Management Context

The South Atlantic Region is comprised of North Carolina, South Carolina, Georgia and East Florida. Federal fisheries in this region are managed by the South Atlantic Fishery Management Council (SAFMC) and NOAA Fisheries (NMFS) under eight fishery management plans (FMPs).[1] The spiny lobster and coastal migratory pelagic resources fisheries are managed with the Gulf of Mexico Fishery Management Council (GMFMC). The Dolphin Wahoo FMP is managed with the Mid-Atlantic Fishery Management Council (MAFMC) and the New England Fishery Management Council (NEFMC).

South Atlantic Fishery Management Plans

1. Coastal Migratory Pelagic Resources (with GMFMC)
2. Coral, Coral Reef, and Live/Hardbottom Habitat Plan
3. Dolphin Wahoo (with MAFMC and NEFMC)
4. Golden Crab
5. Pelagic Sargassum Habitat
6. Shrimp
7. Snapper Grouper
8. Spiny Lobster (with GMFMC)

Of the species or species groups covered in these fishery management plans, pink shrimp, snowy grouper, black sea bass, red porgy, and red snapper are currently considered overfished. For short-lived species such as pink shrimp, environmental conditions are generally believed to have a more significant effect than from fishing. Species or species groups currently subject to overfishing are: vermilion snapper, red snapper, snowy grouper, tilefish, red grouper, black sea bass, gag, black grouper, speckled hind, and warsaw grouper. The South Atlantic Council recently has developed or is developing amendments to eliminate overfishing for these species.

The South Atlantic wreckfish fishery is managed as an individual fishing quota (IFQ) fishery. This limited access privilege program (LAPP) is a type of catch share program and was put into place in 1992. The fishery had an ex-vessel value of $300,000 in 2007.

Commercial Fisheries

Commercial fishermen in the South Atlantic harvested 116 million pounds of finfish and shellfish in 2008, earning over $164 million for their catch. Shrimp and blue crab were a major source of ex-vessel revenue in 2008, generating a combined $92 million and 59% of total catch. These species also contributed the most to total landings in the region, with 44 million pounds of blue crab and 23 million pounds of shrimp landed in 2008. High value species, clams and oysters accounted for less than 2% of total landings in 2008, but generated 5% of total revenue that year due to their high ex-vessel price per pound ($6.23 and $4.70, respectively).

North Carolina contributed most to the ex-vessel revenue and landings in the region, with $87 million earned for 71 million pounds landed in 2008. East Florida ($47.6 million, 26 million pounds), South Carolina ($17.5 million, 10 million pounds), and Georgia ($12.5 million, 8.6 million pounds) followed.

Economic Impacts[2]

Florida led the region in terms of sales, income, and job impacts related to the seafood industry in 2008. In-state sales in Florida generated almost $5.7 billion in 2008 with income impacts totaling $3.1 billion. Over 108,000 full- and part-time jobs were generated from the seafood industry in this state. North Carolina ranked second in the South Atlantic in terms of economic impacts with $636 million in in-state sales, $340 million in income impacts, and 15,000 full- and part-time jobs. In terms of employment, Georgia (11,600 jobs) and South Carolina (1,900 jobs) followed.

Key South Atlantic Commercial Species

- Clams
- Blue crab
- Flounders
- Groupers
- King mackerel
- Oysters
- Shrimp
- Snappers
- Swordfish
- Tunas

Landings Revenue

Ex-vessel revenue for finfish and shellfish totaled $164 million in 2008, a 20% decrease (36% in real terms) from landings revenue in 1999 ($204 million) but a 8% increase (2.4% decrease in real terms) from 2007 ($152 million). Shellfish revenue accounted for 63% of total revenue in the South Atlantic, bringing in $104 million in 2008. This was a 29% decrease (43% in real terms) relative to 1999 ($146 million) but a 15% increase (3.5% in real terms) from 2007 ($89 million). Finfish revenue totaled $60 million, a 2% increase (18% decrease in real terms) from 1999, and a 1.5% decrease (11% in real terms) from 2007.

Fishermen in North Carolina accounted for 53% of the region's landings revenue in 2008. This was a 13% decrease (30% in real terms) relative to total revenue in 1999 ($99 million) but a 5% increase relative to 2007 ($82 million). Blue crab ($27.6 million), shrimp ($19 million), and flounders ($10.9 million) contributed the most to total revenue in North Carolina. Georgia (46%), South Carolina (45%), and East Florida (5.5%) experienced declining revenue trends from 1999 to 2008. East Florida (11%, 0.54% in real terms) and Georgia (13%, 2.5% in real terms) both experienced increases in total real revenue from 2007 to 2008.

