National Highlights from

Fisheries Economics of the United States, 2013

NOAA FISHERIES

About the Report

Fisheries Economics of the United States reports on the economic performance of commercial and recreational fisheries, the seafood industry, and related sectors. Key economic indicators include employment, sales, and value added impacts to the broader economy.

View the Report

www.st.nmfs.noaa.gov/economics/publications/feus/FEUS-2013/fisheries_economics_2013

Overview

Fisheries are an economic engine. They keep workers on the job, vacationers on the coast, and cash registers ringing all across our nation.

At NOAA Fisheries, we track the contribution that commercial and recreational fisheries, and the broader seafood industry, make to the U.S. economy. Every year we publish that data in *Fisheries Economics of the United States*, a report that highlights the economic benefits that these industries provide.

We're working with fishermen and other partners to keep our fisheries sustainable, so the American people can enjoy these benefits today and in future generations. We're also working to protect the nation's seafood supply with inspections, enforcement, and international partnerships, so consumers can have confidence in the seafood they buy.

Fisheries provide jobs, food, and recreational opportunities, and they are a vital part of our cultural heritage. They're also an economic engine, and one that will continue to run as long as we manage them sustainably. At NOAA Fisheries, we're working to keep that engine running.

So just how important are these industries to the U.S. economy?

This report shows that in 2013, the fishing and seafood industries:

SUPPORTED	GENERATED	ADDED
1.7M JOBS	**$195B** IN SALES	**$89B** TO GDP

What are we Measuring?

That 1.7 million jobs includes full and part-time jobs in the commercial and recreational fishing and seafood industries, such as jobs on boats and in restaurants. It also includes jobs in related sectors, such as marinas and boat repair, and jobs that are generated in the broader economy as people who work in those industries spend their paychecks.

The same is true for sales and value added to GDP. They represent economic impacts across the broader economy.

Commercial Fishing and the Seafood Industry

In 2013, commercial fishermen in the U.S. harvested 9.8 billion pounds of finfish and shellfish, earning $5.5 billion for their catch. This was a 47 percent increase in value from 2004 levels (an 8 percent increase after adjusting for inflation). Between 2012 and 2013, the value of the catch increased 9 percent.

With Imports and Without

We estimate the economic impacts of the commercial fishing and seafood industries combined. Because a large quantity of seafood is imported into the United States, we estimate those impacts both with imports and without. The calculations that include imports show the total economic impacts of these industries, while the calculations without imports are strictly based on the landings revenue generated by our domestic, sustainably managed fisheries.

WITH IMPORTS

1.35M jobs (+6% from 2012)

$142B sales (+1% from 2012)

$60B to GDP (+2% from 2012)

JOBS — **TOP STATES**

1. California | **132,000 jobs**
2. Massachusetts | **100,100 jobs**
3. Florida | **78,400 jobs**

WITHOUT IMPORTS

831,200 jobs (+12% from 2012)

$54B sales (+8% from 2012)

$28B to GDP (+8% from 2012)

JOBS —**TOP STATES**

1. Alaska | **68,200 jobs**
2. Massachusetts | **64,300 jobs**
3. Lousiana | **37,700 jobs**

WHY DOES CALIFORNIA HAVE THE HIGHEST COMMERCIAL JOB IMPACTS?

Job impacts include jobs in the fishing sector as well as jobs the commercial fishing and seafood industries generate in the broader economy. So while California ranked only 7th in terms of landings revenue, high consumer demand coupled with imports resulted in the state enjoying the greatest number of job impacts in the nation.

Recreational Fishing

Recreational fishing is a favorite activity in many coastal communities across the United States as well as an important part of the economy. In 2013, 11 million saltwater anglers took 72 million fishing trips, spending $25 billion on trip-related and durable goods such as second homes and boats.

The economic impact of marine recreational fishing is calculated from the expenditures made by saltwater anglers.

370,000 jobs (-3% from 2012)

$52.4B sales (-10% from 2012)

$29B to GDP (-5% from 2012)

JOBS — **TOP STATES**

1. Florida | **112,800 jobs**
2. Louisiana | **19,000 jobs**
3. North Carolina | **16,200 jobs**

RECREATIONAL FISHING JOBS DECREASED 3 PERCENT FROM 2012-2013. WHY?

