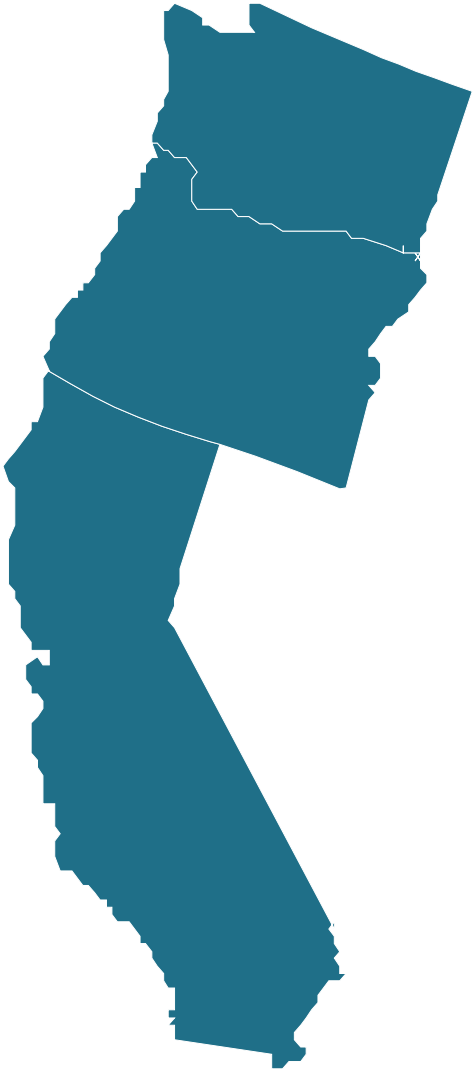
Pacific

- California
- Oregon
- Washington



Management Context

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

Pacific Region FMPs

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

Of the stocks or stock complexes covered in these fishery management plans, five are currently listed as overfished: canary rockfish, cowcod, Pacific ocean perch, chinook salmon (one stock), and yelloweye rockfish. Two stock complexes are currently subject to overfishing: bigeye tuna and Pacific Bluefin tuna. Interesting management techniques are employed in the Pacific Region's fisheries. For example, the Pacific groundfish and salmon fisheries are subject to 'weak stock management', where access to the harvestable surplus of healthier stocks is often restricted to protect weaker stocks with which they co-mingle in the ocean. These weaker stocks include seven rebuilding groundfish stocks, salmon listed under the Endangered Species Act, and other non-listed stocks that also constrain the fishery.

Salmon management is further complicated by the need to ensure equitable allocation of harvest among diverse user groups and to coordinate with other entities that have jurisdiction over other aspects of salmon management. Decades of habitat modification, hatchery practices, harvest, and growing competition for water have affected the viability of salmon stocks and made them more vulnerable to adverse environmental conditions including the prolonged drought and adverse ocean conditions experienced in recent years. Low returns of salmon to the Klamath River in 2006 and to the Sacramento River in 2008 and 2009 resulted in unprecedented closures of ocean and in-river fisheries and federal disaster relief to affected entities. Fishing rebounded in 2010-2012 but remains below the levels prior to the closures.

Coastal pelagic species (CPS) are highly variable, environmentally sensitive stocks that provide forage for marine mammals, birds, and fish. These species include Pacific sardine, northern anchovy, Pacific and jack mackerel, and market squid. Of these, Pacific sardine is the most commonly targeted CPS finfish and is managed via an innovative harvest control rule whereby allowable harvest varies with sea surface temperature. Because the geographic range of sardine tends to expand with abundance, harvest allocation between California and Pacific Northwest fisheries is an ongoing and dynamic issue.

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

The annual sardine harvest guideline is allocated coast-wide on a seasonal basis. Recent decreases in harvest guideline limits have contributed to the development of an intense derby fishery.

