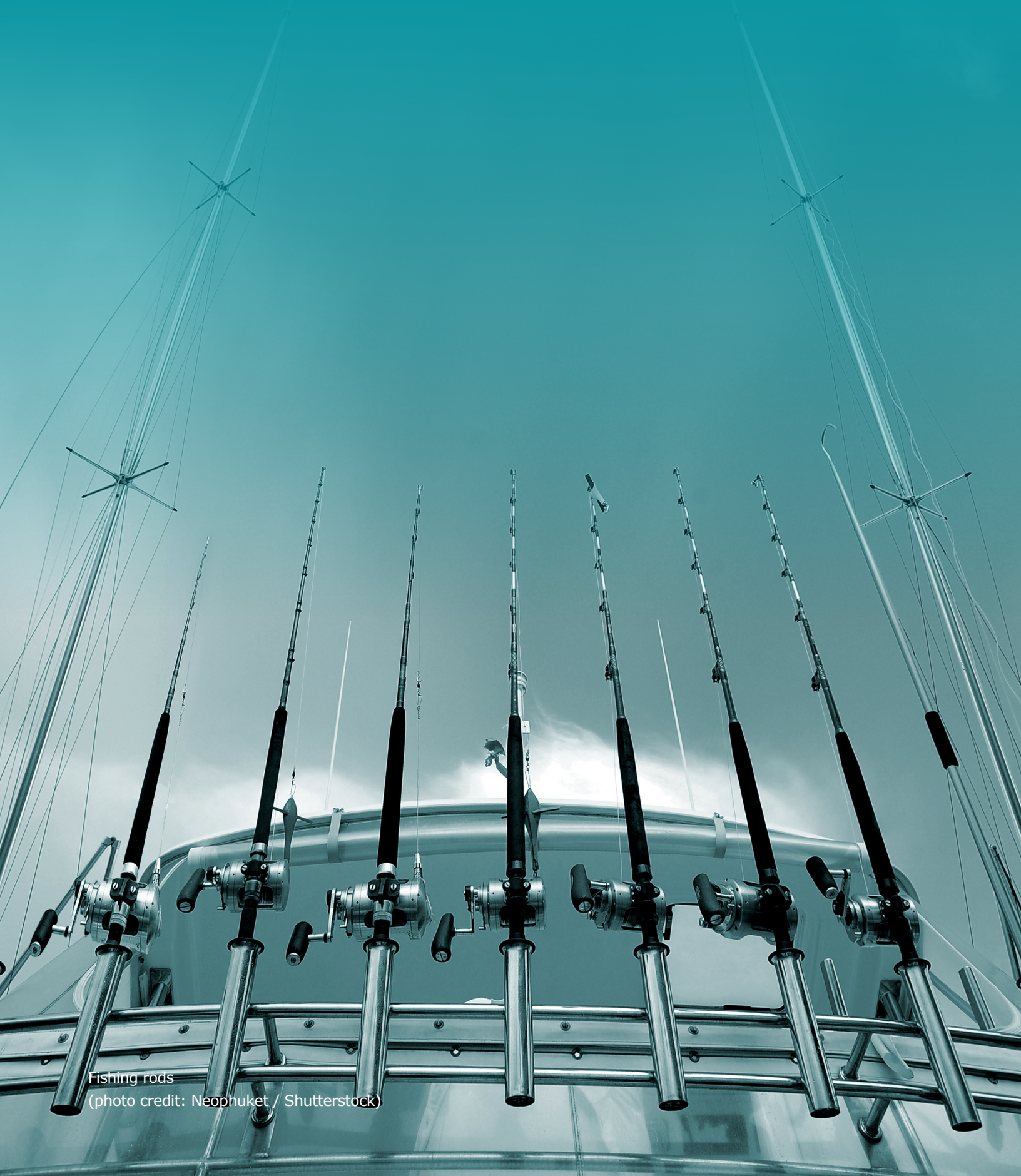
| | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 61 | 45 | 43 | 42 | 43 | 48 | 48 | 39 | 42 |
| | Employees | ds | 2,270 | 2,513 | 2,815 | 2,729 | 1,909 | 1,764 | 1,814 | 2,253 |
| | Payroll | ds | 107,328 | 131,946 | 251,997 | 200,219 | 161,080 | 177,549 | 174,686 | 207,831 |
| Deep sea freight transportation | Establishments | 43 | 40 | 41 | 35 | 36 | 30 | 39 | 40 | 33 |
| | Employees | ds | 751 | 920 | 514 | 802 | 764 | 860 | 742 | ds |
| | Payroll | ds | 41,969 | 49,761 | 40,764 | 61,309 | 63,408 | 71,515 | 65,818 | 44,902 |
| Deep sea passenger transportation | Establishments | 4 | 3 | 4 | 3 | 2 | 1 | 1 | 0 | 2 |
| | Employees | ds | ds | ds | ds | ds | ds | ds | NA | ds |
| | Payroll | ds | ds | ds | ds | ds | ds | ds | NA | ds |
| Marinas | Establishments | 166 | 150 | 141 | 143 | 131 | 148 | 144 | 132 | 124 |
| | Employees | ds | ds | 1,200 | 1,486 | 1,423 | 1,198 | 1,233 | 1,169 | 1,258 |
| | Payroll | ds | ds | 28,359 | 34,039 | 33,803 | 33,968 | 34,928 | 34,711 | 36,461 |
| Marine cargo handling | Establishments | 60 | 64 | 62 | 55 | 57 | 54 | 55 | 42 | 48 |
| | Employees | 5,200 | 5,349 | 6,237 | 6,313 | 6,276 | 5,262 | 5,259 | 4,373 | 6,390 |
| | Payroll | 151,522 | 161,386 | 186,416 | 196,006 | 167,562 | 166,877 | 153,360 | 130,817 | 272,286 |
| Navigational services to shipping | Establishments | 87 | 84 | 90 | 99 | 95 | 87 | 91 | 91 | 89 |
| | Employees | 1,064 | 1,373 | 1,709 | 1,884 | 1,849 | 1,606 | 1,448 | 1,676 | 1,485 |
| | Payroll | 75,914 | 98,244 | 125,061 | 137,962 | 137,289 | 132,283 | 113,444 | 124,500 | 130,572 |
| Port & harbor operations | Establishments | 15 | 16 | 15 | 24 | 30 | 29 | 26 | 37 | 27 |
| | Employees | ds | 112 | 98 | ds | 421 | ds | 439 | 1,381 | 630 |
| | Payroll | ds | 4,992 | 5,163 | 10,538 | 13,778 | 18,627 | 18,842 | 55,470 | 25,229 |
| Ship & boat building | Establishments | 99 | 90 | 96 | 102 | 99 | 97 | 91 | 89 | 87 |
| | Employees | 3,564 | 3,515 | 4,810 | 5,368 | 3,891 | 3,386 | 2,773 | 5,601 | 5,686 |
| | Payroll | 156,259 | 170,308 | 210,275 | 235,190 | 158,261 | 147,492 | 153,077 | 310,230 | 297,248 |

