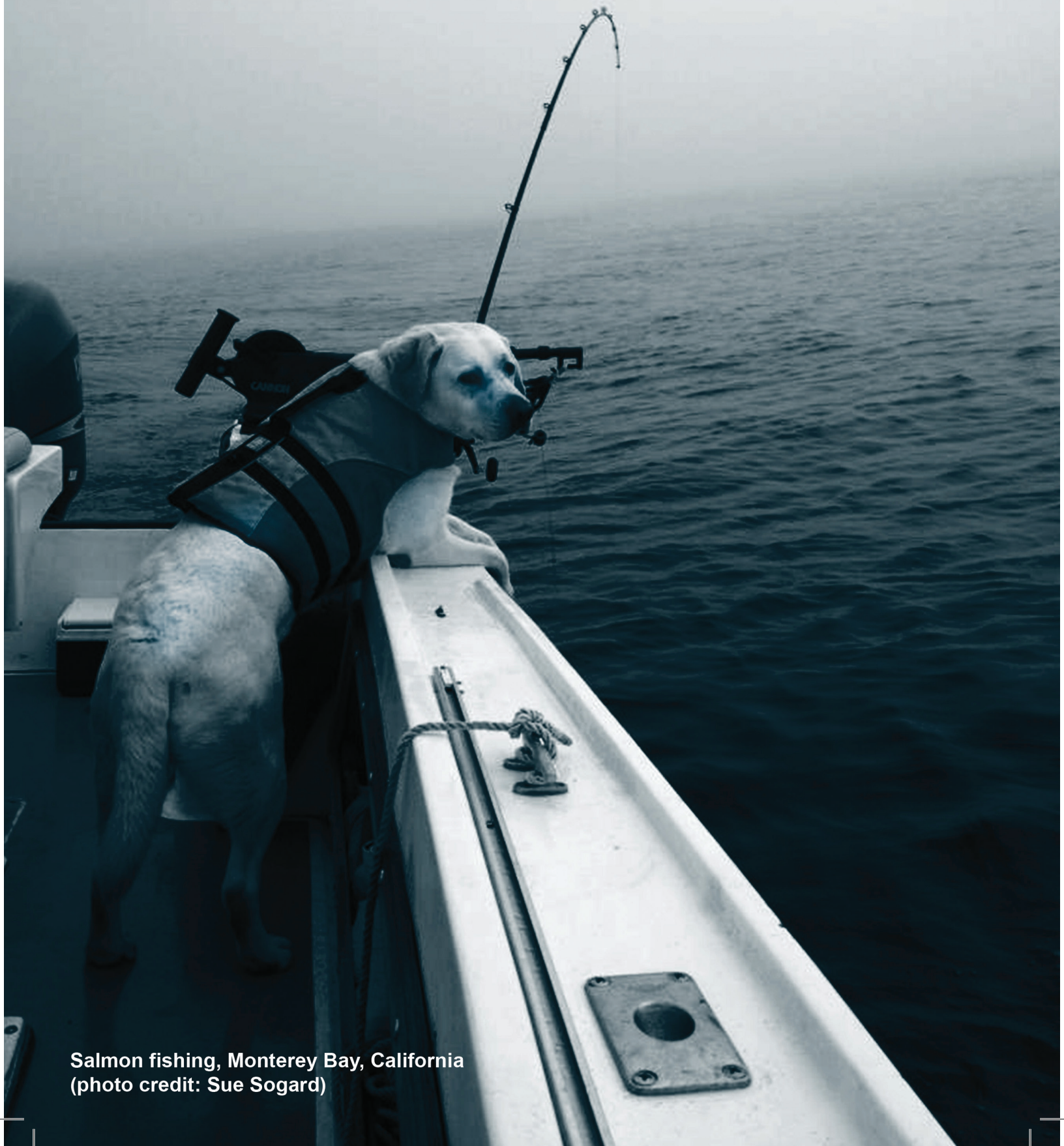


National Overview



Salmon fishing, Monterey Bay, California
(photo credit: Sue Sogard)

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, also known as the Magnuson-Stevens 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 are prosecuted 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.

Nationwide, there are 46 fishery management and ecosystem plans¹ that provide a framework for managing the harvest of 446 fish stocks and stock complexes. These fishery management plans (FMPs) are developed by Regional Fishery Management Councils (FMCs) in each of eight regions nationwide: the North Pacific, Western Pacific, Pacific, New England, Mid-Atlantic, South Atlantic, Gulf of Mexico, and Caribbean Regions. Once an FMP is developed, it must be approved by the Secretary of Commerce in consultation with NOAA Fisheries before it is implemented and enforced.

Regional Fishery Management Councils

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

There are 230 major fish stocks and stock complexes out of the total of 446 fish stocks and stock complexes. These 230 major fish stocks and stock complexes contribute over 90 percent of total fishery landings, overfishing status is known for 85 percent and overfished status for 77 percent. Currently, 41 stocks or stock complexes are categorized as overfished and 29 are categorized as subject to overfishing¹.

Transboundary and International Fisheries

NOAA Fisheries is also actively involved in negotiating conservation measures and fishery allocations for fisheries conducted in areas where the Exclusive Economic Zone (EEZ) of the U.S. overlaps with other nations (transboundary areas), and in areas beyond the U.S. EEZ (international waters or the high

seas). The Gulf of Alaska and the Gulf of Maine are examples of these transboundary areas. An area in the Bering Sea outside of 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

Regional Fishery Management Organizations (RFMOs) are multinational organizations with interests in transboundary and international fish stocks and associated fishing activities. NOAA Fisheries is party to eight RFMOs globally¹, and the list by ocean basin is provided below.

Pacific

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

Atlantic

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

The goal of these RFMOs is to adopt measures for the conservation and coordinated management of target species such as bluefin tuna. RFMOs also provide 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 Agricultural Organization's (FAO's) Code of Conduct for Responsible Fisheries¹ established in 1995.

Another issue of particular concern for NOAA Fisheries is illegal, unreported, and unregulated (IUU) fishing activities in international waters. IUU fishing generally refers to fishing conducted in violation of national laws or internationally agreed conservation and management measures in effect in oceans around the world. IUU fishing can include fishing without a license or quota for certain species, unauthorized transshipments to cargo vessels, failing to report catches or making false reports, keeping undersized fish or fish that are otherwise protected by regulations, fishing in closed areas or during closed seasons, and using prohibited fishing gear. Experts estimate that the global value of economic losses from IUU fishing range between \$10

¹Fishery management plans and fishery ecosystem plans for each region covered in this report are listed in their respective sections. The Caribbean region and its four FMPs are not currently included in this report. These FMPs are developed by the Caribbean Fishery Management Council (San Juan, Puerto Rico). In addition, the Atlantic Highly Migratory Species FMP is not listed in this report. This FMP is developed by the Office of Sustainable Fisheries at NOAA Fisheries Headquarters (Silver Spring, MD).