Of the key species and species groups, revenue from shrimp and blue crab was the highest of the key species and species groups in 2008, contributing 55% to total revenue in the South Atlantic. This was true despite declining revenue trends over the 10 year time period. Shrimp landings revenue declined 37% (50% in real terms) and blue crab declined 18% (34% in real terms) relative to 1999 landings revenue for these species. However, both species experienced an increase in revenue

[1]The authority to manage red drum was transferred to the Atlantic States Marine Fisheries Commission (ASMFC) in 2008.

[2]Economic impacts reported here are for the state of Florida, not East Florida.

from 2007 to 2008: 16% for shrimp (4.7% in real terms) and 19% for blue crab (7.5% in real terms).

Across the South Atlantic, species or groups of species experiencing revenue declines from 1999 to 2008 include clams (52%, 61% in real terms) and swordfish (35% decrease, 48% in real terms). In contrast to these declines, tuna revenue increased 132% increase (86% in real terms), oyster revenue increased 96% (57% in real terms), and snapper revenue increased 59% (27% in real terms). For 2007-2088, tuna revenue decreased 5% (14% in real terms).

At the state level, large changes in landings revenue over the 10 year period occurred for snappers (127% increase), king mackerel (88% increase), Spanish mackerel (86% increase) and clams (66% decrease) in **East Florida**; clams (227% increase), snails or conchs (99% decrease), blue crab (59% increase) and shrimp (60% decrease) in **Georgia**; tunas (179% increase), snappers (67% increase), clams (36% decrease), groupers (39% increase) and blue crab (27% decrease) in **North Carolina**; and oysters (71% increase), grouper (65% decrease), swordfish (82% decrease), tilefish (75% decrease), and clams (81% decrease) in **South Carolina**.

Landings

Across the South Atlantic, commercial fishermen harvested 116 million pounds of finfish and shellfish in 2008. This was a 46% decrease from 1999 (216 million pounds) and a 10% increase from 2007 (105 million pounds). Shellfish accounted for 62% of total landings (72 million pounds) in 2008. However, this was a 35% decrease from 1999 harvest levels (110 million pounds) and a 23% increase from 2007 (59 million pounds). Finfish harvest decreased 58% from 105 million pounds in 1999 to 44 million pounds in 2008. From 2007 to 2008, finfish landings declined 6.1%.

Finfish and shellfish landings experienced double digit declines in all four South Atlantic states between 1999 and 2008. The largest changes were in North Carolina where finfish landings decreased 68% and shellfish landings decreased 36%. Finfish and shellfish landings decreased as follows: 39% and 48%, respectively, in South Carolina; 71% and 27% in Georgia; and 9% and 23% in East Florida.

Blue crab and shrimp were a major component to landings totals across the South Atlantic. In 2008, 45 million pounds of blue crab and 23 million pounds of shrimp were harvested. These species accounted for 59% of the total harvest in 2008. Fishermen in North Carolina landed 73% of blue crabs harvested across the region. However, blue crab harvests declined 38% from 1999 to 2008. North Carolina and East Florida fishermen harvested 74% of total shrimp landings in 2008, harvesting 9.4 million and 7.6 million pounds, respectively. Relative to 1999 landings totals, this was a 5% increase in North Carolina and a 9% decrease in East Florida.

Other South Atlantic key species and groups with large changes in landings totals over the 10 year period include: a 63% increase in oysters, a 36% increase in king mackerel, a 43% decrease in clams, and a 42% decrease in swordfish.

At the state level, dramatic changes in landings totals occurred for the following key species or groups: a 66% increase in snappers, 61% increase in king mackerel, and a 70% decrease in clams in **East Florida**; a 160% increase in clams, 56% decrease in shrimp, and a 99% decrease in snails or conchs in **Georgia**; a 43% decrease in blue crab, and Atlantic croaker and a 36% increase in snappers in **North Carolina**; and a 82% decrease in both tilefish and in swordfish, a 62% decrease in shrimp, and a 64% decrease in clams in **South Carolina**.

Commercial Fish Facts

Landings revenue
- On average, the South Atlantic's key species and species groups accounted for 81% of total landings revenue.
- Shrimp and blue crab contributed the most to total revenue from 1999 to 2008, averaging $52 million and $40 million, respectively. Fishermen in North Carolina generated most of this revenue.
- The largest annual increase in revenue was 109% for tunas, which increased from $2.0 million to $4.2 million from 1999-2000. The largest annual decrease was a 37% decrease in shrimp revenue (2000-2001).