¹ The U.S. Commercial Fishing Location Quotient (CFLQ) is 1. A CFLQ greater than 1 indicates that more commercial fishing occurs in this state than the national average. A CFLQ less than 1 indicates that less commercial fishing occurs in this state than the national average.

² ds = these data are suppressed.

³ NA = not applicable.

Data Sources



Fishing rods
(photo credit: Neophuket / Shutterstock)

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- "Status of U.S. Fisheries." Office of Sustainable Fisheries, National Marine Fisheries Service, National Oceanic & Atmospheric Administration (NOAA Fisheries). http://www.nmfs.noaa.gov/sfa/fisheries_eco/status_of_fisheries/
- "Endangered Species Act (ESA)." Office of Protected Resources, National Marine Fisheries Service, National Oceanic & Atmospheric Administration (NOAA Fisheries). www.nmfs.noaa.gov/pr/laws/esa/
- "Certified Fisheries." Marine Stewardship Council. www.msc.org/
- "Catch Shares." Office of Sustainable Fisheries, National Marine Fisheries Service, National Oceanic & Atmospheric Administration (NOAA Fisheries). http://www.fisheries.noaa.gov/sfa/management/catch_shares/index.html

Fishery Management Councils & Fishery Plans:

- Caribbean Fishery Management Council. www.caribbeanfmc.com
- Gulf of Mexico Fishery Management Council. www.gulfcouncil.org
- Mid-Atlantic Fishery Management Council. <http://www.mafmc.org/>
- New England Fishery Management Council. www.nefmc.org/
- North Pacific Fishery Management Council. <http://www.npfmc.org/>
- Pacific Fishery Management Council. www.pcouncil.org
- South Atlantic Fishery Management Council. www.safmc.net
- Western Pacific Fishery Management Council. www.wpcouncil.org

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- Commercial Landings Database. Obtained November 2, 2014. Office of Science & Technology, National Marine Fisheries Service, National Oceanic & Atmospheric Administration (NOAA Fisheries). www.st.nmfs.noaa.gov/st1/commercial/index.html

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- Alaska Fisheries Science Center, National Marine Fisheries Service, National Oceanic & Atmospheric Administration (NOAA Fisheries). Obtained November 2, 2014. www.afsc.noaa.gov

Economic Impacts of the U.S. Commercial Seafood Industry:

- A User's Guide to the National and Coastal State I/O Model. http://www.st.nmfs.noaa.gov/documents/commercial_seafood_impacts_2007-2009.pdf

Additional information:

- "Data Caveats." Office of Science & Technology, National Marine Fisheries Service, National Oceanic & Atmospheric Administration (NOAA Fisheries). <https://www.st.nmfs.noaa.gov/commercial-fisheries/commercial-landings/data-caveats/index>
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Data for North Pacific Region:

- Alaska Department of Fish & Game. Obtained September 28, 2015. <http://www.adfg.state.ak.us>

Data for Texas (Gulf of Mexico Region):

- Texas Parks & Wildlife Department. Obtained July 20, 2015. www.tpwd.state.tx.us
- Louisiana Department of Wildlife and Fisheries. Obtained July 28, 2015. <http://www.wlf.louisiana.gov/about-la-cree>

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<http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2011>
- Lovell, J. Sabrina, James Hilger, Scott Steinback, and Clifford Hutt. 2016. The Economic Contribution of Marine Angler Expenditures on Durable Goods in the United States, 2014. U.S. Dept. of Commerce. Draft report.
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- "Gross Domestic Product by State." Obtained July 31, 2015. Bureau of Economic Analysis.
<http://www.bea.gov/iTable/iTable.cfm?reqid=70&step=1&isuri=1&acrdn=2#reqid=70&step=1&isuri=1>
- "Location Quotient Calculator." Obtained July 31, 2015. Bureau of Labor Statistics.
data.bls.gov/LOCATION_QUOTIENT/servlet/lqc.ControllerServlet
- "Nonemployer Statistics." Obtained July 31, 2015. U.S. Census Bureau.
<http://www.census.gov/econ/nonemployer/index.html>

Publications



Charter boat, Santa Barbara, California
(photo credit: Sabrina Beyer)

Selected publications by NOAA Fisheries Economics and Social Sciences Program staff are grouped by geographic region of focus and then organized under the following categories:

Climate Change Research
Coastal & Marine Recreation Research
Commercial Fisheries Economics Research
Spatial Analysis & Marine Protected Areas Research
Ocean Policy & Management Research
Other Marine Environmental Research

Recreational Fisheries Economics Research
Habitat Economics Research
Seafood Marketing & Trade Research
Sociocultural Research
U.S. Territories & International Fisheries Research
Protected Resources Economics Research

United States

UNITED STATES | Climate Change Research

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Resources



Bandit reel, South Atlantic
(photo credit: Amber Van Harten)

U.S.