While some states saw substantial increases in job impacts from recreational fishing (New Hampshire, 51%; Rhode Island, 40%; Alabama, 35%) these were not enough to offset significant declines in other states (Connecticut, -40%; Delaware, -30%; Georgia, -20%). Importantly, both Florida and Louisiana, top states in terms of job impacts, experienced job gains from 2012. Taking a slightly longer perspective, recreational job impacts across the nation increased 13 percent between 2010 and 2013.

U.S. Catch Share Programs

Catch share programs provide individual fishermen, fishing communities, cooperatives, and other entities the exclusive right to fish for a share of the total allowable catch. The NOAA Fisheries catch share policy is intended to maintain or rebuild fisheries and to sustain fishermen, coastal communities, and vibrant working waterfronts.

How are these Programs Performing?

Fisheries Economics of the United States provides key 2012* performance indicators. These indicators show:

- The race to fish has ended, resulting in longer fishing seasons, safer working conditions, and improved management performance.
- Catch share species revenue increased in 12 of 16 programs and sub-programs.
- The number of active vessels decreased in all programs but one.
- Revenue per vessel increased in all programs.
- Annual catch limits were not exceeded in any program.

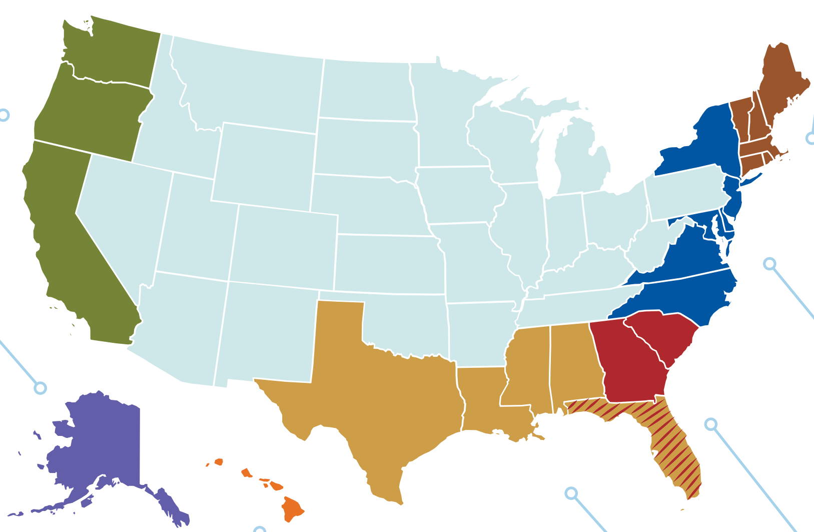
* 2012 is the latest year for which key performance indicators are available

Looking Foward

The Atlantic Highly Migratory Species Individual Bluefin Quota Program will begin in 2015, bringing the total number of federal catch share programs to 16.

Catch Share Programs by Region

YEAR IMPLEMENTED | PROGRAM NAME (IFQ/ITQ — Individual Fishing/Transferable Quota)



PACIFIC

1. **2001 |** Pacific Coast Sablefish Permit Stacking
2. **2011 |** Groundfish Trawl Rationalization

NORTH PACIFIC

1. **1992 |** Western Alaska Community Development Quota
2. **1995 |** Alaska Halibut & Sablefish IFQ
3. **1999 |** American Fisheries Act Pollock Cooperatives
4. **2005 |** Bering Sea and Aleutian Islands Crab Rationalization Program
5. **2008 |** Non-pollock Trawl Catcher/Processor Groundfish Cooperatives (Amendment 80)
6. **2012 |** Central Gulf of Alaska Rockfish Cooperatives**

**Pilot implemented in 2007

WESTERN PACIFIC

No Catch Share Programs

GULF OF MEXICO

1. **2007 |** Red Snapper IFQ
2. **2010 |** Grouper-Tilefish IFQ

NEW ENGLAND

1. **2010 |** Multispecies Sectors
2. **2010 |** Northeast General Category Atlantic Sea Scallop IFQ

MID-ATLANTIC

1. **1990 |** Surfclam & Ocean Quahog ITQ
2. **2009 |** Golden Tilefish IFQ

SOUTH ATLANTIC

1. **1992 |** Wreckfish ITQ

Regional Highlights

Commercial & Seafood — Commercial Fishing and the Seafood Industry (with imports)
Recreational — Recreational Fishing

North Pacific

Alaska harvested 60% of U.S. landings. Salmon landings revenue increased 54 percent in 2013, bouncing back from earlier disasters that affected several stocks. In Alaska, salmon alone generated $680 million in revenue, more than many regions generate from all their fisheries combined.