Landings
- The South Atlantic's key species and groups contributed an average of 73% to total landings annually.
- Blue crab and shrimp contributed the most to total landings in the region, averaging 47 million pounds and 25 million pounds from 1999 to 2008. North Carolina fishermen harvested the majority of these species.
- Landings of tunas increased 50% from 2005-2006, the largest annual increase. Most of these landings were harvested in North Carolina. The largest annual decrease in landings was for shrimp which decreased 39% from 2004-2005.

Prices
- Clams ($6.55) and oysters ($4.27) had the highest average ex-vessel price per pound from 1999 to 2008.
- Blue crab ($0.87) and king mackerel ($1.68) had the lowest average ex-vessel price of the region's key species or groups.
- Swordfish had the largest annual increase in ex-vessel price, increasing 52% from 1999-2000. This was followed by a 20% decrease from 2000-2001, the largest annual decrease.

Prices

The ex-vessel prices for the South Atlantic's key species and species groups in 2008 were higher than their 10 year average price per pound for all but two species groups. Ex-vessel prices for clam decreased 15.7% (33% in real terms) and shrimp prices decreased 13% (30% in real terms) between 1999 and 2008. Tuna prices had the largest increase of any key species or group during this period, increasing 120% (76% in real terms) from $1.28 per pound ($1.37, in real terms) to $2.82 per pound ($2.41 in real terms).

Across the region and at the state level, only clam and shrimp prices declined between 1999 and 2008. The largest decreases in clam prices were in South Carolina (48%, 58% in real terms) and North Carolina (6.6%, 25%

in real terms). The largest decreases in shrimp prices were 15% (32% in real terms) in North Carolina.

Half the South Atlantic's key species and species groups decreased in current ex-vessel price between 2007 and 2008. The price of tuna was the only real price to increase between 2007 and 2008. Tuna prices increased (33%, 20% in real terms), shrimp (6%, 4.4% decrease in real terms), snappers (3.8%, 6.3% decrease in real terms) and clams (1%, 8.8% decrease in real terms). Blue crab prices decreased the most (10.1%, 19% decrease in real terms) followed by flounders (8.8%, 18% decrease in real terms), swordfish (7.6%, 17% decrease in real terms) and king mackerel (3.8%, 13% decrease in real terms). The current price of groupers did not change but the real price decreased 9.7%.

The largest increases during the 1999-2008 time period were for tunas (191%, 133% in real terms) and Atlantic croaker (74%, 39% in real terms) in North Carolina; snail or conches (89%, 51% in real terms) in Georgia; groupers (64%, 23% in real terms) in South Carolina; and lobsters (53%, 22% in real terms) in East Florida.

Recreational Fishing

In 2008, there were 2.9 million recreational anglers who took 22 million fishing trips in the South Atlantic. Over 80% of these anglers were residents of a regional coastal county. Of the total fishing trips taken, 50% of them were taken from a private or rental boat and another 48% were shore-based. Atlantic croaker and spot were the most caught key species or species group with 10 million fish. The Atlantic croaker accounted for 27.8% of the total fish caught in the region. Over half of these fish (59%) were harvested rather than released.

Economic Impacts and Expenditures

In 2008, recreational fishing activities in East Florida supported more jobs than in any other state in the South Atlantic with approximately 35,000 full- and part-time jobs supported. This number of jobs was just over half of that reported in 2007 for East Florida. North Carolina (22,000 jobs), South Carolina (5,500 jobs), and Georgia (2,500 jobs) followed in terms of employment impacts from recreational fishing activities. The majority of these jobs were related to durable equipment expenditures (versus trip-related expenditures): 93% of jobs in Georgia; 87% of jobs in East Florida; 52% of jobs in South Carolina; and 49% of jobs in North Carolina.

Industries that provided services for shore-based fishing trips supported most of the trip-related full- and part-time jobs in North Carolina (8,420 jobs) and South Carolina (1,490 jobs). Private or rental boat trips supported most of the trip-related jobs in East Florida (2,570 jobs) and Georgia (100 jobs).

In addition to jobs, the contribution of recreational fishing activities to the South Atlantic's economy can be measured in terms of sales impacts and the contribution of these activities to gross domestic product (value-added impacts). In 2008, sales and value-added impacts were highest in East Florida ($4 billion in sales impacts and $2.1 billion in value-added impacts). North Carolina ($2.3 billion in sales impacts and $1.1 billion), South Carolina ($488 million and $266 million); and Georgia ($311 million and $162 million) followed.