Federal Agencies

- Economics & Social Analysis Division, Office of Science & Technology, NOAA Fisheries
www.st.nmfs.noaa.gov/economics/
- Office of Science & Technology, NOAA Fisheries | <https://www.st.nmfs.noaa.gov/>
- Marine Recreational Information Program
<http://www.st.nmfs.noaa.gov/recreational-fisheries/index>
- Bureau of Oceans and International Environmental and Scientific Affairs, U.S. Department of State
www.state.gov/e/oes/ocns/fish/

NORTH PACIFIC

Federal Agencies

- Economic & Social Sciences Research, Alaska Fisheries Science Center, NOAA Fisheries
<http://www.afsc.noaa.gov/REFM/Socioeconomics/default.php>
- Alaska Fisheries Science Center, NOAA Fisheries | www.afsc.noaa.gov
- Alaska Regional Office, NOAA Fisheries | <https://alaskafisheries.noaa.gov/>
- Alaska Region, U.S. Fish & Wildlife Service | <http://www.fws.gov/alaska/>
- District 17, U.S. Coast Guard | www.uscg.mil/D17

State Agencies

- Alaska Department of Fish & Game | www.adfg.state.ak.us

Councils & Commissions

- North Pacific Fishery Management Council | www.npfmc.org
- Pacific States Marine Fisheries Commission | www.psmfc.org
- Fisheries Economics Data Program Pacific States Marine Fisheries Commission | www.psmfc.org/efin
- International Pacific Halibut Commission | www.iphc.int

PACIFIC

Federal Agencies

- Economics, Groundfish Analysis Program, Northwest Fisheries Science Center, NOAA Fisheries
<http://www.nwfsc.noaa.gov/research/divisions/fram/economic/>
- Human Dimensions Program, Northwest Fisheries Science Center, NOAA Fisheries
www.nwfsc.noaa.gov/research/divisions/cbd/humandim
- Northwest Fisheries Science Center, NOAA Fisheries | www.nwfsc.noaa.gov
- West Coast Regional Office, NOAA Fisheries | www.westcoast.fisheries.noaa.gov
- Socioeconomics Research, Southwest Fisheries Science Center, NOAA Fisheries
<https://swfsc.noaa.gov/textblock.aspx?id=1038&ParentMenuId=109>
- Southwest Fisheries Science Center | <https://swfsc.noaa.gov/>
- Pacific Region, U.S. Fish & Wildlife Service | www.fws.gov/pacific
- California & Nevada, U.S. Fish & Wildlife Service | www.fws.gov/cno
- District 13, U.S. Coast Guard | www.uscg.mil/D13

State Agencies

- California Department of Fish & Game | www.wildlife.ca.gov
- Oregon Department of Fish & Wildlife | www.dfw.state.or.us
- Washington Department of Fish & Wildlife | <http://wdfw.wa.gov/>

Councils & Commissions

- Pacific Fishery Management Council | www.pcouncil.org
- Pacific States Marine Fisheries Commission | www.psmfc.org
- Fisheries Economics Data Program - Pacific States Marine Fisheries Commission | www.psmfc.org/efin
- International Pacific Halibut Commission | www.iphc.int

WESTERN PACIFIC

Federal Agencies

- Socioeconomics & Planning Group, Office of the Director, Pacific Islands Fisheries Science Center, NOAA Fisheries | www.pifsc.noaa.gov/socioeconomics/
- Pacific Islands Fisheries Science Center, NOAA Fisheries | www.pifsc.noaa.gov
- Pacific Islands Regional Office, NOAA Fisheries | www.fpir.noaa.gov
- Pacific Region, U.S. Fish & Wildlife Service | www.fws.gov/pacific
- District 14, U.S. Coast Guard | www.uscg.mil/d14

State Agencies

- Hawai'i Department of Land & Natural Resources | www.hawaii.gov/dlnr
- Guam Office of the Governor | www.guamgovernor.net
- Department of Marine & Wildlife Resources, American Samoa Office of the Governor
- Division of Fish & Wildlife, Commonwealth of the Northern Mariana Islands | <http://www.cnmi-dfw.com/>

Councils & Commissions

- Western Pacific Fishery Management Council | www.wpcouncil.org

NEW ENGLAND

Federal Agencies

- Social Sciences Branch, Northeast Fisheries Science Center, NOAA Fisheries | www.nefsc.noaa.gov/read/socialsci
- Northeast Fisheries Science Center, NOAA Fisheries | www.nefsc.noaa.gov
- Greater Atlantic Regional Fisheries Office, NOAA Fisheries | www.greateratlantic.fisheries.noaa.gov
- Northeast Region, U.S. Fish & Wildlife Service | www.fws.gov/northeast
- District 1, U.S. Coast Guard | www.uscg.mil/D1

