

2007 Economic Impacts of Washington Seafood Industry (*thousands of dollars*)

|                                    | Sales Impacts | Income Impacts | Job Impacts |
|------------------------------------|---------------|----------------|-------------|
| <b>Total Impacts</b>               | 3,688,407     | 2,037,406      | 73,379      |
| Commercial Harvesters              | 232,279       | 115,601        | 3,135       |
| Seafood Processors & Dealers       | 460,967       | 229,325        | 5,085       |
| Seafood Wholesalers & Distributors | 636,082       | 312,663        | 5,841       |
| Retail Sector                      | 2,359,079     | 1,379,817      | 59,318      |

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

|                 | 1998    | 1999    | 2000    | 2001    | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    |
|-----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue   | 109,446 | 119,869 | 133,499 | 140,382 | 143,720 | 172,829 | 166,247 | 193,317 | 217,030 | 209,372 |
| Finfish & Other | 36,133  | 28,652  | 36,828  | 38,342  | 39,854  | 47,415  | 55,906  | 50,145  | 68,201  | 58,980  |
| Shellfish       | 73,313  | 91,217  | 96,671  | 102,040 | 103,867 | 125,414 | 110,342 | 143,172 | 148,829 | 150,392 |
| Clams           | 25,398  | 26,730  | 27,920  | 32,677  | 34,339  | 36,060  | 42,297  | 48,503  | 55,786  | 52,080  |
| Crab            | 24,912  | 39,498  | 38,262  | 37,681  | 37,232  | 56,374  | 29,024  | 50,872  | 43,464  | 54,315  |
| Hake (Whiting)  | 618     | 748     | 1,022   | 1,299   | 1,022   | 1,601   | 2,341   | 4,937   | 7,296   | 7,121   |
| Halibut         | 6,955   | 7,903   | 6,729   | 5,759   | 6,777   | 5,991   | 7,264   | 6,512   | 8,303   | 8,842   |
| Mussels         | 2,445   | 3,720   | 3,564   | 2,426   | 1,613   | 2,513   | 3,096   | 3,729   | 6,564   | 3,820   |
| Oysters         | 17,308  | 17,798  | 22,473  | 24,642  | 25,578  | 26,142  | 31,257  | 33,697  | 38,302  | 35,433  |
| Sablefish       | 3,931   | 5,738   | 6,545   | 5,984   | 4,354   | 6,675   | 6,517   | 7,395   | 8,307   | 6,608   |
| Salmon          | 9,494   | 4,863   | 9,709   | 10,332  | 11,780  | 9,941   | 17,316  | 14,319  | 24,586  | 21,620  |
| Shrimp          | 2,633   | 2,882   | 3,611   | 3,697   | 4,473   | 3,723   | 3,648   | 4,335   | 3,602   | 3,745   |
| Tuna, Albacore  | 8,785   | 3,600   | 5,821   | 7,917   | 7,375   | 15,621  | 15,657  | 10,643  | 15,176  | 10,439  |

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

|                 | 1998    | 1999   | 2000    | 2001    | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    |
|-----------------|---------|--------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings  | 101,710 | 89,156 | 112,181 | 154,701 | 172,277 | 189,479 | 192,181 | 213,502 | 241,606 | 194,582 |
| Finfish & Other | 76,052  | 56,145 | 77,359  | 114,764 | 125,903 | 132,940 | 155,224 | 156,902 | 191,717 | 150,704 |
| Shellfish       | 25,658  | 33,011 | 34,822  | 39,937  | 46,374  | 56,539  | 36,957  | 56,600  | 49,889  | 43,878  |
| Clams           | 1,962   | 2,224  | 2,109   | 2,632   | 3,087   | 3,127   | 3,319   | 3,621   | 4,617   | 3,908   |
| Crab            | 13,205  | 19,004 | 17,752  | 19,024  | 21,380  | 34,037  | 14,955  | 32,086  | 24,619  | 22,487  |
| Hake (Whiting)  | 23,177  | 18,698 | 24,399  | 35,593  | 22,564  | 35,124  | 69,117  | 93,654  | 120,058 | 91,272  |
| Halibut         | 4,244   | 3,060  | 2,289   | 2,490   | 2,487   | 1,868   | 2,254   | 1,948   | 2,451   | 2,428   |
| Mussels         | 296     | 332    | 374     | 332     | 214     | 337     | 427     | 504     | 774     | 475     |
| Oysters         | 6,518   | 6,769  | 8,458   | 9,497   | 9,935   | 9,649   | 11,058  | 12,190  | 12,306  | 11,836  |
| Sablefish       | 2,958   | 4,078  | 3,755   | 3,589   | 2,559   | 3,736   | 4,064   | 4,240   | 4,259   | 3,035   |
| Salmon          | 13,733  | 7,112  | 11,971  | 23,291  | 26,626  | 25,493  | 27,918  | 17,926  | 26,570  | 20,880  |
| Shrimp          | 3,137   | 4,175  | 5,520   | 7,764   | 11,149  | 8,867   | 6,599   | 7,279   | 6,926   | 4,455   |
| Tuna, Albacore  | 14,361  | 4,519  | 7,003   | 9,110   | 11,708  | 23,672  | 18,044  | 10,505  | 19,133  | 13,129  |