¹2012 Status of Stocks. The NOAA Fisheries Office of Sustainable Fisheries. http://www.nmfs.noaa.gov/sfa/statusoffisheries/2012/2012_SOSTC.pdf
¹http://www.nmfs.noaa.gov/sfa/reg_s_vcs/Council%20stuff/council%20orientation/2007/2007TrainingCD/TabR-International/RFMOinformation_Oct07.pdf

¹<http://www.fao.org/docrep/005/v9878e/v9878e00.HTM>

¹<http://www.mrag.co.uk/Documents/ExtentGlobalIllegalFishing.pdf>.

billion and \$23.5 billion annually, representing between 11 and 26 million tons¹. NOAA Fisheries is actively working bilaterally and multilaterally with other nations on the adoption of strategies to reduce the level of IUU fishing around the world. Such strategies include strengthening enforcement and data collection programs around the world, and restrict port entry and access to port services to vessels included on the IUU lists of RFMOs with U.S. membership.

Threatened and Endangered Species

NOAA Fisheries is also the lead agency for the conservation and protection of marine and anadromous species that fall within the purview of the Endangered Species Act (ESA). Currently, NOAA Fisheries has jurisdiction over 94 marine and anadromous listed species, and a list, by species group, is provided below.

Endangered and Threatened Species under NMFS Jurisdiction

Species Group	Number of Species
Marine and Anadromous Fish	44
Marine Mammals: Whales	29
Marine Turtles	16
Marine Invertebrates and Plants	5
Total	94

In addition to the threatened and endangered marine and anadromous species, NOAA Fisheries also engages in activities for candidate and proposed species. Candidate species are those petitioned species that are actively being considered for listing as endangered or threatened under the ESA, as well as those species for which NOAA Fisheries has initiated a status review that it has announced in the Federal Register. Proposed species are those candidate species that were found to warrant listing as either threatened or endangered and were officially proposed as such in a Federal Register notice after the completion of a status review and consideration of other protective measures. Currently there are 18 candidate species for listing, and 75 proposed species for listing.

NOAA Fisheries is also responsible for providing protection for marine mammals under the Marine Mammal Protection Act¹. Enacted in 1972, Congress recognized that marine mammal species or stocks may be in danger of extinction or depletion as a result of human activities; marine mammal species or stocks should not be allowed to fall below their optimum sustainable population levels; measures should be taken to replenish marine mammal species or stocks; there is inadequate knowledge of the marine mammal ecology and population dynamics; and marine mammals have proven to be resources of great international significance. NOAA Fisheries engages in activities such as preventing the harassment, capture, or killing of marine mammals, preparing marine mammal stock assessments, and studying interactions between marine mammals and fisheries.

Essential Fish Habitats

Sustainable commercial and recreational fisheries depend on healthy habitats. These habitats include rivers, estuaries, and the open ocean where marine and anadromous species feed, grow, and reproduce. Consideration of these habitat areas are part of an ecosystem-based management approach for managing fisheries in a more sustainable and holistic manner. Since 1996, federal fishery management plans are required to identify and describe essential fish habitat (EFH) for all federally-managed species¹. 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 activities.

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 there is detailed information on ecological function and habitat vulnerability, indicating a greater need for conservation and management. To date, approximately 100 HAPCs have been designated including specific coral, seamount, and spawning areas. A recent effort undertaken by the NOAA Fisheries was to create a Habitat Assessment Improvement Plan¹ 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. NOAA Fisheries is currently implementing several different types of catch share programs such as limited access privilege programs (LAPPs), which include individual fishing quota programs (IFQs), regional fishery associations, and fishing community quotas¹; community development quota programs (CDQs); fishing cooperatives; and sector allocation programs¹.

In 2010, the NOAA catch shares policy¹ was released to encourage well-designed catch share programs to help maintain or rebuild fisheries, and sustain fishermen, communities and vibrant working waterfronts, including the cultural and resource access traditions that have been part of this country since its founding.

Catch share programs are helping to improve economic efficiency and encourage more sustainable fishing practices. They are also designed to produce more fish at lower costs, improve fishermen's safety and profits, and strengthen the biological and economic benefits in a fishery. Catch share programs are a unique fishery management tool because they dedicate a secure share of fish to individual fishermen, fishing cooperatives, or fishing communities.

¹The U.S. Fish and Wildlife Service provides protection for walrus, manatees, otters, and polar bears.

¹The 1996 reauthorization of the Magnuson-Stevens Fishery-Conservation and Management Act included this requirement.

¹The Habitat Assessment Improvement Plan is available at: <http://www.st.nmfs.noaa.gov/st4/documents/habitatAssesmentImprovementPlan052110.PDF>

¹See Section 303(A) of the Magnuson-Stevens Act for more information.

¹For more information about LAPPs and other catch share programs, please see Excess Harvesting Capacity in U.S. Fisheries: A Report to Congress available at: http://www.nmfs.noaa.gov/msa2007/docs/042808_312_b6_r_eport.pdf and *National Assessment of Excess Harvesting Capacity in Federally Managed Fisheries* available at: <http://spo.nmfs.noaa.gov/tm/spo93.pdf>.

¹http://www.nmfs.noaa.gov/sfa/domes_fish/catchshare/index.htm

Existing Catch Shares Programs

Region	Program	Year Implemented
Northeast	Mid-Atlantic Surfclam & Ocean Quahog ITQ	1990
	Mid-Atlantic Golden Tilefish ITQ	2009
	Northeast Multispecies Sectors	2010
	Northeast General Category Atlantic Sea Scallop IFQ	2010
Alaska	Western Alaska CSQ	1992
	Alaska Halibut and Sablefish IFQ	1995
	American Fisheries Act Pollock Cooperatives	1999
	Bering Sea and Aleutian Island Crab Rationalization	2005
	Non-pollock Trawl Catcher or Processor Groundfish Cooperatives (Amendment 80)	2008
	Central Gulf of Alaska Rockfish Cooperatives	2012
Southeast	South Atlantic Wreckfish ITQ	1992
	Gulf of Mexico Red Snapper IFQ	2007
	Gulf of Mexico Grouper-Tilefish IFQ	2010
Northwest	Pacific Coast Sablefish Permit Stacking	2001
	Pacific Groundfish Trawl Rationalization Program	2011

Other Market-based Management Tools

Vessel or permit buyback programs are another market-based tool used by fishery managers. Under these programs, fishing vessels or permits are purchased by the government to permanently decrease the number of participants in the fishery to ease fishing-related pressure on marine resources. To date, there have been ten buyback programs instituted nationwide. The cost of seven¹ of these buyback programs totaled of \$397 million. Eighty-five percent of this total cost was funded by loans from the federal government that will be repaid by the commercial fishing industry.

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

Ecolabels are a market-based tool available to improve fisheries sustainability. 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. This ecolabel is intended to inform the consumer or purchaser of the fishery product of this compliance. 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. Marine Stewardship Council (MSC) has one of the most recognizable ecolabeling programs in the world. There are currently 205 fisheries worldwide that meet MSC sustainability standards¹, 19 of which are U.S. fisheries.