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

Market-based management tools are used by fishery managers to reduce overcapitalization, increase the economic viability of fisheries, and promote individual accountability for harvest and harvesting practices. Limited access privilege programs (LAPPs) and other catch share programs comprise a category of such tools. For example, in 2001, the PFMC implemented the Pacific sablefish permit stacking program, whereby vessels are allowed to stack multiple vessel permits on a single vessel in order to improve economic efficiency through rationalization of the fixed gear fleet, increase benefits for fishing communities, promote equity, mitigate reallocation effects of previous harvest regulations, promote safety, and improve product quality and value. The results from this program show that the number of entities holding shares and number of active vessels decreased, while revenue per vessel and total revenue increased.

More recently (2011), the PFMC implemented the Pacific trawl rationalization program that involves individual fishing quotas (IFQs) for non-whiting groundfish and whiting trawlers, and coops for whiting mothership and catcher processor sectors, that was implemented in January 2011. The objectives of this programs are to provide a mechanism for total catch accounting; provide for a viable, profitable and efficient groundfish; promote practices that reduce bycatch and discard mortality and minimize ecological impacts; increase operational flexibility; minimize adverse effects from IFQ Program on fishing communities and other fisheries; promote measurable economic and employment benefits through the seafood catching, processing, distribution elements, and support sectors of the industry; provide quality product for the consumer; and increase safety in the fishery. Results from this program show that the number of active vessels declined while whiting price, total landings, revenue per vessel, and total revenue increased.

Ecolabels are another market-based management tool that is intended to encourage fishermen to adopt harvest practices that are considered sustainable by an organization such as the Marine Stewardship Council (MSC). The Oregon pink shrimp fishery, Pacific hake midwater trawl, the American Albacore Fishing Association albacore tuna fishery, and the Oregon dungeness crab fishery have received certifications from the MSC.

Commercial Fisheries

In 2012, commercial fishermen in the Pacific Region landed roughly 1.1 billion pounds of finfish and shellfish, earning $662 million in landings revenue. Landings revenue was dominated by crab ($177 million) and other shellfish ($138 million). These species groups commanded ex-vessel prices of $3.35 and $5.25 per pound, respectively, and comprised 48% of total landings revenue, but only 7.4% of total landings in the Pacific Region.

Washington had the highest landings revenue in the region with $276 million in 2012, followed by California ($232 million) and Oregon ($128 million). In terms of pounds landed, California contributed the most (353 million pounds), followed by Oregon (296 million pounds) and Washington (214 million pounds).

Key Pacific Region Commercial Species

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

Economic Impacts[1]

In 2012, the Pacific Region's seafood industry generated $24 billion in sales impacts in California, $1.2 billion in sales impacts in Oregon, and $7.5 billion in sales impacts in Washington. California also generated the largest income, value added, and employment impacts ($5.2 billion; $8.6 billion; 145,000 jobs). The smallest income impacts were generated in Oregon ($385 million) and the smallest employment impacts were also generated in Oregon (16,000 jobs).

The sector that generated the greatest employment impacts in California was the importers sector (66,000 jobs) followed by the retail sector with 57,000 jobs. In Washington the retail sector (21,000 jobs) generated the largest employment impacts, followed by the seafood processors & dealers sector (16,000 jobs). In Oregon the retail sector (8,200 jobs) generated the largest employment impacts, followed by the commercial harvesters sector (4,400 jobs). The importers sector contributed more to the total value added impacts than any other single sector in California and Washington. In California, the importers sector generated $5.5 billion, followed by the retail sector with $1.7 billion in value added impacts. The commercial harvester sector generated a larger portion (25%) of total state value added impacts in Oregon, than in any other state in the Pacific Region. In Washington, other than the importers sector, the seafood processors and dealers sector contributed the most to value added impacts (25%).

Landings Revenue

Landings revenue in the Pacific Region totaled $662 million in 2012. This was a 56% increase (a 12% increase in real terms) from 2003 levels ($423 million) and a 6.6% decrease (a 6.2% decrease in real terms) relative to 2011 ($709 million). Totaling $416 million in 2012, shellfish revenue experienced a 56% increase (a 12% increase in real terms) from 2003 to 2012 and experienced a 7.2% decrease (6.8% decrease in real terms) from 2011 to 2012.