## Average Annual Price for Key Species / Species Groups

|                | 1998  | 1999  | 2000  | 2001  | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  |
|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Clams          | 12.95 | 12.02 | 13.24 | 12.42 | 11.12 | 11.53 | 12.74 | 13.40 | 12.08 | 13.33 |
| Crab           | 1.89  | 2.08  | 2.16  | 1.98  | 1.74  | 1.66  | 1.94  | 1.59  | 1.77  | 2.42  |
| Hake (Whiting) | 0.03  | 0.04  | 0.04  | 0.04  | 0.05  | 0.05  | 0.03  | 0.05  | 0.06  | 0.08  |
| Halibut        | 1.64  | 2.58  | 2.94  | 2.31  | 2.73  | 3.21  | 3.22  | 3.34  | 3.39  | 3.64  |
| Mussels        | 8.26  | 11.21 | 9.52  | 7.30  | 7.53  | 7.46  | 7.26  | 7.40  | 8.48  | 8.05  |
| Oysters        | 2.66  | 2.63  | 2.66  | 2.59  | 2.57  | 2.71  | 2.83  | 2.76  | 3.11  | 2.99  |
| Sablefish      | 1.33  | 1.41  | 1.74  | 1.67  | 1.70  | 1.79  | 1.60  | 1.74  | 1.95  | 2.18  |
| Salmon         | 0.69  | 0.68  | 0.81  | 0.44  | 0.44  | 0.39  | 0.62  | 0.80  | 0.93  | 1.04  |
| Shrimp         | 0.84  | 0.69  | 0.65  | 0.48  | 0.40  | 0.42  | 0.55  | 0.60  | 0.52  | 0.84  |
| Tuna, Albacore | 0.61  | 0.80  | 0.83  | 0.87  | 0.63  | 0.66  | 0.87  | 1.01  | 0.79  | 0.80  |

**2006 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)<sup>1</sup>**

| Impact Category  | Jobs          | Total Sales      | Value Added    |
|--|---------------|------------------|----------------|
| Trip Impacts by Fishing Mode:                                  |               |                  |                |
| Private Boat   | 96            | 10,990           | 5,743          |
| Shore Mode   | 293           | 30,471           | 16,346         |
| For-Hire   | 197           | 18,313           | 10,225         |
| Total Durable Equipment Impacts                                | 10,440        | 1,067,145        | 574,160        |
| <b>Total State Trip and Durable Equipment Economic Impacts</b> | <b>11,025</b> | <b>1,126,920</b> | <b>606,474</b> |

**2006 Angler Trip & Durable Equipment Expenditures (thousands of dollars)<sup>1</sup>**

| Fishing Mode   | Trip Expenditures |           | Durable Equipment Expenditures       | Expenditures     |
|--|-------------------|-----------|--------------------------------------|------------------|
|  | Non-Residents     | Residents |                                      |                  |
| Private Boat   | 1,262             | 6,825     | Fishing Tackle                       | 98,378           |
| Shore  | 4,946             | 19,220    | Other Equipment                      | 68,885           |
| For-Hire   | 1,097             | 10,832    | Boat Expenses                        | 1,052,087        |
| Total Trip Expenditures                                    | 7,305             | 36,877    | Vehicle Expenses                     | 65,239           |
|  |                   |           | Second Home Expenses                 | 29,229           |
|  |                   |           | Total Durable Equipment Expenditures | 1,313,819        |
| <b>Total State Trip and Durable Equipment Expenditures</b> |                   |           |                                      | <b>1,358,001</b> |