U.S. Fisheries with MSC Certification

Region	Fishery	Certified
North Pacific	Alaska Flatfish - Bering Sea and Aleutian Islands	June 2010
	Alaska Flatfish - Gulf of Alaska	June 2010
	Alaska Pacific Cod - Bering Sea and Aleutian Islands	Jan 2010
	Alaska Pacific Cod - Gulf of Alaska	Jan 2010
	Alaska Pollock - Bering Sea and Aleutian Islands	Dec 2010
	Alaska Pollock - Gulf of Alaska	Sept 2010
	American Western Fish Boast Owners Association albacore tuna North Pacific	Mar 2010
	US North Pacific halibut	Apr 2006
	US North Pacific sablefish	May 2006
Pacific	American Albacore Fishing Association Pacific albacore tuna - north	Aug 2007
	American Albacore Fishing Association Pacific albacore tuna - south	Aug 2007
	Oregon Dungeness crab	Dec 2010
	Oregon pink shrimp	Oct 2011
	Pacific hake	Oct 2009
Southeast	Atlantic deep-sea red crab	Sept 2009
	Louisiana blue crab	Mar 2012
Northeast	Maine Lobster trap fishery	Mar 2013
	US Atlantic spiny dogfish	Aug 2012
	US North Atlantic swordfish	Mar 2013

¹This total excludes three buyback programs associated with Northwest Pacific salmon disasters in 1994, 1995, and 1998 because data were not available.

¹<http://www.msc.org/track-a-fishery/fisheries-in-the-program>

Commercial Fisheries

Commercial fishermen in the U.S. harvested 9.6 billion pounds of finfish and shellfish in 2012, earning \$5.1 billion for their catch. Sea scallop (\$559 million) followed by shrimp (\$490 million), Pacific salmon (\$489 million), and American lobster (\$429 million) contributed most to total revenue in the U.S. In terms of pounds landed, walleye pollock (2.9 billion pounds), menhaden (1.8 billion), and Pacific salmon (636 million) comprised over half of total pounds landed in 2012.

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 (611 million pounds) and earned \$441 million for their catch in 2012. Tuna was caught in large numbers in Hawai'i (19 million pounds) and generated \$67 million in landings revenue.

On the East Coast, Maine fishermen contributed most to the total landings of American lobster (127 million pounds) and earned \$340 million for their catch in 2012. In Massachusetts, sea scallop was a major contributor to total revenue, earning \$365 million for 37 million pounds landed. More blue crab was caught in Louisiana (45 million pounds) than any other state, earning fishermen in this state over \$43 million. Louisiana landed over half of the menhaden in 2012 with fisherman landing 1 billion pounds and generating \$65 million in landings revenue.

The highest ex-vessel price per pound in 2012 was for Eastern oyster, which received \$252.43 per pound in New York, \$38.96 per pound in Massachusetts, and \$5.90 per pound in Delaware, with price differences largely attributable to difference in product form. Other key species or groups with high ex-vessel prices included: spiny lobster (\$15.67 per pound in California), sea scallop (\$11.68 per pound in New Hampshire) and bloodworms (\$11.35 per pound in Maine).

In the Gulf of Mexico, shrimp is a highly valued species. Fishermen in Texas earned \$160 million for their catch (69 million pounds). Louisiana fishermen landed 102 million pounds worth about \$148 million. The ex-vessel price in Texas (\$2.31) was greater than that in Louisiana (\$1.44). The higher price is due to differences in product form; the Texas fleet targets larger shrimp caught in off-shore areas.

Commercial Fisheries Facts

Landings revenue

- The ten key U.S. key species or species groups accounted for 61% of total landings revenue in 2012.
- Finfish and other fishery products (\$2.4 billion) contributed slightly less than shellfish (\$2.7 billion) to total landings revenue in the U.S. in 2012.
- Together, Pacific salmon and walleye pollock accounted for 35% of total finfish revenue.
- Sea scallop, shrimp, and American lobster earned the most in shellfish revenue in 2012, contributing 20.7% 18.2%, and 15.9%, respectively.
- Pacific salmon had the largest one-year increase in landings revenue over the 10 year time period, increasing 52% from \$199 million in 2003 to \$303 million in 2004.
- Pacific halibut had the largest decrease in landings revenue over the 10 year time period, decreasing 35% from \$218 million in 2008 to \$141 million in 2009.

Landings

- The U.S. key species and species groups accounted for 63% of total landings in 2012.
- Finfish and other fishery products accounted for 86% of total U.S. landings in 2012 or 8.3 billion pounds.
- Walleye pollock and menhaden contributed 34% and 21%, respectively, to U.S. finfish landings.
- Shrimp and blue crab contributed 23% and 14%, respectively, to shellfish landings.
- Walleye pollock had the largest one-year increase in landings over the 10 year time period, increasing 44% from 1.9 billion pounds in 2010 to 2.8 billion pounds in 2011.
- Pacific salmon had the largest one-year decrease in landings over the 10 year time period, decreasing 26% from 900 million pounds in 2005 to 664 million pounds in 2006.

Prices

- Of the top ten key species or species groups, sea scallop (\$9.83), Pacific halibut (\$4.48), and sablefish (\$3.42) had the highest ex-vessel price per pound in 2012.
- Walleye pollock (\$0.12) and menhaden (\$0.07) had the lowest ex-vessel price per pound in 2012.
- Pacific halibut had the largest one-year increase in ex-vessel price over the 10 year time period, increasing 56% from \$2.35 per pound in 2009 to \$3.67 in 2010.
- Shrimp had the largest decrease in ex-vessel price over the 10 year time period, decreasing 31% from \$1.79 per pound in 2008 to \$1.24 in 2009.

¹In earlier years, the NMFS Commercial Fishing & Seafood Industry Input/Output Model did not separate out the import sector but rather only included the commercial harvester, seafood processors and dealers, seafood wholesalers and distributors and retail sectors. Note that 2007 and 2008 estimates have been updated using the newer version of the model. For more information, see: www.st.nmfs.noaa.gov/documents/commercial_seafood_impacts_2007-2009.pdf

Economic Impacts¹

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 2012, this industry supported approximately 1.3 million full- and part-time jobs and generated \$141 billion in sales impacts, \$39 billion in income impacts, and \$59 billion in value added impacts.

Commercial Economic Impacts Trends for the United States
(thousands of dollars)

	2009	2010	2011	2012
Jobs	1,029,542	1,196,683	1,233,204	1,270,141
Income	31,556,643	36,269,724	36,568,695	38,721,983
Sales	116,224,548	133,135,986	129,386,335	140,660,993
Value Added	48,282,319	55,434,189	55,321,482	59,017,417
Total Revenue	3,926,583	4,528,964	5,335,522	5,099,456

Seafood retailers, which generated the largest job and value added impacts, contributed 610,000 jobs, \$32 billion in sales impacts, \$12.9 billion in income, and \$17.6 billion in value added impacts to the national economy in 2012. The seafood import sector, which generated the largest sales impacts, contributed 207,000 jobs, \$57 billion in sales impacts, over \$9 billion in income, and \$17.3 billion in value added impacts. Wholesalers and distributors constituted the smallest of the seafood industry sectors and contributed 57,000 jobs, almost \$8 billion in sales, \$2.6 billion in income, and \$3.5 billion in value added impacts to the national economy.

Employment impacts from the U.S. seafood industry were 3% higher in 2012 than in 2011. Similarly, industry-wide economic impacts in terms of income (up 5.9%), sales (up 8.7%), and value added (up 8.7%) were also higher. Year-over-year increases in economic impacts were concentrated in three sectors: importers (employment up 18%), processors and dealers (employment up 11%) and wholesalers and distributors (employment up 5.8%). Economic impacts in the commercial harvesting and retail sectors were actually somewhat lower in 2012 relative to 2011. For example, employment impacts were 6% lower in the commercial harvesting sector and 1.3% lower in the retail sector.