Hake and squid had the highest annual landings in the Pacific Region in 2012, with 347 million pounds and 215 million pounds, respectively. Although they together accounted for 53% of the total landings in the Pacific Region, they only accounted for 17% of the total landings revenue generated in 2012.

Commercial Fisheries Facts

Landings revenue

- On average, between 2003 and 2012, the key species or species groups accounted for 92% of total revenue, generating $472 million in the Pacific Region.
- Crab had higher landings revenues than any other species or species group, averaging $133 million in landings revenue from 2003 to 2012.
- Squid had the largest one-year increase in landings revenue over the 10 year time period, increasing 114% from $27 million in 2008 to $57 million in 2009.
- Hake had the largest one-year decrease in landings revenue over the 10 year time period, decreasing 76% from $58 million in 2008 to $14 million in 2009.

Landings

- Key species or species groups contributed an average of 76% annually to total landings between 2003 and 2012.
- Hake (whiting), contributed the most to landings in the region, averaging 435 million pounds from 2003 to 2012.
- Squid had the largest one-year increase in landings over the 10 year time period, increasing 141% from 85 million in 2008 pounds to 206 million pounds in 2009.
- Hake had the largest one-year decrease in landings over the 10 year time period, decreasing 52% from 531 million pounds in 2008 to 253 million pounds in 2009.

Prices

- Other shellfish had the highest average annual ex-vessel price per pound ($4.29) over the time period, followed by crab ($2.16), and sablefish ($2.01).
- Hake (whiting) had the lowest average annual ex-vessel price per pound ($0.08) over the time period, followed by squid ($0.26), and flatfish ($0.42).
- Salmon had the largest one-year increase in ex-vessel price over the 10 year time period, increasing 116% from $0.74 per pound in 2009 to $1.60 in 2010.
- Salmon had the largest decrease in ex-vessel price over the 10 year time period, decreasing 48% from $1.42 per pound in 2008 to $0.74 in 2009.

Between 2003 and 2012, the greatest changes in landings were experienced by squid (increasing 117%), shrimp (increasing 70%), and salmon (decreasing 38%). In the short term, between 2011 and 2012 the largest changes were experienced by salmon

[1]The NMFS Commercial Fishing Industry Input/Output Model was used to generate the impact estimates (see NMFS Commercial Fishing & Seafood Industry Input/Output Model, available at: `www.st.nmfs.noaa.gov/documents/commercial_seafood_impacts_2007-2009.pdf`)

(decreasing 42%), hake (decreasing 30%), and albacore tuna (increasing 26%). In terms of finfish, Washington contributed the most ($91 million) followed by Oregon ($72 million), and California ($56 million). Shellfish landings revenue was also dominated by Washington, which contributed the most ($184 million) followed by California ($176 million), and Oregon ($56 million).

Crab and other shellfish had the highest landings revenue in the Pacific Region in 2012, with $177 million and $138 million, respectively. Together they accounted for 48% of the total landings revenue generated in 2012. Between 2003 and 2012, the landings revenue for crab increased 35% and increased 54% for other shellfish.

From 2003 to 2012, species or species groups with large changes in landings revenue include hake (increased 174%), squid (increased 152%), and albacore tuna (increased 88%). Species or species groups with large changes in landings revenue between 2011 and 2012 include sablefish (decreasing 37%), other shellfish (decreasing 14%), and salmon (decreasing 11%).

Between 2008 and 2009, hake experienced a 76% decrease in landings revenue from $58 million to $14 million (a 76% decrease in real terms). A major driver of this decrease was the 52% reduction in landings resulting from a forecast of lower stocks and rockfish bycatch restrictions. Other drivers of this decrease in revenue include international economic conditions and the conditions in fisheries which produce product closely related to hake such as walleye pollock.

Landings

Fishermen in the Pacific Region landed 1.1 billion pounds of finfish and shellfish in 2012. This was a 7.5% increase from the 994 million pounds landed in 2003 but a 9.1% decrease from the 1.2 billion landed in 2011. Finfish landings contributed 67% of total landings in the Pacific Region (719 million pounds) in 2012. From 2011 to 2012, finfish landings experienced a 4.9% decrease. Over the same time period, shellfish landings experienced a 17% decrease from 418 million pounds in 2011 to 349 million in 2012 and a 47% increase from 237 million pounds in 2003.