**Recreational Anglers by Residential Area (thousands of anglers)**

|                      | 1998       | 1999       | 2000       | 2001       | 2002       | 2003       | 2004       | 2005       | 2006       | 2007                  |
|----------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|
| Coastal              | 128        | 117        | 179        | 297        | 217        | 150        | 136        | 131        | 125        | NA <sup>2</sup>       |
| Non-Coastal          | 42         | 64         | 65         | 212        | 41         | 58         | 52         | 50         | 47         | NA <sup>2</sup>       |
| Out-of-State         | 13         | 10         | 10         | 14         | 25         | 14         | 12         | 12         | 11         | NA <sup>2</sup>       |
| <b>Total Anglers</b> | <b>183</b> | <b>191</b> | <b>254</b> | <b>524</b> | <b>284</b> | <b>222</b> | <b>200</b> | <b>193</b> | <b>183</b> | <b>NA<sup>2</sup></b> |

**Recreational Fishing Effort by Mode (thousands of trips)**

|                    | 1998       | 1999       | 2000       | 2001         | 2002         | 2003       | 2004       | 2005       | 2006       | 2007                  |
|--------------------|------------|------------|------------|--------------|--------------|------------|------------|------------|------------|-----------------------|
| For-Hire           | 45         | 49         | 52         | 33           | 59           | 69         | 64         | 62         | 57         | NA <sup>2</sup>       |
| Private or Rental  | 182        | 241        | 368        | 824          | 247          | 209        | 135        | 113        | 84         | NA <sup>2</sup>       |
| Shore              | 482        | 326        | 455        | 670          | 711          | 512        | 512        | 512        | 512        | NA <sup>2</sup>       |
| <b>Total Trips</b> | <b>709</b> | <b>616</b> | <b>875</b> | <b>1,527</b> | <b>1,017</b> | <b>790</b> | <b>711</b> | <b>687</b> | <b>653</b> | <b>NA<sup>2</sup></b> |

**Harvest (H) and Release (R) of Key Species / Species Groups (number of fish in thousands)<sup>3</sup>**

| Species/Groups               |   | 1998  | 1999  | 2000  | 2001  | 2002  | 2003  | 2004  | 2005  | 2006  | 2007            |
|------------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-----------------|
| Cod, Pacific                 | H | 1     | (1)   | (1)   | 1     | 2     | 3     | 6     | 5     | 1     | NA <sup>2</sup> |
|                              | R | 2     | (1)   | 1     | (1)   | (1)   | (1)   | 1     | (1)   | (1)   | NA <sup>2</sup> |
| Flatfishes                   | H | 240   | 141   | 158   | 119   | 216   | 62    | 62    | 61    | 63    | NA <sup>2</sup> |
|                              | R | 96    | 93    | 102   | 66    | 209   | 92    | 41    | 41    | 42    | NA <sup>2</sup> |
| Greenlings                   | H | 100   | 65    | 100   | 73    | 85    | 59    | 39    | 39    | 33    | NA <sup>2</sup> |
|                              | R | 25    | 9     | 36    | 33    | 141   | 64    | 25    | 25    | 22    | NA <sup>2</sup> |
| Herring & Smelt <sup>4</sup> | H | 3,511 | 1,545 | 2,065 | 3,649 | 3,254 | 2,487 | 2,486 | 2,486 | 2,486 | NA <sup>2</sup> |
|                              | R | 204   | 174   | 60    | 161   | 196   | 136   | 126   | 126   | 126   | NA <sup>2</sup> |
| Rockfishes                   | H | 531   | 304   | 268   | 199   | 237   | 184   | 256   | 307   | 282   | NA <sup>2</sup> |
|                              | R | 23    | 9     | 8     | 14    | 50    | 20    | 25    | 33    | 23    | NA <sup>2</sup> |
| Salmon                       | H | 183   | 176   | 253   | 735   | 320   | 570   | 348   | 291   | 174   | NA <sup>2</sup> |
|                              | R | 188   | 191   | 277   | 542   | 362   | 391   | 415   | 216   | 306   | NA <sup>2</sup> |
| Sculpins                     | H | 30    | 23    | 24    | 10    | 35    | 17    | 17    | 17    | 16    | NA <sup>2</sup> |
|                              | R | 119   | 64    | 202   | 85    | 142   | 101   | 91    | 91    | 91    | NA <sup>2</sup> |
| Sturgeon                     | H | 9     | 9     | 8     | 7     | 8     | 6     | 5     | 5     | 5     | NA <sup>2</sup> |
|                              | R | 39    | 34    | 28    | 21    | 27    | 18    | 25    | 30    | 21    | NA <sup>2</sup> |
| Surfperches                  | H | 202   | 108   | 198   | 89    | 104   | 143   | 133   | 133   | 133   | NA <sup>2</sup> |
|                              | R | 84    | 152   | 227   | 101   | 105   | 125   | 120   | 120   | 120   | NA <sup>2</sup> |
| Tuna, Albacore               | H | 21    | 4     | 7     | 4     | 6     | 11    | 14    | 12    | 24    | NA <sup>2</sup> |
|                              | R | (1)   | (1)   | (1)   | (1)   | (1)   | (1)   | (1)   | (1)   | 1     | NA <sup>2</sup> |