The greatest employment impacts generated by the seafood industry were generated in California with 145,000 jobs, followed by Massachusetts (107,000 jobs), Florida (82,000 jobs), and Washington (61,000 jobs). The lowest number of jobs were supported in Delaware (367 jobs). The highest sales impacts were generated by the seafood industry in California with \$24 billion in sales, followed by Florida (\$17 billion), Massachusetts (\$8.5 billion), and New Jersey (\$7.9 billion). The importers sector generated the highest level of sales impacts in all four states. The lowest sales were generated in Delaware (\$47 million). The greatest value added impacts were generated by the seafood industry in California with \$8.6 billion in sales, followed by Florida (\$5.5 billion), Massachusetts (\$3.4 billion), and Washington (\$3.1 billion). The smallest value added impacts were generated in Delaware (\$16 million).

Jobs supported by the U.S. Seafood Industry (2012)

State	Jobs	State	Jobs
United States	1,270,141	Oregon	16,051
California	145,433	Maryland	15,622
Massachusetts	107,064	Georgia	14,124
Florida	82,141	Hawai'i	10,544
Washington	60,955	Rhode Island	10,509
Alaska	55,890	Alabama	9,947
New York	51,681	North Carolina	8,800
New Jersey	50,754	Mississippi	8,532
Louisiana	33,391	New Hampshire	4,971
Maine	32,971	Connecticut	3,857
Texas	25,911	South Carolina	1,766
Virginia	19,052	Delaware	367

Total sales generated by the U.S. Seafood Industry (2012)
(thousands of dollars)

State	In-State Sales	State	In-State Sales
United States	140,660,993	Maryland	1,800,489
California	24,043,813	Virginia	1,538,449
Florida	16,553,480	Rhode Island	1,224,565
Massachusetts	8,483,740	Oregon	1,174,111
New Jersey	7,921,903	Hawai'i	855,139
Washington	7,533,447	North Carolina	782,684
New York	6,366,436	New Hampshire	609,187
Alaska	4,232,307	Connecticut	603,308
Texas	2,499,832	Alabama	460,514
Georgia	1,962,985	Mississippi	377,374
Louisiana	1,927,986	South Carolina	119,975
Maine	1,875,020	Delaware	46,713

Total value added impacts generated by the U.S. Seafood Industry (2012)

(thousands of dollars)

State	Value Added	State	Value Added
United States	59,017,417	Maryland	686,761
California	8,582,461	Virginia	673,068
Florida	5,532,209	Oregon	550,045
Massachusetts	3,381,475	Rhode Island	468,920
Washington	3,055,370	Hawai'i	382,849
New Jersey	2,871,912	North Carolina	325,893
New York	2,243,446	New Hampshire	232,000
Alaska	2,228,884	Alabama	229,316
Texas	1,036,657	Connecticut	212,505
Louisiana	920,873	Mississippi	193,349
Maine	892,006	South Carolina	57,683
Georgia	717,018	Delaware	15,690

Landings Revenue

Landings revenue in the U.S. totaled \$5.1 billion in 2012. This was a 52% increase (9.2% increase in real terms) from 2003 levels (\$3.3 billion) and a 4.4% decrease (4% decrease in real terms) relative to 2011 (\$5.3 billion). Totalling \$2.4 billion in 2012, finfish revenue experienced a 58% increase (13% increase in real terms) from 2003 to 2012 and decreased 7% (6.7% decrease in real terms) from 2011 to 2012. U.S. shellfish revenue totaled \$2.7 billion in 2012, increasing 47.4% (5.7% increase in real terms) from 2003 to 2012 and decreased 2% (a 1.5% decrease in real terms) from 2011 to 2012.

Total Landings Revenue by Region (2012)
(thousands of dollars)

Region	Total Revenue	Region	Total Revenue
US Total	5,099,456	Pacific	661,994
North Pacific	1,703,726	Mid-Atlantic	488,316
New England	1,191,363	South Atlantic	170,938
Gulf of Mexico	762,514	Western Pacific	91,513

The ten U.S. key species and species groups comprised 61% of total revenue in 2012. Of these, sea scallop, shrimp, Pacific salmon, American lobster, and walleye pollock contributed most to total revenue in the U.S. in 2012. These species or groups totaled approximately \$2.3 billion in 2012 or 45% of total revenue.

Total Landings Revenue by State (2012)
(thousands of dollars)

State	Total Revenue	State	Total Revenue
Alaska	1,703,726	Rhode Island	80,787
Massachusetts	618,247	Maryland	77,859
Maine	448,544	North Carolina	72,912
Louisiana	331,165	East Florida	57,736
Washington	275,585	Mississippi	49,295
California	231,683	Alabama	46,340
Texas	194,044	New York	39,136
New Jersey	187,732	South Carolina	23,978
Virginia	175,640	New Hampshire	23,176
West Florida	141,671	Connecticut	20,608
Oregon	128,030	Georgia	16,315
Hawai'i	91,513	Delaware	7,897

The largest increases in total revenue among the national key species or species groups from 2003 to 2012 were experienced by: Pacific salmon (146%, 76% in real terms), sea scallop (144%, 75% in real terms), and tunas (89%, 35% in real terms).

Four key species or species groups showed decreases in real revenue from 2003 to 2012: blue crab (down 13%), Pacific halibut (down 39%), sablefish (down 5%) and shrimp (down 23%). Relative to 2011 totals, key species or species groups with the largest increases in total revenue in 2012 were: tunas (20%, 21% in real terms), blue crab (4.9%, 5.3% in real terms), and American lobster (1.5%, 2% in real terms). Overall, the greatest

portion of the nation's landings revenue was generated in Alaska (\$1.7 billion), which contributed 33% to the U.S. total. Alaska also contributed more than any other state to total U.S. finfish revenue (\$2.4 billion), accounting for 59% of total finfish revenue. More than half of Alaska's finfish landings revenue came from walleye pollock and salmon. Massachusetts (\$490 million) and Maine (\$372 million) contributed most to total U.S. shellfish revenue, contributing 18.2% and 13.8%, respectively. Sea scallop accounted for most of the revenue generated in Massachusetts and American lobster contributed the most to revenue in Maine.

Landings

In 2012, U.S. commercial fishermen landed 9.6 billion pounds of finfish and shellfish. Relative to 2003 levels, this was an 1.4% increase and a 2.3% decrease relative to 2011 (9.9 billion pounds). Finfish landings totaled 8.3 billion pounds in 2012, a 0.4% decrease from 8.4 billion pounds in 2003 and a 2% decrease from 2011 (8.5 billion pounds).

Total Landings by Region (2012)
(thousands of pounds)

Region	Total Revenue	Region	Total Revenue
US Total	9,637,821	Mid-Atlantic	751,144
North Pacific	5,261,421	New England	664,243
Gulf of Mexico	1,652,446	South Atlantic	107,802
Pacific	1,068,691	Western Pacific	29,289

Over 60% of total catch in 2012 was made up of the ten U.S. key species and species groups. Walleye pollock and menhaden had the highest landings totals in 2012 with 2.9 billion pounds and 1.8 billion pounds landed, respectively. These two species accounted for 48% of total U.S. landings in 2012.