Key South Atlantic Recreational Species

- Bluefish
- Dolphinfish
- Drum (Atlantic croaker and spot)
- Red drum
- Drum (spotted seatrout)
- King mackerel
- Spanish mackerel
- Porgies (sheepshead)
- Black sea bass
- Sharks

The majority of these sales and value-added impacts were supported by expenditures on durable equipment. Shore-based fishing trips generated most of the economic impacts in terms of sales and value-added impacts in North Carolina and South Carolina. In East Florida and Georgia, private or rental boat fishing trips contributed more to trip-related economic impacts than shore-based or for-hire fishing modes.

Across the South Atlantic Region, total fishing trip and durable equipment expenditures totaled approximately $7.48 billion in 2008. Approximately 83% of this was related to durable equipment purchases. Boat-related expenses ($2.57 billion), vehicle ($1.6 billion) and fishing tackle expenses ($1.3 billion) accounted for the majority of these durable equipment expenditures.

Fishing trip-related expenditures by South Atlantic resident and non-resident anglers totaled $596 million and $695 million, respectively. Most of the expenditures by resident anglers was related to private or rental boat fishing trips ($330 million). Non-resident anglers spent most of their trip-related expenditures towards shore-based fishing trips ($496 million).

Participation

The 2.9 million recreational fishermen who fished in the South Atlantic in 2008 was a 69% increase from 1999 (1.7 million anglers) and a 20.8% decrease from 2007 (3.7 million anglers). These anglers were residents of either a coastal (2.3 million anglers) or non-coastal county (560,000 anglers) in the South Atlantic region.[3] The number of coastal county anglers in 2008 increased 61% from 1999 (1.45 million anglers) and decreased 26% from 2007 (3.2 million anglers). Non-coastal county angler participation increased 118% from 1999 (257,000 anglers) and increased 13.6% from 2007 (493,000 anglers). Seventy percent of the South Atlantic's total anglers fished in East Florida.

In 2008, the majority of recreational fishermen in East Florida and Georgia were residents of a coastal county[4] within their respective state. These anglers comprised 65% of total anglers in East Florida and 43% of total anglers in Georgia. In contrast, most of North Carolina and South

[3] In *Fisheries Economics of the U.S., 2006* (FEUS 2006), angler participation totals from 1997-2006 incorrectly included out-of-state anglers at the region level. In this report, the 1999-2008 angler participation totals excludes these anglers.
[4] All resident anglers in Florida are considered coastal county anglers.

Carolina's anglers were out-of-state residents: 1.1 million anglers or 55% of total anglers in North Carolina and 604,000 anglers or 64.1% of total anglers in South Carolina. Non-coastal county residents accounted for a minority of total anglers in South Carolina (11%) and North Carolina (15%). Out-of-state residents comprised the smallest group of anglers in Georgia (22% of total anglers).

Recreational Fishing Facts

Participation

- An average of 2.72 million anglers fished in the South Atlantic annually from 1999 to 2008. There were more anglers fishing in East Florida than any other state.
- In 2008, coastal county residents made up 81% of total anglers in this region. These anglers averaged 84% of total anglers annually over the 10 year time period. Coastal county angler participation decreased significantly (26.2%) from 2007 to 2008.
- Non-coastal county resident anglers had the largest annual increase in participation, increasing 49% from 1999 to 2000.

Fishing trips

- In the South Atlantic, an average of nearly 21 million trips were taken annually between 1999 and 2008. Most of these fishing trips were taken in East Florida.
- Private or rental boat and shore-based fishing trips accounted for 11 million and 10.7 million fishing trips, respectively, in 2008. Together, these made up 97% of fishing trips taken that year.
- From 1999-2000, shore-based fishing trips increased 53%, the largest annual increase in fishing trip mode. From 1999-2000, for-hire fishing trips declined 22%, the largest annual decrease.

Harvest and release

- Atlantic croaker and spot was the most caught key species or species group in the region, averaging 9 million fish caught from 1999 to 2008. Of these, 59% were harvested rather than released in 2008.
- Half of the key species or groups caught from 1998-2007 were most often harvested rather than released. Dolphinfish (87% harvested), king mackerel (75%), and Spanish mackerel (64%) are examples.
- Key species or groups that are most often released rather than harvested from 1998-2007 include sharks (99% released), spotted seatrout (76%), and black sea bass (81%).
- Black sea bass had the largest annual increase in catch, increasing 95% from 2003 to 2004. The largest annual decrease in catch was for King Mackerel (decrease of 40% from 2007 to 2008).