<sup>1</sup>2007 data was not available for this report; 2006 economic impact and expenditure information are reported here.

<sup>2</sup>2007 data was not available for this report; NA = data is not available.

<sup>3</sup>In this table, "1" = 1000-1499 fish were harvested or released and "(1)" = 0-999 fish were harvested or released.

<sup>4</sup>Species included in this group may not be equivalent to species with similar names listed in the commercial tables.

## Washington's State Economy (% of national total)

|          | Establishments | Employees        | Annual Payroll<br>(\$ millions) | Employee<br>Compensation<br>(\$ millions) | Gross State<br>Product<br>(\$ millions) | Commercial<br>Location<br>Quotient <sup>1</sup> |
|----------|----------------|------------------|---------------------------------|---|---|---|
| 1998     | 161,473 (2.3%) | 2,134,598 (2.0%) | 73,268 (2.2%)                   | 133,974 (2.3%) <sup>2</sup>               | 195,794 (2.3%)                          | 12.46   |
| 2006     | 179,908 (2.4%) | 2,421,269 (2.0%) | 104,191 (2.2%)                  | 169,797 (2.3%)                            | 291,298 (2.2%)                          | 13.86   |
| % change | 11.4%          | 13.4%            | 42.2%                           | 26.7%                                     | 48.8%                                   | 11.2%   |

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

|   |          | 1998  | 1999  | 2000  | 2001  | 2002  | 2003  | 2004  | 2005  | 2006  |
|---|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Seafood product preparation & packaging | Firms    | 36    | 32    | 37    | 41    | 48    | 59    | 53    | 54    | 53    |
|   | Receipts | 5,455 | 1,965 | 3,052 | 3,432 | 2,763 | 5,680 | 4,446 | 5,568 | 4,149 |
| Seafood sales, retail                   | Firms    | 33    | 28    | 28    | 29    | 30    | 32    | 30    | 31    | 29    |
|   | Receipts | 1,477 | 1,887 | 2,139 | 2,465 | 2,681 | 1,623 | 2,202 | 1,836 | 1,727 |

## Seafood Sales &amp; Processing – Employer Establishments (thousands of dollars)

|   |                | 1998    | 1999    | 2000    | 2001    | 2002    | 2003    | 2004    | 2005    | 2006    |
|---|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Seafood product preparation & packaging | Establishments | 116     | 116     | 119     | 112     | 106     | 110     | 101     | 98      | 96      |
|   | Employees      | 8,587   | 7,276   | 6,784   | 6,498   | 6,728   | 5,968   | 5,851   | 5,743   | 5,705   |
|   | Payroll        | 219,324 | 207,487 | 218,517 | 216,660 | 221,978 | 231,153 | 247,316 | 239,962 | 255,129 |
| Seafood sales, wholesale                | Establishments | 189     | 184     | 176     | 176     | 175     | 121     | 116     | 126     | 115     |
|   | Employees      | 1,550   | 1,617   | 1,654   | 1,444   | 1,185   | 1,112   | 883     | 1,094   | 1,015   |
|   | Payroll        | 53,777  | 61,101  | 64,074  | 56,122  | 51,959  | 39,206  | 37,292  | 42,852  | 42,934  |
| Seafood sales, retail                   | Establishments | 28      | 31      | 28      | 32      | 44      | 37      | 40      | 47      | 49      |
|   | Employees      | 160     | 179     | 182     | 198     | 235     | 284     | 222     | 291     | 292     |
|   | Payroll        | 4,465   | 4,296   | 4,122   | 4,503   | 6,379   | 6,363   | 6,578   | 9,322   | 8,998   |