Total Landings by State (2012)
(thousands of pounds)

State	Total Landings	State	Total Landings
Alaska	5,261,421	Maryland	73,415
Louisiana	1,217,453	West Florida	63,032
Virginia	461,944	North Carolina	56,673
California	352,700	New York	30,029
Massachusetts	297,561	Hawai'i	29,289
Oregon	295,892	East Florida	28,565
Mississippi	263,622	Alabama	26,347
Maine	262,581	South Carolina	12,260
Washington	213,578	New Hampshire	12,138
New Jersey	180,502	Georgia	10,304
Rhode Island	83,290	Connecticut	8,673
Texas	81,991	Delaware	5,239

The greatest increases in landings between 2003 and 2012 occurred in American lobster (109%), menhaden (11%), and blue crab (6%). During the same time period, decreases were seen in Pacific halibut (57%), walleye pollock (15%), and sablefish

(14%). The largest increase in landings of key species or groups between 2011 and 2012 was experienced by tunas (19%) and the largest decrease was experienced by Pacific halibut (21%).

Alaskan fishermen harvested the majority of the nation's total landings. Alaska contributed 56% to the U.S. total in 2012, landing 5.3 billion pounds of finfish and shellfish. Alaska also contributed most to the U.S. finfish total, landing 5.1 billion pounds or 62% of the U.S. finfish total. Walleye pollock comprised much of landings in Alaska (55%). More shellfish was landed in California (251 million pounds) and Louisiana (166 million pounds) than any other single state. The landings in these two states comprised 32% of all shellfish landed in the United States in 2012.

Prices

Of the ten U.S. key species and species groups, sea scallop, Pacific halibut, and sablefish received the highest ex-vessel prices in 2012 at \$9.83 per pound, \$4.48 per pound, and \$3.42 per pound respectively.

Significant increases in price were observed for Pacific salmon, which increased 157% (84% in real terms) from 2003 to 2012, but experienced a decrease of 2.5% (2.1% in real terms) from 2011 to 2012. Sea scallop ex-vessel price experienced the next largest change between 2003 and 2012, with an increase of 140% (72% in real terms). The greatest change in price between 2011 and 2012 was experienced by sablefish (19.7% decrease a 19.5% decrease in real terms), followed by blue crab with a 15.4% increase (a 15.9% increase in real terms).

Menhaden and walleye pollock had the lowest ex-vessel prices in 2012 at \$0.07 and \$0.12 per pound, respectively. However, landings of menhaden and walleye pollock were the largest among the U.S. key species and groups: 1.77 billion pounds of menhaden and 2.87 billion pounds of walleye pollock.

Recreational Fisheries

In 2012, there were approximately 11 million recreational saltwater anglers across the U.S. who took 72 million saltwater fishing trips around the country. These anglers spent \$4.6 billion on fishing trips and \$20 billion on durable fishing-related equipment. These expenditures contributed \$58 billion in sales impacts to the U.S. economy, generated \$30 billion in value added impacts, and supported over 381,000 job impacts.

Of the U.S. key recreational species or species groups, seatrout (52 million fish), and Atlantic croaker and spot (31 million fish) were the most often caught by recreational saltwater anglers in 2012.

Key United States Recreational Species

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

Expenditures and Economic Impacts

Economic impacts from recreational fishing activities (impacts from fishing trips and durable equipment combined) supported over 381,000 full- and part-time jobs across the U.S. in 2012. Sales impacts from recreational angling trips and durable expenditures totaled \$58 billion and value added impacts totaled \$30 billion.

Durable equipment impacts contributed most to these totals, accounting for 82% of employment impacts, 82% of total sales impacts, and 81% of value added impacts. Of the three fishing trip modes, private boat-based fishing trips contributed most to the number of jobs supported by recreational angling with 6.9% of employment impacts. For-hire sales (\$2.5 billion) and value added impacts (\$1.5 billion) were approximately half the magnitude of impacts generated by either private boat (\$4.5 billion, \$2.3 billion) or shore-based trips (\$3.7 billion, \$1.9 billion).

Recreational Economic Impacts Trends for the United States (thousands of dollars and trips)

	2009	2010	2011	2012
Jobs	327,124	326,188	363,932	380,898
Income	14,574,464	14,570,210	18,176,957	19,014,945
Sales	49,811,961	49,832,341	55,843,020	58,420,792
Value Added	23,196,423	23,170,932	29,100,691	30,441,884
Total Trips ¹	75,608	73,456	71,322	72,018

U.S. anglers spent a total of \$4.6 billion on expenditures related for fishing trips in 2012. Of this total, expenditures for private boat-based fishing trips contributed the most (\$2 billion), followed by shore-based fishing trips (\$1.6 billion), and for-hire-based fishing trips (\$1.1 billion). Expenditures on fishing-related equipment totaled over \$20 billion in 2012. Anglers spent more on boat expenses (\$10 billion) than any other durable good. Other major expenditures include fishing tackle (\$3.7 billion), vehicle expenses (\$2.6 billion) and second home expenses (\$2 billion).

¹The number of trips is in thousands and excludes Alaska and Texas.

Jobs supported by the U.S. Recreational Fishing Industry (2012)

State	Jobs	State	Jobs
West Florida	75,268	South Carolina	4,095
East Florida	34,073	Washington	3,794
North Carolina	18,202	New York	2,959
Louisiana	16,972	Oregon	2,958
Texas	13,944	Georgia	2,787
New Jersey	13,131	Rhode Island	1,794
California	12,134	Maine	1,664
Virginia	8,143	Mississippi	1,649
Alabama	7,501	Delaware	1,242
Massachusetts	6,942	Hawai'i	1,171
Maryland	5,683	Connecticut	1,137
Alaska	4,824	New Hampshire	442

The greatest employment impacts from expenditures on recreational angling were generated in West Florida with 75,000 jobs, followed by East Florida (34,000 jobs), North Carolina (18,000 jobs), and Louisiana (17,000 jobs). The lowest number of jobs were supported in New Hampshire (442 jobs). The highest sales impacts from expenditures on recreational angling were also generated in West Florida with \$9.1 billion in sales, followed by East Florida (\$4 billion), Louisiana (\$2 billion), and New Jersey (\$2 billion). The lowest sales were generated in New Hampshire (\$48 million).

Total Sales generated by the U.S. Recreational Fishing Industry (2012)*(thousands of dollars)*

State	Sales	State	Sales
West Florida	9,142,920	Washington	494,583
East Florida	4,007,766	South Carolina	383,622
Louisiana	1,964,494	New York	381,299
New Jersey	1,888,249	Oregon	325,880
North Carolina	1,867,621	Georgia	298,791
Texas	1,719,709	Rhode Island	192,367
California	1,701,218	Maine	163,679
Massachusetts	848,039	Connecticut	148,140
Virginia	834,499	Mississippi	143,890
Alabama	691,547	Hawai'i	139,142
Maryland	637,237	Delaware	117,752
Alaska	558,078	New Hampshire	47,926

Participation¹

Nationwide, there were 11 million recreational saltwater anglers who fished in their home states in 2012. Approximately 9.4 million of these anglers were residents of a U.S. coastal county and 1.6 million anglers were residents of a non-coastal county. Between 2003 and 2012, the total number of U.S. anglers fishing in their home states decreased 8.8%. However, the number of anglers increased 3.9% between 2011 and 2012. The number of

coastal county anglers decreased 10% from 2003 to 2012 and increased 3.1% from 2011 to 2012. The number of non-coastal county anglers decreased 0.3% between 2003 and 2012 and from 2011 to 2012, there was a 9.1% increase.