Prices

The ex-vessel prices for the Pacific Region's key species and species groups in 2012 were higher than their 10 year average for eight of the key species (six of the species in real terms). Ex-vessel prices for salmon and hake experienced the biggest increases between 2003 and 2012, increasing 150% (79% in real terms) and 130% (67% in real terms), respectively. Relative to the ex-vessel prices in 2011, the Pacific Region's salmon experienced the greatest increase (52.3%, 53% in real terms) from $1.28 in 2011 to $1.95 in 2012; sablefish experienced the greatest decrease (23%, 23% in real terms) from $3.17 to $2.43.

In California, the species or species group with the largest change in ex-vessel price from 2003 to 2012 was salmon (170% increase, 94% increase in real terms) from $1.66 to $4.49. The largest change in ex-vessel price experienced in Oregon was for Hake (whiting) (180% increase, 101% increase in real terms from $0.05 to $0.14 and in Washington the largest change in ex-vessel price was experienced by salmon (267% increase, 163% increase in real terms from $0.39 to $1.43).

Recreational Fishing

In 2012, almost 1.6 million recreational anglers took 7.4 million fishing trips in the Pacific Region. Over 72% of these anglers were residents of a regional coastal county. Of the total saltwater fishing trips taken, 24% of them were taken from a private or rental boat and another 67% were shore-based.

Economic Impacts and Expenditures[2]

The contribution of recreational fishing activities in the Pacific Region are reported in terms of economic impacts at the state level (employment, sales, income, and value added impacts) and expenditures on fishing trips and durable equipment at the regional level. Employment impacts in California were the highest in the region with over 12,000 full- and part-time employment impacts generated by recreational fishing activities in the state. Washington (3,800 jobs), and Oregon (3,000 jobs) followed in terms of employment impacts generated by recreational fishing activities.

Key Pacific Region Recreational Species

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

In addition to employment impacts, the contribution of recreational fishing activities to Pacific Region's economy can be measured in terms of sales impacts and the contribution of these activities to gross domestic product (value added impacts). In 2012, sales impacts were also the highest in California ($1.7 billion in sales impacts), followed by Washington ($495 million), and Oregon ($326 million). In California, shore-based fishing trips had the highest employment impacts relative to the other fishing models; in Oregon and Washington, private boat fishing trips contributed the most to employment impacts.

Throughout the Pacific Region, most of the employment impacts in 2012 were generated by expenditures on durable equipment: 81% in Oregon, 72% in Washington, and 65% in California. In the same year value added impacts were the highest in California ($1 billion in value added impacts), followed by Washington ($292 million), and Oregon ($199 million).

[2]Expenditure estimates were generated from the 2011 National Marine Recreational Fishing Expenditure Survey. Economic impacts from recreational fishing activities were generated using the NMFS Recreational Economic Impact Model (see The Economic Contribution of Marine Angler Expenditures in the United States, 2006, available at:http://www.st.nmfs.noaa.gov/economics/publications/marine-angler-expenditures/marine-angler-2006)

The total saltwater fishing trip and durable equipment expenditures were $1.8 billion across the Pacific Region in 2012. Approximately 64% of these expenditures were related to durable equipment purchases. The greatest expenditures were for boat expenses ($504 million), followed by fishing tackle ($336 million), and vehicle expenses ($163 million). Fishing trip related expenditures by Pacific Region's non-residents totaled over $41 million of which the greatest portion can be attributed to for-hire-based fishing trips ($25 million). Residents of the Pacific Region spent $613 million on trip-related expenses with the majority of these expenses related to shore trips ($290 million).