State Agencies

- Maine Department of Marine Resources | www.maine.gov/dmr/index.htm
- Rhode Island Department of Environmental Management | www.dem.ri.gov
- Massachusetts Division of Marine Fisheries | www.mass.gov/eea/land-use-habitats/marine-fisheries/
- Connecticut Department of Environmental Protection | www.ct.gov/dep/site/
- New Hampshire Fish & Game Department | www.wildlife.state.nh.us

Councils & Commissions

- New England Fishery Management Council | www.nefmc.org
- Atlantic States Marine Fisheries Commission | www.asmfc.org

MID-ATLANTIC

Federal Agencies

- Social Sciences Branch, Northeast Fisheries Science Center, NOAA Fisheries | www.nefsc.noaa.gov/read/socialsci
- Northeast Fisheries Science Center, NOAA Fisheries | www.nefsc.noaa.gov
- Greater Atlantic Regional Fisheries Office, NOAA Fisheries | www.greateratlantic.fisheries.noaa.gov
- Northeast Region, U.S. Fish & Wildlife Service | www.fws.gov/northeast
- District 5, U.S. Coast Guard | www.uscg.mil/D5

State Agencies

- Bureau of Marine Resources, New York Department of Environmental Conservation
www.dec.ny.gov/about/796.html
- New Jersey Division of Fish & Wildlife | www.state.nj.us/dep/fgw
- Pennsylvania Fish & Boat Commission | <http://fishandboat.com/>
- Delaware Division of Fish & Wildlife | www.fw.delaware.gov
- Fisheries Service, Maryland Department of Natural Resources | www.dnr.state.md.us/fisheries
- Virginia Marine Resources Commission | www.mrc.state.va.us

Councils & Commissions

- Mid-Atlantic Fishery Management Council | www.mafmc.org
- Atlantic States Marine Fisheries Commission | www.asmfc.org

SOUTH ATLANTIC

Federal Agencies

- Social Science Research Group, Southeast Fisheries Science Center, NOAA Fisheries
www.sefsc.noaa.gov/socialscience.jsp
- Southeast Fisheries Science Center, NOAA Fisheries | www.sefsc.noaa.gov
- Southeast Regional Office, NOAA Fisheries | <http://sero.nmfs.noaa.gov/>
- Southeast Region, U.S. Fish & Wildlife Service | www.fws.gov/southeast
- Southwest Region, U.S. Fish & Wildlife Service | www.fws.gov/southwest
- District 7, U.S. Coast Guard | www.uscg.mil/D7

State Agencies

- Division of Marine Fisheries, North Carolina Department of Environment & Natural Resources
<http://portal.ncdenr.org/web/mf/>
- Marine Resources Division, South Carolina Department of Natural Resources | www.dnr.sc.gov
- Coastal Resources Division, Georgia Department of Natural Resources | <http://www.coastalgadnr.org/>
- Florida Fish & Wildlife Conservation Commission | <http://myfwc.com/>

Councils & Commissions

- South Atlantic Fishery Management Council | www.safmc.net
- Atlantic States Marine Fisheries Commission | www.asmfc.org

GULF OF MEXICO

Federal Agencies

- Social Science Research Group, Southeast Fisheries Science Center, NOAA Fisheries
www.sefsc.noaa.gov/socialscience.jsp
- Southeast Fisheries Science Center, NOAA Fisheries | www.sefsc.noaa.gov
- Southeast Regional Office, NOAA Fisheries | <http://sero.nmfs.noaa.gov/>
- Southeast Region, U.S. Fish & Wildlife Service | www.fws.gov/southeast
- Southwest Region, U.S. Fish & Wildlife Service | www.fws.gov/southwest
- District 8, U.S. Coast Guard | www.uscg.mil/D8

State Agencies

- Florida Fish & Wildlife Conservation Commission | <http://myfwc.com/>
- Marine Resources Division, Alabama Department of Conservation & Natural Resources
www.outdooralabama.com
- Mississippi Department of Marine Resources | www.dmr.state.ms.us
- Louisiana Department of Wildlife & Fisheries | <http://www.wlf.louisiana.gov/>
- Texas Parks & Wildlife Department | www.tpwd.state.tx.us

Councils & Commissions

- Gulf of Mexico Fishery Management Council | www.gulfcouncil.org
- Gulf States Marine Fisheries Commission | www.gsmfc.org

PROFESSIONAL ORGANIZATIONS

- North American Association of Fisheries Economists | <http://oregonstate.edu/dept/IIFET/NAAFE/Home.html>
- International Institute of Fisheries Economics & Trade | <http://oregonstate.edu/dept/iifet/>

OTHER ORGANIZATIONS & INFORMATION

- Organisation for Economic Co-operation & Development | <http://www.oecd.org/>
- Fisheries and Aquaculture Department, Food and Agriculture Organization of the United Nations
<http://www.fao.org/fishery/capture/en>
- Marine Stewardship Council | www.msc.org

Glossary



Charter Boat Row, Oregon
(photo credit: Leif Anderson)

Angler¹ – A person catching fish or shellfish with no intent to sell, including people releasing the catch. Also known as a recreational fisherman.

Annual Payroll² – Includes all forms of compensation such as salaries, wages, reported tips, commissions, bonuses, vacation allowances, sick-leave pay, employee contributions to qualified pension plans, and the value of taxable fringe benefits. For corporations, it includes amounts paid to officers and executives; for unincorporated businesses, it does not include profit or other compensation of proprietors or partners. Payroll is reported before deductions for Social Security, income tax, insurance union dues, etc.