Fishing Trips²

The total number of fishing trips taken in the U.S. decreased 16% from 2003 to 2012. Relative to 2011, total fishing trips taken in the U.S. increased 1% with largest increase occurring in the shore mode (4%)

Harvest and Release

Among the ten key U.S. recreational species or species groups, seatrout, Atlantic croaker and spot, summer flounder, and striped bass were the most commonly caught by anglers in 2012. These species or groups were caught in large numbers relative to the other key species or groups: seatrout (52 million fish), Atlantic croaker and spot (31 million fish), summer flounder (17 million fish), and striped bass (6.9 million fish). Anglers fishing in the Mid-Atlantic and New England caught most of the Atlantic croaker, summer flounder, and striped bass in 2012, while most seatrout were caught in the Gulf of Mexico and the South Atlantic.

In the North Pacific Region, salmon (Chinook, chum, coho, pink, and sockeye) and Pacific halibut were the most commonly caught species or group in 2012 with 724,000 fish and 711,000 fish caught, respectively. Bigeye and mackerel (608,000 fish) comprised 33% of fish caught by anglers in the Western Pacific in 2012.

Recreational catch of striped bass experienced a 61% decrease between 2003 and 2012, the largest change during this 10 year time period. There were 3.3 million sharks caught in 2012. Other key species or groups with large changes in recreational catch include: salmon (39% decrease), seatrout (29% increase), large Atlantic tuna (27% decrease), and Atlantic croaker and spot (22% decrease).

From 2011 to 2012, decreases occurred in the recreational catch of Atlantic croaker and spot, salmon, striped bass, and summer flounder. Of these, the largest decreases occurred in summer flounder (23%), striped bass (18%), and salmon (6%). The largest increase observed for this time period was for large Atlantic tuna, which experienced a 48% increase.

¹Participation estimates do not include Alaska and Texas. Hawai'i is included for 2003-2012; Numbers include the Caribbean.

²Effort numbers do not include Alaska and Texas. They include Hawai'i only for 2003-2011. California numbers were estimated differently from 2004-2012.

Recreational Fishing Facts

Participation

- An average of 12 million anglers fished in United States annually from 2003 to 2012.
- In 2012, coastal county residents made up 86% of total anglers. These anglers averaged 87% of total anglers annually over the 10 year time period.
- The largest annual increase in the number of coastal anglers during the 10 year time period was between 2004 and 2005, increasing 11%, from 10 million anglers to 11 million anglers. The largest one-year decrease during the same period for coastal anglers occurred between 2007 and 2008, decreasing 14%, from 12 million anglers to 11 million anglers.

Fishing trips

- In the United States, an average of 81 million fishing trips were taken annually from 2003 to 2012.
- Private or rental boat and shore-based fishing trips accounted for 36 million and 33 million fishing trips, respectively in 2012. Together, these made up 95.3% of the fishing trips taken in that year.
- The largest increase in number of total trips taken annually over the 10 year time period occurred between 2006 and 2007, increasing 2.8%, from 86 million trips to 89 million trips.
- The largest one-year decrease in total trips taken during this period in total trips taken occurred between 2008 and 2009, decreasing 13%, from 87 million trips to 76 million trips.

Harvest and release

- Seatrout was the most commonly caught key species or species group, averaging 47 million fish caught over the 10 year time period. Of these, 61% were released rather than harvested.
- Of the ten commonly caught key species or species groups, six were released more often than harvested over this time period. The species or species group that was most commonly released was sharks (96% released).
- Salmon (100% harvested), followed by large Atlantic tuna (88% harvested), and rockfishes and scorpionfishes (75% harvested) were key species or groups that experienced the greatest proportion of harvests rather than releases.

Marine Economy³

In 2011, there were 7.4 million establishments throughout the entire U.S economy (including marine and non-marine related establishments). These establishments employed over 113 million full- and part-time employees and had a total annual payroll of \$5.2 trillion. From 2003 to 2011, the number of establishments increased 1.4%, employee numbers increased 0.025%, and total annual payroll increased 28% (a 7.4% increase in real terms) nationwide.

The nation's gross domestic product was \$15 trillion in 2011, a 35% increase (a 3.6% decrease in real terms) relative to 2003

levels (\$11 trillion) and a 4% increase (a 3.3% decrease in real terms) relative to 2010 levels (\$11.1 trillion). Employee compensation in 2003 was \$8.3 trillion, a remained unchanged (a 29% decrease in real terms).

For this report, the marine economy, a subset of the national economy, is comprised of two industry sectors: 1) seafood sales and processing (employer establishments and nonemployer firms) and 2) transport, support, and marine operations (employer establishments). These sectors are comprised of several different marine-related industries. The following sections discuss the contribution of these industries to the national marine economy in terms of the number of establishments or firms, employees, and total annual payroll or receipts.

Seafood Sales and Processing

In 2011, there were 1,757 nonemployer firms engaged in seafood product preparation and packaging, a 69% increase from 2003 levels. Annual receipts increased 58% (13% increase in real terms) from \$70 million (2003) to \$111 million (2011). More of these firms were located in Florida (294 firms), California (187 firms), and New York (142 firms) than any other state.

The number of employer establishments in seafood product and packaging decreased 19% from 764 in 2003 to 620 in 2011. These firms employed approximately 31,000 full- and part-time employees in 2011 and had a total annual payroll of \$1.2 billion. Relative to 2003 levels, this was a 21% decrease in workers and a 1.9% increase (a 27% decrease in real terms) in annual payroll. More than one-third of these establishments were located in Alaska (122 establishments) and Washington (90 establishments).

There were over 2,000 employer establishments involved in seafood wholesale activities in 2011. Almost half of these establishments were in California (404 firms), New York (291 firms), and Florida (250 firms) Establishments in the seafood wholesaling sector employed 20,622 workers and had an annual payroll of \$848 million. From 2003 to 2011, the number of establishments in the seafood wholesale sector decreased 6.9%, the number of employees decreased 11%, and the annual payroll increased 14% (a 19% decrease in real terms).

In 2011, there were 2,514 nonemployer firms engaged in retail seafood sales, a 7.2% increase from 2003 levels. Annual receipts increased 1.2% (28% decrease in real terms) from \$210 million (2003) to \$213 million (2011). More of these firms were located in Florida (362 firms), California (209 firms), and Louisiana (192 firms) than any other state.

The number of employer establishments engaged in seafood retail activities decreased 7.8% from 2,100 in 2003 to 2,000 in 2011. These firms employed approximately 10,000 full- and part-time employees in 2011 and had a total annual payroll of \$223 million. Relative to 2003 levels, this was a 3.3% decrease in workers and a 20% increase (a 15% decrease in real terms) in annual payroll. The employer establishments for retail seafood sales were primarily located in New York (391 firms),

³Information for 2011 is reported in this section; 2012 data were not available for this report.

California (157 firms), and Florida (145 firms). There were just over 2,500 non-employer firms in the retail sector in 2011, many of which were located in Florida (362 firms), California (209 firms), and Florida (192 firms).

Transport, Support, and Marine Operations

In the U.S. transport, support, and marine operations industry sector, marinas had the highest number of establishments. In 2011, there were almost 3,900 marinas that employed 27,000

full- and part-time workers. Compared to 2003 levels, this was a 6.1% decrease in establishment numbers and a 4.9% decrease in number of employees.