Participation

There were 1.6 million recreational anglers who fished in the Pacific Region in 2012. This was a 17% decrease from 2003 (2 million anglers). These anglers were Pacific Region residents from either a coastal (1.2 million anglers) or non-coastal county (468,000 anglers). Over 72% of total anglers in 2012 were residents of a coastal county. Coastal county angler participation in 2012 experienced a 18% decrease relative to 2003 (1.4 million anglers) and experienced a 10% increase between 2011 and 2012. Non-coastal county angler participation experienced a 13% decrease relative to 2003 (538,000 anglers) and experienced a 20% increase relative to 2011 (390,000 anglers).

Fishing Trips

Recreational fishermen took 7.4 million fishing trips in the Pacific Region in 2012. This was a 11% decrease from 2003 (8.3 million trips) and was 1.3 million more trips than were taken in 2011. Of the total trips taken in the Pacific Region in 2012, approximately 67% of the trips were shore based (5 million trips). The other most popular mode of fishing was private or rental boat based with 1.8 million trips in 2012.

Harvest and Release

The Pacific region's species and species groups caught most frequently in 2012 were rockfishes and scorpionfishes (4.3 million fish), surfperches (2.4 million fish), mackerel (1.2 million fish), and barracuda, bass and bonito (1.1 million fish) in 2012. Between 2003 and 2012, NA of the Pacific Region's key species or species groups showed decreases in catch totals. Key species or groups with the largest decreases were barracuda, bass and bonito (80%), croakers (70%), and greenlings (58%).

Marine Economy[1]

Across all sectors of the economy in California, Oregon, and Washington nearly 16 million full- and part-time employees were employed by about 1.1 million establishments in 2011. Annual payroll totaled $838 billion. Total employee compensation in the Pacific region totaled $1.3 trillion and the combined gross state product of all states totaled about $2.5 trillion. In 2011, the commercial fishing location quotient (CFLQ) for Washington was the highest in the region at 11.90. Washington's CFLQ suggests that the level of employment in commercial fishing-related industries in this state is approximately 11.90 times higher than the level of employment in these industries nationwide. The 2011 CFLQ in Oregon was second highest in the region at 3.54.

Seafood Sales and Processing

In 2011, there were 240 nonemployer firms engaged in seafood product preparation and packaging across the Pacific region, with California (187 firms) accounting for the vast majority of nonemployer firms. Nonemployer firms in the seafood product preparation and packaging sector in the Pacific region had recepts totaling $14 million in 2011. The number of employer establishments in this sector decreased 15% from 189 in 2003 to 160 in 2011. The largest number of employer establishments (90) engaged in seafood product preparation and packaging was located in Washington. The number of employees in the seafood product preparation and packaging sector decreased 16% from 9,584 employees in 2003 to 8,034 in 2011. Payroll in this sector was $386 million in 2011 , an 18% decline from 2003.

There were 538 seafood wholesale establishments in the Pacific region in 2011, a decrease of 29% from 2003. Most of these firms were in the located in California. There were 4,416 employees in the seafood wholesale sector across the region in 2011 with annual payroll of $195 million.

Nonemployer firms engaged in seafood retail sales in the Pacific region totaled 259 in 2011, a 11% increase from 2003 levels. California, with 187, had a large majority of firms in this sector. Nonemployer firms in the seafood retail sector in the had recepts totaling $22 million in 2011. Region-wide, there were 221 employer establishments in the seafood retail sales sector in 2011, a decrease of 5.2% from 2003. Most of these firms were in the located in California (157). The number of employees in the seafood retail sector increased 20% from 1,252 employees in 2003 to 1,504 in 2011. Payroll in this sector was $37 million in 2011.

Transport, Support, and Marine Operations

The size of the Transport, Support, and Marine Operations sectors in the Pacific region is difficult to assess because much of the state-level data is suppressed for confidentiality purposes. It is clear, however, that these sectors play an important role in the regional economy. For example, there were 416 establishments classified as marinas, employing 3,020 workers and spending $104 million on payroll in2011. Marine cargo handling accounted for employment 22,722 workers and contributing $1.7 billion in payroll in California and Washington alone. The Ship and Boat Building Sector consisted of 277 establishments employing 15,576 workers and contributing $766 million in payroll across all three states in the region.