Annual Receipts³ – Includes gross receipts, sales, commissions, and income from trades and businesses, as reported on annual business income tax returns. Business income consists of all payments received for services rendered by nonemployer businesses, such as payments received as independent agents and contractors. The composition of nonemployer receipts may differ from receipts data published for employer establishments. For example, for wholesale agents and brokers without payroll (nonemployers), the receipts item contains commissions or earnings. In contrast, for wholesale agents and brokers with payroll (employers), the sales and receipts item published in the Economic Census represents the value of the goods involved in the transactions.

Buyback Program⁴ – A management tool available to fishery managers intended to ease fishing-related pressure on marine resources. Fishing vessels are purchased by the government or by the fishing industry itself. Then they are removed from a specific fishery where fish stocks or stock complexes are considered overfished or subject to overfishing.

Bycatch¹ – Species other than the primary target species that are caught incidental to the harvest of the primary species. Bycatch may be retained or discarded; discards may occur for regulatory or economic reasons.

Catch¹ – 1. To undertake any activity that results in taking fish out of its environment dead or alive, or to bring fish on board a vessel dead or alive; 2. The total number (or weight) of fish caught by fishing operations. Catch should include all fish killed by the act of fishing, not just those landed; 3. The component of fish encountering fishing gear, which is retained by the gear. Catch is usually expressed in terms of wet weight. It refers sometimes to the total amount caught and sometimes only to the amount landed. The fish that are not landed, but returned to the sea, are called discards or bycatch. For this report, recreational catch refers to the total number of individual fish released (thrown back into the sea) and harvested (not thrown back into the sea) by recreational fishermen (anglers).

Catch Share Program⁵ – This is a generic term used to describe a fishery management program that allocates a specific portion of the total fishery catch to individuals, cooperatives, communities or other entities, including sectors. The term encompasses more specific programs defined in legislation such as Limited Access Privilege Programs (LAPPs) and Individual Fishing Quotas (IFQs). Note that a catch share allocated to a sector is different from a general sectoral allocation or distribution to an entire segment of a fishery (such as a recreational sector allocation or a longline gear sector allocation). The two differ because the recipient of the catch share is responsible for terminating fishing activity when their specific share is reached.

Coastal County⁶ – A coastal county meets one of the following criteria: 1) at least 15 percent of a county's total land area is located within the nation's coastal watershed; 2) a portion of or an entire county accounts for at least 15 percent of a coastal cataloging unit. Any U.S. county that meets these criteria is classified as coastal.

Coastal County Angler – For this report, a coastal county angler refers to a recreational fishermen who lives within a given state and within a coastal county of that state.

Commercial Fishing Location Quotient (CFLQ)⁷ – For this report, the CFLQ is calculated as the ratio of a state’s distribution of employment in commercial fishing industries compared with the distribution of commercial fishing industries in the U.S. The CFLQ is calculated using the “Location Quotient Calculator” provided by the Bureau of Labor Statistics, U.S. Department of Labor.

Community Development Quota Program (CDQ)¹ – A program in western Alaska under which a percentage of the total allowable catch (TAC) of Bering Sea commercial fisheries is allocated to specific communities. Communities eligible for this program must be located within 50 miles of the Bering Sea coast or on an island within the Bering Sea; meet criteria established by the State of Alaska; be a village certified by the Secretary of the Interior pursuant to the Alaska Native Claims Settlement Act; and consist of residents who conduct more than half of their current commercial or subsistence fishing in the Bering Sea or waters surrounding the Aleutian Islands. Currently 7.5 percent of the TAC in the pollock, halibut, sablefish, crab and groundfish fisheries is allocated to the CDQ Program.

Dedicated Access Privileges (DAPs)⁸ – As defined by the U.S. Commission on Ocean Policy, a DAP program assigns an individual or other entity access to a pre-determined portion of the annual catch in a particular fishery. In some cases, the privilege is transferable and may be bought and sold, creating a market. The term encompasses a range of tools, including access privileges assigned to individuals (that is, individual transferable quotas), and to groups or communities (for example, community development quotas, cooperatives, and area-based quotas). DAP programs are sometimes known as rights-based management, and are of 10 synonymous with Limited Access Privilege Programs (see “Limited Access Privilege Program”). However, “rights-based management” implies granting an individual the “right” to fish. With the exception of certain tribes, U.S. fishermen do not have inalienable rights to fish because the fishery resources of the U.S. belong to all people of the U.S. Under current law, fishermen are granted a “privilege” to fish, subject to certain conditions.

Discards¹ – To release or return a fish or other species to the sea, dead or alive, whether or not such fish or other species are brought fully on board a fishing vessel. Estimates of discards can be made in a variety of ways, including samples from observers and logbook records. Fish (or parts of fish) can be discarded for a variety of reasons such as having physical damage, being a non-target species for the trip, and compliance with management regulations like minimum size limits or quotas.

Durable Equipment Expenditures or Durable Goods Expenditures⁹ – For this report, this term refers to expenses related to equipment used for recreational fishing activities. These expenses include the purchase of semi-durable goods (tackle, rods, reels, line, etc.); durable goods (motor boats and accessories, non-motorized boats, boating electronics, mooring, boat storage, boat insurance, and vehicles or homes); and angling accessories and multi-purpose items (magazines, club dues, saltwater angling-specific clothing, and camping gear).

Ecolabel or Ecolabelling Scheme¹⁰ – In fisheries, ecolabelling schemes entitle a fishery product to bear a distinctive logo or statement that certifies that the fish has been harvested in compliance with specified conservation and sustainability standards. The logo or statement is intended to facilitate informed decisions by purchasers whose choices may promote and stimulate the sustainable use of fishery resources.