Annual payroll for this industry was \$953 million in 2011, a 23% increase (12% decrease in real terms) over 2003 levels. Over half of these marinas were located in New York (431), Florida (411), California (269), New Jersey (206), Massachusetts (176), Maryland (172), and Texas (144).

2012 Economic Impacts of the United States Seafood Industry (thousands of dollars)

	Jobs	Sales	Income	Value Added
Total Impacts	1,270,141	140,660,993	38,721,983	59,017,417
Commercial Harvesters	175,565	13,540,128	4,498,124	6,992,405
Seafood Processors & Dealers	219,523	30,222,606	9,538,057	13,258,966
Importers	207,310	57,026,447	9,139,576	17,384,158
Seafood Wholesalers & Distributors	57,434	7,966,730	2,617,923	3,745,890
Retail	610,310	31,905,082	12,928,302	17,635,998

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total revenue	3,346,066	3,769,942	3,952,692	4,233,299	4,204,578	4,392,127	3,926,583	4,528,964	5,335,522	5,099,456
Finfish & other	1,518,330	1,777,802	1,860,060	2,107,034	2,067,933	2,254,771	1,886,446	2,183,275	2,588,568	2,404,515
Shellfish	1,827,736	1,992,140	2,092,632	2,126,265	2,136,645	2,137,356	2,040,137	2,345,689	2,746,954	2,694,941
American lobster	283,516	374,306	415,415	404,395	368,528	325,122	311,184	404,092	422,794	429,249
Blue crab	153,685	145,905	140,818	126,034	149,163	160,711	163,284	205,957	181,761	190,645
Menhaden	71,988	75,045	62,520	70,553	92,725	90,995	99,104	107,132	143,679	127,733
Pacific halibut	172,846	176,893	177,599	202,131	227,348	217,726	140,613	207,282	213,465	152,403
Pacific salmon	198,946	302,775	330,816	310,865	381,589	395,253	369,744	554,798	618,330	489,068
Sablefish	102,983	94,526	97,077	101,478	99,439	112,806	115,499	126,533	175,986	141,182
Sea scallop	229,097	320,039	432,514	386,341	386,045	370,053	375,569	455,770	585,157	558,809
Shrimp	441,622	446,043	412,718	452,979	429,993	444,578	379,152	409,209	537,173	489,892
Tunas	86,818	89,952	86,358	86,324	93,875	106,867	96,069	108,262	136,143	163,699
Walleye pollock	203,018	271,612	306,906	329,879	297,460	323,212	270,595	282,399	362,592	343,311

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total landings	9,505,337	9,688,745	9,712,427	9,552,024	9,313,573	8,359,716	8,062,089	8,257,443	9,866,014	9,637,821
Finfish & other	8,367,711	8,516,634	8,630,877	8,356,824	8,230,436	7,299,533	6,793,240	6,950,505	8,500,118	8,332,966
Shellfish	1,137,626	1,172,111	1,081,550	1,195,200	1,083,137	1,060,183	1,268,849	1,306,938	1,365,896	1,304,855
American lobster	71,683	90,073	87,809	96,119	81,039	87,749	100,775	117,586	126,224	149,535
Blue crab	170,890	174,561	159,242	166,122	157,080	162,233	176,388	199,765	199,010	181,160
Menhaden	1,590,510	1,495,240	1,243,807	1,306,632	1,484,230	1,344,468	1,570,735	1,473,337	1,875,009	1,770,587
Pacific halibut	78,862	79,181	76,264	71,891	69,967	67,000	59,812	56,467	42,864	33,988
Pacific salmon	669,998	738,746	899,759	663,567	886,054	659,196	705,063	787,712	780,073	635,773
Sablefish	47,998	52,851	51,296	46,842	43,884	43,314	42,826	40,318	41,278	41,292
Sea scallop	55,968	64,108	56,626	60,123	58,450	53,384	57,921	57,540	59,193	56,875
Shrimp	324,170	316,566	264,163	332,491	273,636	248,628	305,701	249,010	311,715	300,264
Tunas	61,762	56,323	44,252	49,826	50,642	47,878	49,062	48,002	49,766	59,448
Walleye pollock	3,361,261	3,353,236	3,410,065	3,400,810	3,066,600	2,276,144	1,866,171	1,947,578	2,810,787	2,872,186

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
American lobster	3.96	4.16	4.73	4.21	4.55	3.71	3.09	3.44	3.35	2.87
Blue crab	0.90	0.84	0.88	0.76	0.95	0.99	0.93	1.03	0.91	1.05
Menhaden	0.05	0.05	0.05	0.05	0.06	0.07	0.06	0.07	0.08	0.07
Pacific halibut	2.19	2.23	2.33	2.81	3.25	3.25	2.35	3.67	4.98	4.48
Pacific salmon	0.30	0.41	0.37	0.47	0.43	0.60	0.52	0.70	0.79	0.77
Sablefish	2.15	1.79	1.89	2.17	2.27	2.60	2.70	3.14	4.26	3.42
Sea scallop	4.09	4.99	7.64	6.43	6.60	6.93	6.48	7.92	9.89	9.83
Shrimp	1.36	1.41	1.56	1.36	1.57	1.79	1.24	1.64	1.72	1.63
Tunas	1.41	1.60	1.95	1.73	1.85	2.23	1.96	2.26	2.74	2.75
Walleye pollock	0.06	0.08	0.09	0.10	0.10	0.14	0.15	0.15	0.13	0.12

2012 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

	Jobs	Sales	Income	Value Added
Trip Impacts by Fishing Mode:				
For-Hire	18,587	2,546,961	995,199	1,542,836
Private Boat	26,232	4,493,442	1,287,960	2,267,146
Shore	24,534	3,714,039	1,098,985	1,894,850
Total Durable Equipment Impacts	311,545	47,666,350	15,632,801	24,737,052
Total State Trip and Durable Equipment Economic Impacts	380,898	58,420,792	19,014,945	30,441,884

2012 Angler Trip & Durable Expenditures (thousands of dollars)¹

Fishing Mode	Trip Expenditures		Equipment	Durable Expenditures
	Non-Residents	Residents		
For-Hire	NA	1,050,120	Fishing Tackle	3,734,317
Private Boat	NA	2,002,425	Other Equipment	1,487,342
Shore	NA	1,582,867	Boat Expenses	10,089,212
<i>total</i>	NA	4,635,413	Vehicle Expenses	2,552,889
			Second Home Expenses	1,979,856
			<i>Total Durable Equipment Expenditures</i>	19,843,616
Total State Trip and Durable Equipment Expenditures				24,479,029

Recreational Anglers by Residential Area (thousands of anglers)²

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Coastal	10,434	10,199	11,330	11,644	12,219	10,533	9,268	9,375	9,099	9,384
Non-Coastal	1,562	1,579	1,492	1,685	1,616	1,591	1,747	1,502	1,428	1,558
Total Anglers	11,996	11,779	12,822	13,329	13,835	12,124	11,015	10,877	10,527	10,941

Recreational Fishing Effort by Mode (thousands of angler-trips)²

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
For-Hire	3,368	3,543	3,633	3,902	4,333	3,567	3,404	2,725	3,346	3,406
Private	46,022	45,016	44,203	43,712	47,369	45,818	38,569	38,627	36,281	35,635
Shore	36,200	38,019	37,343	38,693	37,025	37,219	33,635	32,104	31,695	32,977
Total Trips	85,590	86,578	85,179	86,307	88,727	86,604	75,608	73,456	71,322	72,018