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

2012 Economic Impacts of the Pacific Region Seafood Industry (thousands of dollars)

	Landings Revenue	Jobs	Sales	Income	Valued Added
California	231,683	145,433	24,043,813	5,172,755	8,582,461
Oregon	128,030	16,051	1,174,111	385,350	550,045
Washington	275,585	60,955	7,533,447	2,002,804	3,055,370

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	423,244	440,474	414,584	471,788	459,772	500,447	491,183	553,909	708,925	661,994
Finfish & other	156,596	178,693	166,922	176,425	176,104	215,784	168,495	202,527	260,605	245,831
Shellfish	266,647	261,781	247,662	295,363	283,668	284,663	322,688	351,383	448,320	416,163
Albacore tuna	24,366	27,242	20,574	23,767	21,612	28,845	27,541	28,780	43,347	45,736
Crab	130,952	115,365	97,127	143,758	121,136	107,107	123,865	132,843	182,085	176,804
Flatfish	13,441	12,741	13,816	12,974	14,462	15,738	14,155	10,511	11,225	11,637
Hake (whiting)	17,150	21,819	29,139	34,425	32,603	58,492	14,104	27,316	52,869	47,054
Other shellfish	89,222	102,423	107,438	116,161	120,569	129,947	131,593	129,561	160,270	137,696
Rockfish	7,803	6,832	6,559	6,848	7,541	9,257	8,974	9,226	9,446	9,424
Sablefish	18,817	17,230	20,366	22,991	20,984	27,279	34,481	35,977	44,873	28,106
Salmon	30,773	47,676	37,188	34,306	33,865	26,992	24,986	48,986	53,454	47,508
Shrimp	28,175	30,586	15,706	12,433	17,298	25,132	16,594	21,941	40,636	40,318
Squid	25,340	19,748	31,516	26,998	29,169	26,585	56,928	71,173	66,578	63,846

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total landings	993,985	1,138,763	1,301,649	1,169,906	1,109,222	1,091,673	897,222	1,063,491	1,175,142	1,068,691
Finfish & other	756,538	932,610	1,070,529	935,523	902,887	906,773	582,120	650,822	756,721	719,339
Shellfish	237,447	206,153	231,120	234,383	206,335	184,900	315,102	412,669	418,421	349,352
Albacore tuna	36,577	31,764	19,649	28,117	25,483	24,507	27,055	25,477	24,284	30,585
Crab	81,892	69,247	61,849	85,301	51,888	45,075	59,158	61,668	66,518	52,831
Flatfish	31,849	29,895	31,495	27,689	33,502	37,409	40,599	33,281	25,557	24,439
Hake (whiting)	309,300	474,460	569,273	558,078	454,533	531,277	253,053	355,216	496,363	347,171
Other shellfish	27,884	31,275	30,907	30,611	29,543	28,557	28,911	26,159	27,598	26,233
Rockfish	9,275	8,057	7,406	6,633	7,447	9,469	10,458	11,038	9,910	10,406
Sablefish	12,204	12,905	13,742	13,718	11,630	12,978	15,822	15,055	14,139	11,580
Salmon	39,234	40,609	27,249	29,172	24,600	19,040	33,742	30,693	41,799	24,303
Shrimp	38,997	29,422	26,069	20,290	26,497	35,799	33,456	46,191	66,686	66,317
Squid	99,115	88,215	123,090	108,561	109,464	85,200	205,643	288,678	268,078	214,828

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Albacore tuna	0.67	0.86	1.05	0.85	0.85	1.18	1.02	1.13	1.78	1.50
Crab	1.60	1.67	1.57	1.69	2.33	2.38	2.09	2.15	2.74	3.35
Flatfish	0.42	0.43	0.44	0.47	0.43	0.42	0.35	0.32	0.44	0.48
Hake (whiting)	0.06	0.05	0.05	0.06	0.07	0.11	0.06	0.08	0.11	0.14
Other shellfish	3.20	3.27	3.48	3.79	4.08	4.55	4.55	4.95	5.81	5.25
Rockfish	0.84	0.85	0.89	1.03	1.01	0.98	0.86	0.84	0.95	0.91
Sablefish	1.54	1.34	1.48	1.68	1.80	2.10	2.18	2.39	3.17	2.43
Salmon	0.78	1.17	1.36	1.18	1.38	1.42	0.74	1.60	1.28	1.95
Shrimp	0.72	1.04	0.60	0.61	0.65	0.70	0.50	0.48	0.61	0.61
Squid	0.26	0.22	0.26	0.25	0.27	0.31	0.28	0.25	0.25	0.30