Economic Impact Model^{11,12} – Economic impact models capture how sales in a sector generate economic impacts directly in the sector in which the sale was made. The sales then ripple throughout the state and national economies as each dollar spent generates additional sales by other firms and consumers. The NOAA Fisheries Commercial Fishing & Seafood Industry Input/Output Model uses an IMPLAN platform to estimate the economic impacts associated with the harvesting of fish by U.S. commercial fishermen and other major components of the U.S. seafood industry. As used here, the term fish refers to the entire range of finfish, shellfish and other life (that is, sea urchins, seaweed, kelp and worms) from marine and freshwaters that are included in the landings data maintained by the National Marine Fisheries Service. The NOAA Fisheries Recreational Economic Impact Model, which also uses an IMPLAN platform, estimates the economic impacts generated by expenditures made by saltwater anglers.

Economic Impacts^{11,12} – For this report, the economic impacts of the commercial fishing sector and seafood industry refer to the employment (full-time and part-time jobs), personal income, and output (sales by U.S. businesses) generated by the commercial harvest sector and other major components of the U.S. seafood industry. These components include processors and dealers, wholesalers and distributors, grocers, and restaurants. Economic impacts of recreational fishing activities refer to the amount of sales generated, the number of jobs supported, and the contribution to gross domestic product (GDP) by state (also known as value-added impacts) from expenditures related to recreational fishing.

Effort¹ – For this report, effort refers to the number of fishing trips taken by recreational fishermen (anglers). The term can also refer to the amount of time and fishing power used to harvest fish in commercial fisheries, including gear size, boat size and horsepower.

Employee Compensation¹³ – This is related to Gross Domestic Product (GDP) by State and is an estimate of the sum of employee wages and salaries and supplements to wages and salaries. Wages and salaries are measured on an accrual, or “when earned” basis, which may be different from the measure of wages and salaries measured on a disbursement, or “when paid” basis. Wages and salaries and supplements of Federal military and civilian government employees stationed abroad are excluded from the measure of GDP by state.

Employer Establishments¹⁴ – Businesses with payroll and paid employees with a single physical location at which business is conducted or services or industrial operations are performed. An employee establishment is not necessarily identical to a company or enterprise, which may consist of one or more establishments. When two or more activities are carried on at a single location under a single ownership, all activities generally are grouped together as a single establishment. The entire establishment is classified on the basis of its major activity, and all data are included in that classification.

Endangered Species¹⁵ – As defined by the Endangered Species Act (ESA), an endangered species is any species which is in danger of extinction throughout all or a significant portion of its range. See also “Threatened Species.”

Endangered Species Act (ESA)¹⁵ – The ESA was signed on December 28, 1973, and provides for the conservation of species that are endangered or threatened throughout all or a significant portion of their range, and the conservation of the ecosystems on which they depend. The ESA replaced the Endangered Species Conservation Act of 1969. Congress has amended the ESA several times.

Expenditures⁹ – For this report, expenditures are related to recreational fishing activities and described as being one of two types: 1) expenditures related to a specific fishing trip; or 2) durable equipment expenditures.

Ex-Vessel¹⁰ – Refers to activities that occur when a commercial fishing boat lands or unloads a catch. For example, the price for the catch that a captain receives at the point of landing is an ex-vessel price.

Exclusive Economic Zone (EEZ)¹ – The EEZ is the area that extends 200 nautical miles from the seaward boundaries of the coastal states. The seaward boundary for most states is 3 nautical miles with the exceptions of Texas, Puerto Rico and the Gulf Coast of Florida, which is 9 nautical miles. The U.S. claims and exercises sovereign rights and exclusive fishery management authority over all fish and continental shelf resources through this 200-nautical-mile boundary.

Fish Stock¹ – A fish stock refers to the living resources in the community or population from which catches are taken in a fishery. The term “fish stock” usually implies that the particular population is more or less isolated from other stocks of the same species and hence self-sustaining. In a particular fishery, the fish stock may be one or several species of fish. Here, it also includes commercial invertebrates and plants.

Fishery Management Council (FMC) or Regional Fishery Management Council⁴ – A regional fisheries management body established by the Magnuson-Stevens Act to manage fishery resources in eight designated regions of the United States.

Fishery Management Plan (FMP)⁴ – 1. A document prepared under supervision of the appropriate fishery management council (FMC) for management of stocks of fish judged to require management. The plan must generally be formally approved. An FMP includes data, analyses and management measures; 2. A plan containing conservation and management measures for fishery resources, and other provisions required by the Magnuson-Stevens Act, developed by fishery management councils or the Secretary of Commerce.

Fishing Cooperatives⁴ – A market-based fisheries management tool where access to fisheries resources is limited to a specific group of fishermen. See also “Catch Share Program.”

Fishing Day – For this report, a fishing day refers to a partial or full day spent in recreational fishing and can be different from a fishing trip. For example, one fishing trip can consist of more than 1 fishing day. This term is used in the Alaska recreational fishing tables.

Fishing Effort¹⁰ – The amount of fishing gear of a specific type used on the fishing grounds over a given unit of time. For example, hours trawled per day, number of hooks set per day, or number of hauls of a beach seine per day. When two or more kinds of gear are used, the respective efforts must be adjusted to some standard type before being added. For recreational fishing activities, fishing effort refers to the number of participants (that is, recreational fishermen or anglers) who engage in recreational fishing activities.

Fishing Mode – For this report, fishing mode refers to the type of recreational fishing a recreational fisherman (angler) engages in, such as fishing from shore, a private or rental boat, or a for-hire boat.