Commercial & Seafood
AK | 68,500 jobs
$1.9B landings revenue
(+2% from 2012)

Recreational
AK | $642M sales
$386M to GDP
5,500 jobs

Pacific

Job impacts in California decreased 9 percent, driven by job declines from imports. In contrast, jobs generated from domestically harvested seafood increased 12 percent. At the regional level, salmon landings more than doubled (+133%), largely due to higher quotas that reflect projected increases in abundance.

Commercial & Seafood
CA | 132,000 jobs
WA | 64,600 jobs
OR | 21,100 jobs

Region | $830M landings revenue (+23% from 2012)

Recreational
CA | 14,000 jobs
WA | 3,800 jobs
OR | 3,500 jobs

Western Pacific

In 2013, fishermen landed $82 million worth of tuna in Hawaii. That represented 56 percent of the value of the nation's total tuna catch. Of all the tuna landed in Hawaii in 2013, 66 percent was bigeye tuna.

Commercial & Seafood
HI | 10,000 jobs
$108M landings revenue
(-4% from 2012)

Recreational
HI | $127M sales
$69M to GDP
1,100 jobs

Gulf of Mexico

In 2013, commercial red snapper landings reached their highest level since 1984. The recreational harvest of red snapper, measured in pounds, was the highest it has been since reporting began in 1981. When measured in the number of fish caught, harvests were at their highest point since 2004. These trends were due to increasing red snapper abundance under the current rebuilding plan.

Commercial & Seafood
FL | 78,400 jobs
LA | 39,700 jobs
TX | 31,600 jobs
AL | 12,100 jobs
MS | 6,400 jobs

Region | $937M landings revenue (+24% from 2012)

Recreational
FL | 112,800 jobs
LA | 19,000 jobs
TX | 14,400 jobs
AL | 10,200 jobs
MS | 1,600 jobs

New England

In Massachusetts, job impacts from commercial fisheries decreased 6 percent. Although revenue from many species increased, this was not enough to offset declines from cod (-$10 million) due to a 77 percent decrease in the quota for Gulf of Maine cod, and from sea scallops (-$30 million) due to a decrease in quota meant to protect young sea scallops and maximize future harvest potential.

Commercial & Seafood
MA | 100,100 jobs
ME | 35,300 jobs
RI | 9,600 jobs
NH | 5,000 jobs
CT | 3,000 jobs

Region | $1.2B landings revenue (-2% from 2012)

Recreational
MA | 6,900 jobs
RI | 2,500 jobs
ME | 1,400 jobs
NH | 700 jobs
CT | 700 jobs

Mid-Atlantic

In Virginia, oyster production from aquaculture has been surging. In the ten-year period ending in 2013, oyster production in that state increased 557 percent.

Recreational fishing trips in the region were essentially flat in 2013 (-1% from 2012). The most frequently caught species were Atlantic croaker (17 million fish), summer flounder (14 million fish), and spot (12 million fish).

Commercial & Seafood
NY | 48,700 jobs
NJ | 41,300 jobs
VA | 16,200 jobs
MD | 12,400 jobs
DE | 400 jobs

Region | $458M landings revenue (-6% from 2012)

Recreational
NJ | 13,000 jobs
VA | 8,000 jobs
MD | 5,900 jobs
NY | 3,800 jobs
DE | 900 jobs

South Atlantic

Blue crab landings fell 19 percent between 2012 and 2013. However, because prices surged 45 percent, the value of those landings increased by 17 percent.

Regionally, 2.5 million anglers took 17 million fishing trips in 2013, spending $6.7 billion on saltwater fishing trips and durable goods such as vehicles ($2.7 billion), boats ($1.5 billion) and fishing tackle ($1.2 billion).

Commercial & Seafood
FL | 78,400 jobs
GA | 13,800 jobs
NC | 9,600 jobs
SC | 1,700 jobs

Region | $161M landings revenue (-6% from 2012)

Recreational
FL | 112,800 jobs
NC | 16,200 jobs
SC | 4,300 jobs
GA | 2,200 jobs