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

	Trips	Jobs	Sales	Income	Value Added
California	5,570,000	12,134	1,701,218	629,208	1,007,312
Oregon	679,000	2,958	325,880	126,477	198,687
Washington	1,177,000	3,794	494,583	183,754	292,083

2012 Angler Trip & Durable Expenditures (thousands of dollars)

Fishing Mode	Trip Expenditures		Equipment	Durable Expenditures
	Non-Residents	Residents	Fishing Tackle	335,836
For-Hire	25,195	121,996	Other Equipment	146,537
Private Boat	7,936	200,720	Boat Expenses	504,241
Shore	7,542	290,232	Vehicle Expenses	163,437
Total Trip Expenditures	40,672	612,947	Second Home Expenses	6,406
			Total Durable Equipment Expenditures	1,156,457
Total State Trip and Durable Equipment Expenditures				1,810,076

Recreational Anglers by Residential Area (thousands of anglers)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Coastal	1,437	1,168	1,028	1,257	1,184	1,065	1,136	1,047	1,069	1,181
Non-Coastal	538	429	409	481	379	385	638	384	390	468
Out-of-State[1]	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Total Anglers	1,975	1,597	1,437	1,738	1,563	1,450	1,774	1,431	1,459	1,649

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
For-Hire	619	649	624	635	605	514	492	455	654	647
Private Boat	4,247	1,752	1,849	1,761	1,828	1,421	1,471	1,432	1,659	1,806
Shore	3,445	4,255	3,962	4,548	3,818	3,846	4,345	3,739	3,792	4,973
Total Trips	8,311	6,656	6,435	6,944	6,251	5,781	6,308	5,626	6,105	7,426

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Albacore & other tunas	H	168	80	23	45	106	51	80	90	53	153
	R	83	10	2	2	7	0	13	0	4	34
Barracuda, bass & bonito	H	1,888	2,126	1,015	668	537	434	412	373	435	371
	R	3,727	2,597	2,011	1,660	1,407	1,093	1,211	991	738	775
Croakers	H	758	619	572	456	427	321	427	173	128	256
	R	871	660	618	553	631	272	362	340	98	231
Flatfishes	H	680	499	560	325	260	344	329	417	641	561
	R	948	343	513	520	338	361	297	277	222	296
Greenlings	H	510	208	268	234	192	169	188	158	227	272
	R	860	344	283	209	153	141	194	197	292	306
Mackerel	H	918	945	1,023	1,158	823	940	753	479	590	438
	R	2,011	1,715	1,872	3,287	1,209	1,765	1,267	1,272	1,050	806
Rockfishes & scorpionfishes	H	3,624	2,415	3,432	2,504	2,255	1,841	1,991	2,194	2,873	3,359
	R	1,664	757	1,149	731	513	465	689	584	558	911
Salmon	H	706	607	432	223	450	104	808	162	384	467
	R	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Sculpins	H	104	72	72	55	49	60	59	53	91	68
	R	297	246	238	222	208	228	200	198	238	229
Surfperches	H	1,139	1,297	945	1,164	861	832	752	638	1,017	1,144
	R	1,180	1,561	1,242	1,675	861	817	706	452	931	1,279

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

[2] Due to changes in data collection methods, the Pacific Region's effort (number of trips) and catch (number of fish harvested or released) estimates for 2003 are not comparable to the 2004-2012 estimates.