Fishing Trip – For this report, a fishing trip refers to a recreational fishing excursion and can be different from a fishing day. For example, one fishing trip can consist of more than 1 fishing day. Fishing trips are classified as occurring in one of three fishing modes: 1) a shore-based fishing trip; 2) by a private or rental boat; or 3) on a for-hire fishing boat.

For-Hire Mode – For this report, this fishing mode refers to trips taken by a recreational fishermen (angler) on a party (also referred to as a headboat) or charter boat.

Gross Domestic Product (GDP) by State or Gross State Product (GSP)¹³ – Previously known as the Gross State Product, the GDP by state is the value added in production by the labor and capital located in a state. GDP for a state is derived as the sum of the GDP originating in all industries in the state.

Harvest¹ – The total number of weight or fish caught and kept from an area over a period of time. Note that landings, catch and harvest are different. For recreational fishing activities, harvest refers to the number of individual fish not thrown back into the sea by a recreational fisherman (angler). However, in Hawai'i and the Gulf states, harvest includes fish thrown back dead. See also "Catch" and "Release."

Individual Fishing Quota (IFQ)¹ – A type of limited entry; an allocation to an individual (a person or a legal entity, for example, a vessel owner or company) of a right (privilege) to harvest a certain amount of fish in a certain period of time. It is also expressed as an individual share of an aggregate quota, or total allowable catch (TAC). See also "Individual Transferable Quota" and "Catch Share Program."

Individual Transferable Quota (ITQ)¹ – A type of individual fishing quota (IFQ) allocated to individual fishermen or vessel owners that can be transferred (sold or leased) to others. See also "Individual Fishing Quota."

Industry Sector – For this report, fishing- and marine-related industries were combined into industry sectors. Two industry sectors were included in this report: 1) seafood sales and processing; and 2) transport, support and marine operations. Fishing and marine-related industries were chosen from the County Business Patterns Data Series based on data availability and perceived relevance to fishing or marine activities. These industries were then combined into one of these two industry sectors.

Key Species or Species Groups – For this report, up to 10 species or species groups were chosen as "key" species or species groups due to their regional importance to commercial and recreational fisheries. The regional importance of these key species or species groups was chosen based on their economic and/or historical significance to a state or region.

Landings¹ – 1. The number or poundage of fish unloaded by commercial fishermen or brought to shore by recreational fishermen for personal use. Landings are reported at the locations at which fish are brought to shore; 2. The part of the catch that is selected and kept during the sorting procedures on board vessels and successively discharged at dockside.

Limited Access Privilege Program (LAPP) or Limited Access Privilege System⁴ – As defined in the Magnuson-Stevens Act, LAPPs limit participation in a fishery to those satisfying certain eligibility criteria or requirements contained in a fishery management plan (FMP) or associated regulation. A limited access privilege is a federal permit, issued as part of a limited access system, to harvest a quantity of fish expressed by a unit or units representing a portion of the total allowable catch (TAC) of the fishery that may be received or held for exclusive use by a person. A LAPP includes an individual fishing quota (IFQ) or individual tradable quota (ITQ) but does not include community development quotas (CDQs). LAPPs are sometimes known as Dedicated Access Privileges (DAPs). However, unlike LAPPs, DAPs generally encompass CDQs as well as IFQs (see "Dedicated Access Privileges"). LAPPs are a type of catch share program. See also "Catch Share Program."

License Limitation Program or Limited Entry Program¹ – A management tool available to fishery managers where the number of commercial fishermen or vessels licensed to participate in a fishery is legally restricted. A management agency of 10 uses this management tool to limit entry into a fishery.

Limited Entry Program – Also known as a license limitation program; see "License Limitation Program."

Location Quotient⁷ – Location Quotients (LQs) are ratios that allow an area’s distribution of employment by industry to be compared to a reference or base area’s distribution. The reference area is usually the U.S., but it can also be a state or a metropolitan area. The reference or base industry is usually the all-industry total. The following discussion assumes the defaults are used. LQs also allow areas to be easily compared with each other. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than in the reference area.

For example (assuming the U.S. as the reference area), Las Vegas will have an LQ greater than 1 in the Leisure and Hospitality industry, because this industry makes up a larger share of the Las Vegas employment total than it does for the country as a whole. LQs are calculated by first dividing local industry employment by the all-industry total of local employment. Next, reference area industry employment is divided by the all-industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

Magnuson-Stevens Fishery Conservation and Management Act or Magnuson-Stevens Act (MSA)¹

Federal legislation responsible for establishing the Regional Fishery Management Councils (FMCs) and the mandatory and discretionary guidelines for federal fishery management plans (FMPs). This legislation was originally enacted in 1976 as the Fishery Management and Conservation Act. Its name was changed to the Magnuson Fishery Conservation and Management Act in 1980, and in 1996 it was renamed the Magnuson-Stevens Fishery Conservation and Management Act.

Market-based Management⁴ – Market-based management is an umbrella term that encompasses approaches that provide economic incentives to protect fisheries from overharvest. These approaches contrast with conventional fisheries management approaches, such as buyback programs and license limitation programs (see “Buyback Program” and “License Limitation Program”). One example of a market-based management approach for fisheries is a limited access privilege program (LAPP; see “Limited Access Privilege Program”) that includes an individual fishing quota. A LAPP provides individual fishermen an exclusive, market-based share of a harvest quota or total allowable catch (TAC) of a fishery.

Marine Coastal County – For this report, a marine coastal county is a coastal county that is adjacent to an ocean coastline. See also “Coastal County.”