Fishing Trips

Recreational fishermen took 22 million fishing trips in the South Atlantic in 2008. This was a 54.2% increase from 1999 (14.4 million trips) and a 13.2% decrease from 2007 (25.7 million trips). In 2008, over 49% of total trips taken in the region were taken from a private or rental boat (11 million trips). Shore-based fishing trips were also popular with 10.7 million trips taken in 2007 or 48% of total trips in the region. All fishing modes in 2008 experienced decreases from 2007 to 2008. For-hire fishing decreased 6.9%, rental fishing decreased 16.2% and shore based fishing trips decreased 10.3%. Fishing trips taken from a for-hire boat was the only fishing mode to see a decrease between 1999 and 2008, decreasing nearly 13%.

At the state level, there were 11 million fishing trips taken in East Florida in 2008. Trips taken in East Florida accounted for most of the fishing trips in the South Atlantic: 50% of total trips in the region. Private or rental boat trips were the most popular fishing mode in East Florida (6.45 million trips). North Carolina ranked second in terms of the total number of fishing trips taken in the South Atlantic with 7.18 million trips taken by anglers in 2008. South Carolina (2.6 million trips) and Georgia (1.28 million trips) followed. Private or rental boat trips accounted for most of the trips taken in South Carolina and Georgia, while shore-based trips were the most popular mode in North Carolina.

Harvest and Release

Atlantic croaker and spot had the highest catch totals of any key species or species groups in the South Atlantic. In 2008, approximately 10 million fish were caught by anglers in the region and 59% of these fish were harvested rather than released. Over 54% of these fish were caught in North Carolina. Spotted seatrout (6.3 million fish) and bluefish (5.3 million fish) were other key species that were caught in large numbers in 2008. Both of these species were more often released by anglers rather than harvested: 75% of spotted seatrout and 65% of bluefish. Sharks were also released in large numbers (99.7% of fish caught). In contrast, dolphinfish (84% harvested) and king mackerel (75%) were most often harvested rather than released.

All of the South Atlantic's key species and species groups showed increases in catch totals between 1999 and 2008, except dolphinfish which decreased by 18%. Key species or groups with dramatic changes over the ten years included a 130% increase in total catch of red drum, 386% increase in sharks, and 111% increase in bluefish.

Between 2007 and 2008, bluefish, dolphinfish, Atlantic croaker (24%), spotted sea trout (15%), king mackerel (5.1%), and black sea bass (17%) decreased in total catch. All other key species or species groups increased during this period with the largest increases observed for Spanish mackerel (29%) and porgies (20%).

At the state level, Atlantic croaker and spot were the most caught key species or species group in 2008 for North Carolina (5.4 million fish). About 50% these fish were harvested rather than released. Spotted seatrout was the most commonly caught key species or species groups in East Florida (2.3 million fish). The majority of these fish were released rather than harvested. In Georgia, southern kingfish was the most caught species (1.8 million fish). In South Carolina, Atlantic croaker and spot were the most caught key species or species group (2.8 million fish). Over 86% of these fish were harvested by anglers rather than released.

Marine Economy[5]

In 2007, the South Atlantic's gross domestic product totaled $1.68 trillion. Employee compensation totaled $933 billion and annual payroll totaled $595 billion. These totals

[5]Data for 2008 were unavailable for this report therefore 2007 information is reported in this section.

were all increases from 1998 levels (64%, 37%, and 61%, respectively) and (37%, 14%, and 61% in real terms) and 2006 levels (3.4%, 4.3%, and 3.6%, respectively). There was a decrease between 2006 and 2007 (2.3%, 1.4%, and 2.1%, respectively). Across the region, there were approximately 1.1 million establishments that employed over 16 million full- and part-time employees in 2007. Both of these economic measures increased from 1998 to 2007 (20% and 19%, respectively) and from 2006 to 2007 (2% and less than 0.1%, respectively).

At the state level, Florida[6] had the highest establishment and employee numbers, annual payroll, employee compensation, and gross state product levels in the region. Florida's 523,000 establishments employed over 7.4 million employees in 2007. The gross state product in Florida was $741 billion followed by Georgia ($391 billion), North Carolina ($390 billion), and South Carolina ($152 billion).