## Transport, Support, &amp; Marine Operations – Employer Establishments (thousands of dollars)

|  |                | 1998    | 1999    | 2000    | 2001    | 2002            | 2003    | 2004    | 2005    | 2006    |
|--|----------------|---------|---------|---------|---------|-----------------|---------|---------|---------|---------|
| Coastal & Great Lakes freight transportation | Establishments | 34      | 28      | 32      | 30      | 33              | 36      | 38      | 41      | 43      |
|  | Employees      | 2,543   | 2,484   | 2,356   | 2,330   | 2,173           | 1,607   | 2,039   | 1,672   | 2,353   |
|  | Payroll        | 122,338 | 128,253 | 128,747 | 129,997 | 130,456         | 112,319 | 128,786 | 122,000 | 145,144 |
| Deep sea freight transportation              | Establishments | 25      | 27      | 21      | 22      | 23              | 27      | 23      | 24      | 23      |
|  | Employees      | 1,005   | 877     | 736     | 584     | ND <sup>3</sup> | 276     | 311     | 378     | 197     |
|  | Payroll        | 55,802  | 53,319  | 41,689  | 29,209  | ND              | 16,147  | 20,559  | 22,655  | 14,390  |
| Deep sea passenger transportation            | Establishments | 5       | 6       | 7       | 8       | 7               | 3       | 2       | 3       | 3       |
|  | Employees      | 412     | 419     | 435     | 494     | ND              | ND      | ND      | ND      | ND      |
|  | Payroll        | 11,949  | 15,633  | 18,145  | 20,543  | ND              | ND      | ND      | ND      | ND      |
| Marinas                                      | Establishments | 127     | 123     | 116     | 119     | 111             | 102     | 96      | 96      | 103     |
|  | Employees      | 515     | 574     | 575     | 573     | 406             | 430     | 449     | 442     | 466     |
|  | Payroll        | 12,951  | 14,211  | 15,714  | 14,516  | 11,283          | 12,400  | 12,763  | 13,556  | 14,269  |
| Marine cargo handling                        | Establishments | 32      | 33      | 36      | 36      | 33              | 23      | 30      | 30      | 29      |
|  | Employees      | 2,861   | 2,361   | 3,322   | 2,847   | 2,538           | ND      | ND      | 4,459   | 3,764   |
|  | Payroll        | 180,789 | 186,461 | 238,138 | 213,946 | 194,398         | ND      | ND      | 318,873 | 303,375 |
| Navigational services to shipping            | Establishments | 62      | 57      | 56      | 57      | 55              | 52      | 53      | 53      | 56      |
|  | Employees      | 239     | ND      | ND      | 239     | 218             | 834     | ND      | 841     | 942     |
|  | Payroll        | 14,899  | ND      | ND      | 20,235  | 20,962          | 51,092  | ND      | 60,034  | 72,120  |
| Port & harbor operations                     | Establishments | 5       | 7       | 6       | 5       | 4               | 3       | 4       | 6       | 5       |
|  | Employees      | ND      | ND      | ND      | ND      | 37              | ND      | ND      | ND      | 53      |
|  | Payroll        | ND      | ND      | ND      | ND      | 1,565           | ND      | ND      | ND      | 3,436   |
| Ship & boat building                         | Establishments | 155     | 141     | 132     | 134     | 135             | 138     | 141     | 154     | 164     |
|  | Employees      | 6,063   | 6,036   | 6,442   | 5,532   | 4,974           | 6,056   | 6,474   | 7,154   | 7,669   |
|  | Payroll        | 210,994 | 219,467 | 225,433 | 194,050 | 219,980         | 244,124 | 272,336 | 307,735 | 313,230 |

<sup>1</sup>The U.S. Commercial Fishing Location Quotient (CFLQ) of 1.0 represents the national baseline from which state CFLQs can be compared.

<sup>2</sup>Employee Compensation data for 1998 were not available. Data from 2001 are reported here.

<sup>3</sup>ND = Data are suppressed due to confidentiality restrictions.