Marine Economy – For this report, the marine economy refers to the economic activity generated by fishing- and marine-related industries located in a coastal state. Fishing- and marine-related industries were chosen from industries defined in the County Business Patterns Data Series provided by the U.S. Census Bureau. Industries listed in this report were chosen based on that industry’s direct contribution to fishing and marine activities, and whether data was available for that industry. Information such as the number of establishments, number of employees, and annual payroll for these fishing and marine-related industries was used to determine their relative levels of economic activity in a state. These industries were categorized into one of two industry sectors: 1) seafood sales and processing; and 2) transport, support and marine operations. See also “Industry Sector.”

Non-Coastal County Angler – For this report, a non-coastal county angler refers to a recreational fisherman who lives within a given state but not in a coastal county of that state.

Nonemployer Firms³ – A nonemployer business is one that has no paid employees, has annual business receipts of \$1,000 or more (\$1 or more in the construction industries), and is subject to federal income taxes. Most nonemployers are self-employed individuals operating very small unincorporated businesses that may or may not be the owner’s principal source of income.

Non-Resident – For this report, a non-resident in the U.S. table refers to a recreational fisherman (angler) who resides outside the U.S.; a non-resident in the regional and state tables refers to an angler who did not reside in the state where they fished.

Out-of-state Angler – For this report, an out-of-state angler is a recreational fisherman (angler) who does not reside within a given coastal state.

Overcapacity¹⁶ – When the harvesting capability within a given fishery exceeds the level of harvest allowed for that fishery.

Overcapitalization¹⁰ – When the amount of harvesting capacity in a fishery exceeds the amount needed to harvest the desired amount of fish at least cost.

Overfished¹ – 1. An overfished stock or stock complex “whose size is sufficiently small that a change in management practices is required to achieve an appropriate level and rate of rebuilding.” A stock or stock complex is considered overfished when its population size falls below the minimum stock size threshold (MSST). A rebuilding plan is required for stocks that are deemed overfished; 2. A stock is considered overfished when exploited beyond an explicit limit past which its abundance is considered “too low” to ensure safe reproduction. In many fisheries, the term is used when biomass has been estimated to be below a biological reference point that is used as the signpost defining an “overfished condition.”

Overfishing¹ – 1. According to the National Standard Guidelines, “overfishing occurs whenever a stock or stock complex is subjected to a rate or level of fishing mortality that jeopardizes the capacity of a stock or stock complex to produce maximum sustainable yield (MSY) on a continuing basis.” Overfishing is occurring if the maximum fishing mortality threshold (MFMT) is exceeded for 1 year or more; 2. In general, the action of exerting fishing pressure (fishing intensity) beyond the agreed optimum level. A reduction of fishing pressure would, in the medium term, lead to an increase in the total catch.

Protected Species¹⁷ – Refers to any species that is protected by either the Endangered Species Act (ESA) or the Marine Mammal Protection Act (MMPA), and that is under the jurisdiction of NOAA Fisheries. This total includes all threatened, endangered and candidate species, as well as all cetaceans and pinnipeds, excluding walruses.

Regional Fishery Management Council or Fishery Management Council (FMC)⁴ – The Magnuson-Stevens Act established eight Regional FMCs around the United States. Each council consists of voting and non-voting members who represent various federal, state and tribal government; fishing industry groups (commercial and/or recreational); and non-fishing groups (such as environmental organizations and academic institutions). Each council is tasked with creating fishery management plans for important fisheries within their regions.

Release – For this report, release refers to the number of individual fish caught by a recreational fisherman (angler) that are then returned to the sea (dead or alive). In Hawai‘i and the Atlantic and Gulf states, release does not include fish returned to the sea that are dead. See also “Catch” and “Harvest.”

Resident – For this report, a resident in the U.S. table refers to a recreational fisherman (angler) who resides inside the U.S.; a resident in the regional and state tables refers to an angler who resides in the state where they fished.

Sector Allocation Program¹⁷ – A fisheries management tool where a group of fishermen are allocated a quota or share of a total allowable catch (TAC), in accordance with an approved plan. This program is considered a type of catch share program. See also “Catch Share Program.”

Species¹ – A group of animals or plants having common characteristics that are able to breed together to produce fertile (capable of reproducing) offspring and maintain their “separateness” from other groups.

Species Group¹ – Group of species considered together of 10 because they are difficult to differentiate without detailed examination (very similar species), or because data for the separate species are not available (for example, in fishery statistics or commercial categories).

Threatened Species¹³ – As defined by the Endangered Species Act (ESA), a threatened species is any species that is likely to become an endangered species within the foreseeable future throughout all or a significant portion of its range. See also “Endangered Species.”

Trip Expenditures – For this report, trip expenditures refer to expenses incurred by recreational fishermen (anglers) on a fishing trip. Trip expenditures are described for residents (individuals who reside in a coastal or non-coastal county within a given state; a U.S. resident) and non-residents (individuals who do not reside within the U.S.).

Value-Added¹ – A firm’s sales minus the cost of the goods and services it purchases from other industries to produce its outputs.

GLOSSARY NOTES

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³ “Nonemployer Definitions.” Nonemployer Statistics, U.S. Census Bureau, U.S. Department of Commerce. Available at: <http://www.census.gov/epcd/nonemployer/view/define.html/> [accessed September 19, 2014].

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¹² Pages 11-12 in: “The Economic Contribution of Marine Angler Expenditures in the United States, 2006.” November 2008. B. Gentner and S. Steinback. National Marine Fisheries Service (NOAA Fisheries), National Oceanic & Atmospheric Administration, U.S. Dept. of Commerce. NOAA Technical Memorandum NMFS-F/SPO-94, 301p. Available at: <http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2006> [accessed September 19, 2014].

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