Florida had the highest commercial fishing location quotient (CFLQ) in the South Atlantic region: 0.99 in 2007. This was a 27% decrease from 2001 (1.36) and a 2% decrease from 2006 (1.01). Florida's CFLQ suggests that the level of employment in commercial fishing-related industries in Florida is slightly lower than the level of employment in these industries nationwide.[7] The CFLQ in 2007 was 0.18 in South Carolina (59% decrease relative to 2001), 0.07 in Georgia (42% decrease relative to 2001), and 0.1 in North Carolina (a 57% decrease relative to 2001).

Seafood Sales and Processing

There were 249 nonemployer firms engaged in seafood product preparation and packaging across the South Atlantic region in 2007. These firms had an annual receipt total of $15.4 million in 2007. Most of these firms were located in Florida (68%). The number of firms increased 101% Region-wide from 1999 to 2007, and increased 166% in Florida and 209% in Georgia. Region-wide annual receipt totals increased 48% (31% in real terms) relative to 1999 levels, with large state level increases in South Carolina (371%, 317% in real terms), Georgia (68%, 49% in real terms) and Florida (47%, 30% in real terms).

In 2007, 53 employer establishments involved in seafood product preparation. From 1999 to 2007, the number of establishments decreased 38% Region-wide and this trend was mirrored at the state level. Annual payroll increased (10%, 2% decrease in real terms) in Florida to $58 million and increased 15% (2% in real terms) in North Carolina to $13 million. Annual payroll amounts were not available for Georgia or South Carolina.

There were 406 establishments engaged in the seafood wholesale industry that employed over 3,800 full- and part-time workers across the South Atlantic in 2007. Two-thirds of these firms were located in Florida. From 1999-2007, the region's seafood wholesale establishment and employee numbers decreased 23% and 13%, respectively. With the exception of Georgia where employee numbers increased 27%, double digit percentage declines were observed in all state establishment and employee numbers. South Carolina experienced a smaller decline in employee numbers (4%). Region-wide annual payroll totaled $138 million in 2007, a 21% increase (7% in real terms) from 1999 levels. Georgia had the largest increase in annual payroll totals in the region, increasing 78% from 1999-2007.

Nonemployer seafood retail firms experienced a small increase in numbers, increasing 35% to 631 firms in 2007. The largest increase in firm numbers was in Florida (44%). Most firms were located in Florida (51%) and North Carolina (24%). Annual receipts totaled $55 million Region-wide, a 41% increase (24% in real terms) from 1999-2007. The largest increase in annual receipts was in Georgia (93%, 71% in real terms).

Employer establishments engaged in seafood retail increased 21% Region-wide from 1999-2007. Double digit increases, excluding Georgia were also observed at the state level. These 359 establishments employed approximately 1,600 full- and part-time employees and had an annual payroll totaling $31 million. Most of these establishments, employees, and annual payroll were located in Florida (47%, 61%, and 67%, respectively). Region-wide, employee numbers increased 27% from 1999 to 2007 with the largest increase in Florida (14%). Annual payroll totals increased 22% (8% in real terms) in the South Atlantic and 46% in Georgia and 64% in North Carolina. Florida experienced a less than 1% decrease in payroll over this time period.

Transport, Support, and Marine Operations

Within this industry sector, marina industries had the highest number of establishments in 2007 with 729 establishments across the South Atlantic. This was an 11% increase over 1999 levels. Over two-thirds of these marina operations were located in Florida. The number of people employed by this industry and annual payroll totals also increased 52% and 98% (75% in real terms), respectively. Most of this growth was in Florida.

Ship and boat building industries employed the most people in 2007 (17,500 full- and part-time workers) and had the highest annual payroll ($640 million). Overall, a decrease was observed for this industry, employee numbers decreased 15% and annual payroll totals increased 9% from 1999-2007 (4% decrease in real terms). Most of the ship and boat building activity in the region occurred in Florida (73%). At the state level, large changes occurred in Georgia (25% decrease in establishments), North Carolina (5% increase in establishments), and South Carolina (70% increase (50% in real terms) in annual payroll).

Other industries with large changes from 1999 to 2007 were coastal and Great Lakes freight transportation (150% increase in establishments in South Carolina and a 50% increase in Georgia); deep sea freight transportation (50% decrease in establishments in South Carolina); and deep sea passenger transportation (67% decrease in establishments region-wide).

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[6]Information reported here is for the state of Florida, not East Florida.
[7]The CFLQ for the U.S. is 1.0. This provides a national baseline from which state CFLQs can be compared.