Harvest (H) and Release (R) of Key Species Species Groups (thousands of fish)³

		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Drum (Atlantic croaker and spot)	H	20,879	19,796	20,356	22,936	26,567	24,018	15,765	13,356	13,319	11,951
	R	18,199	17,819	23,758	19,378	21,369	24,975	20,371	15,978	18,092	18,621
Drum (seatrouts)	H	15,228	16,953	16,099	18,903	17,563	21,077	20,189	16,739	22,240	20,881
	R	25,549	27,216	30,629	30,345	28,976	32,354	25,807	23,937	28,649	31,557
Little tunny & Atlantic bonito ⁴	H	252	407	182	313	295	203	233	190	283	386
	R	864	1,101	468	869	1,220	725	808	598	701	853
Pacific halibut	H	403	483	500	463	585	516	440	398	394	388
	R	290	369	380	353	438	359	321	304	311	324
Rockfishes & scorpionfishes	H	3,742	2,595	3,616	2,677	2,453	2,067	2,200	2,418	3,084	3,589
	R	1,796	984	1,348	896	691	636	838	735	680	1,032
Salmon	H	1,479	1,432	1,419	821	1,231	695	1,466	699	958	899
	R	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Sharks ⁵	H	171	149	205	135	150	111	130	161	102	93
	R	2,795	3,063	3,988	3,520	3,961	4,127	3,986	4,026	2,577	3,177
Striped bass	H	2,580	2,621	2,491	2,741	2,449	2,345	1,994	1,977	2,250	1,509
	R	14,997	17,479	18,229	23,418	16,220	12,697	8,118	6,357	6,177	5,384
Summer flounder	H	4,579	4,390	4,105	4,035	3,110	2,363	1,828	1,510	1,845	2,277
	R	15,977	16,059	21,868	17,511	17,626	20,547	22,297	22,227	19,724	14,255
Tunas (large Atlantic species) ⁶	H	891	774	669	567	730	798	528	595	423	676
	R	113	134	110	137	96	89	55	53	68	52

¹All anglers reported in this table are U.S. residents; NA = not applicable²Information was included for all states but Alaska and Texas. Most information was provided by the Marine Recreational Information Program (MRIP). Pacific data were provided by the Pacific states. Hawaii participation estimates are not available for 2007-2012.³This table excludes all Texas harvest and release.⁴This species may not be equivalent to species with similar names listed in the commercial tables.⁵Sharks include species within the requiem shark family, blacktip sharks, Atlantic sharpnose sharks, and unidentified sharks.⁶Includes all tunas in the thunnus family.

United States' State Economy (% of national total)

	Establishments	Employees	Annual Payroll (million \$)	Employee Compensation (million \$)	Gross State Product (million \$)	Commercial Location Quotient ⁷
2003	7,254,745	113,398,043	4,040,889	6,368,258	11,067,829	1
2011	7,354,043	113,425,965	5,164,898	8,273,723	14,959,778	1
%change	1.37 %	0.02 %	27.82 %	29.92 %	35.16 %	--

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Firms	1,038	1,110	1,080	1,142	1,303	1,308	1,383	1,617	1,757
	Receipts	70,071	81,871	78,745	80,066	88,230	89,670	92,358	104,990	110,745
Seafood sales, retail	Firms	2,346	2,260	2,098	2,089	2,610	2,522	2,407	2,513	2,514
	Receipts	210,231	210,450	203,951	211,186	231,776	233,002	198,495	199,810	212,679

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Establishments	764	734	717	670	685	663	645	638	620
	Employees	39,580	38,102	37,684	35,894	33,169	33,323	30,894	31,789	31,261
	Payroll	1,177,582	1,151,780	1,180,396	1,205,890	1,196,086	1,161,637	1,091,727	1,116,305	1,200,263
Seafood Sales, wholesale	Establishments	2,456	2,330	2,314	2,222	2,438	2,063	2,099	2,183	2,287
	Employees	23,091	22,501	22,666	22,013	24,232	20,116	19,290	19,386	20,622
	Payroll	743,479	771,749	781,459	826,720	924,654	782,178	758,332	798,794	848,454
Seafood sales, retail	Establishments	2,125	2,151	2,155	2,115	2,094	2,044	1,967	1,982	1,972
	Employees	10,346	10,714	10,381	10,545	10,380	9,732	9,439	9,857	10,006
	Payroll	186,087	192,187	194,602	200,971	209,404	205,423	211,264	219,045	222,508

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Coastal & Great Lakes freight transportation	Establishments	606	579	610	579	573	513	513	547	549
	Employees	22,449	21,928	21,025	22,172	22,568	21,019	20,919	17,528	18,590
	Payroll	1,183,071	1,179,549	1,232,342	1,376,033	1,552,467	1,694,613	1,470,159	1,288,001	1,400,267
Deep sea freight transportation	Establishments	472	435	465	456	427	365	376	372	378
	Employees	12,175	11,314	11,357	11,473	11,308	10,231	11,180	10,288	10,362
	Payroll	734,781	735,804	801,863	825,752	855,683	852,063	863,363	867,797	921,990
Deep sea passenger transportation	Establishments	99	83	87	87	92	71	78	56	55
	Employees	12,093	12,017	11,376	11,387	0	0	0	0	0
	Payroll	541,131	652,443	628,793	667,949	ND	ND	ND	ND	ND
Marinas	Establishments	4,150	4,092	4,143	4,025	4,085	3,972	3,891	3,937	3,896
	Employees	27,928	28,100	27,511	28,339	28,788	28,686	26,643	26,657	26,557
	Payroll	773,538	814,821	839,848	894,097	945,355	954,032	905,488	927,499	953,497
Marine cargo handling	Establishments	542	551	549	540	552	532	541	507	545
	Employees	50,644	58,618	59,670	61,905	62,941	63,736	56,386	57,275	59,517
	Payroll	2,422,537	2,899,703	3,034,672	3,261,953	3,428,126	3,272,723	2,776,791	3,026,861	3,159,964
Navigational services to shipping	Establishments	782	804	803	802	830	868	846	847	836
	Employees	11,795	11,881	10,819	12,043	12,997	13,419	12,689	13,529	13,441
	Payroll	629,541	591,510	584,689	699,375	756,552	847,938	826,384	937,980	893,889
Port & harbor operations	Establishments	223	234	244	229	223	268	258	287	255
	Employees	6,413	6,888	7,453	7,002	6,573	5,608	5,100	4,844	4,933
	Payroll	279,970	300,692	319,338	323,554	318,608	282,671	250,358	290,467	306,882
Ship & boat building	Establishments	1,739	1,793	1,799	1,764	1,771	1,782	1,615	1,540	1,497
	Employees	133,395	137,633	141,620	142,057	148,864	157,512	137,759	127,691	127,522
	Payroll	5,119,596	5,499,783	5,654,818	5,877,830	6,405,570	7,269,306	6,674,187	6,529,523	6,845,322

⁷The U.S. Commercial Fishing Location Quotient (CFLQ) of 1.0 represents the national baseline from which states CFLQs can be compared.

ND- these data are confidential and therefore not available

NA- these data are not available