2012 Economic Impacts of the California Seafood Industry (thousands of dollars)

	Jobs	Sales	Income	Value Added
Total Impacts	145,433	24,043,813	5,172,755	8,582,461
Commercial Harvesters	4,810	463,907	157,473	231,557
Seafood Processors & Dealers	5,416	558,577	207,125	274,835
Importers	65,538	18,028,000	2,889,331	5,495,724
Seafood Wholesalers & Distributors	12,860	1,854,311	601,446	840,262
Retail	56,808	3,139,018	1,317,380	1,740,084

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	136,152	140,615	116,084	129,907	127,580	120,861	150,752	176,252	201,300	231,683
Finfish & other	56,402	58,798	46,640	43,164	50,363	46,968	46,682	44,291	55,785	55,531
Shellfish	79,750	81,816	69,444	86,743	77,217	73,893	104,070	131,960	145,515	176,153
Crab	37,455	43,381	19,653	46,483	28,626	24,227	32,508	43,016	53,762	88,189
Pacific sardine	2,874	3,957	3,150	5,100	8,218	7,575	5,544	4,366	4,398	4,564
Rockfish	4,761	4,447	4,145	4,630	4,924	5,781	5,330	5,453	5,644	5,174
Sablefish	4,721	3,724	4,295	4,892	4,873	6,224	9,765	11,491	15,121	8,988
Salmon	12,153	17,770	12,804	5,261	7,835	6	ND[3]	1,215	5,095	12,842
Sea urchins	7,906	7,300	6,156	5,145	5,400	6,550	7,806	7,413	8,102	8,319
Shrimp	3,520	3,783	4,338	4,213	4,064	5,696	5,462	4,951	8,596	8,483
Spiny lobster	5,278	6,160	6,039	8,111	6,916	8,008	7,934	11,386	12,971	13,703
Squid	25,333	19,740	31,467	26,959	29,131	26,477	56,877	71,165	66,567	63,838
Swordfish	7,850	4,834	1,896	2,695	3,127	2,365	1,932	2,203	3,348	2,089

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total landings	382,146	379,591	442,353	341,661	384,826	323,884	374,795	437,847	408,199	352,700
Finfish & other	252,764	257,944	301,993	203,107	258,625	223,912	147,934	120,103	108,119	101,777
Shellfish	129,381	121,647	140,360	138,554	126,200	99,972	226,861	317,744	300,080	250,923
Crab	23,922	27,016	12,028	27,391	12,393	9,845	16,660	23,352	22,206	27,586
Pacific sardine	76,528	97,509	76,324	102,683	178,480	126,945	82,842	73,814	60,993	50,660
Rockfish	4,399	3,843	3,181	3,252	3,136	3,933	3,984	3,949	3,450	3,458
Sablefish	3,636	3,158	3,645	3,617	3,240	3,507	5,089	5,501	5,646	3,916
Salmon	7,328	7,113	4,962	1,184	1,743	1	ND[1]	255	1,132	2,860
Sea urchins	11,107	12,219	11,304	10,664	11,131	10,283	12,205	11,230	11,465	11,441
Shrimp	3,498	3,520	2,944	1,197	2,015	3,011	3,596	4,522	8,217	7,254
Spiny lobster	736	860	761	886	663	741	706	716	751	874
Squid	99,088	88,167	122,887	108,410	109,150	84,071	205,278	288,497	267,985	214,707
Swordfish	4,706	2,613	653	1,187	1,210	1,168	898	815	1,364	886

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Crab	1.57	1.61	1.63	1.70	2.31	2.46	1.95	1.84	2.42	3.20
Pacific sardine	0.04	0.04	0.04	0.05	0.05	0.06	0.07	0.06	0.07	0.09
Rockfish	1.08	1.16	1.30	1.42	1.57	1.47	1.34	1.38	1.64	1.50
Sablefish	1.30	1.18	1.18	1.35	1.50	1.77	1.92	2.09	2.68	2.29
Salmon	1.66	2.50	2.58	4.44	4.50	4.16	ND[1]	4.76	4.50	4.49
Sea urchins	0.71	0.60	0.54	0.48	0.49	0.64	0.64	0.66	0.71	0.73
Shrimp	1.01	1.07	1.47	3.52	2.02	1.89	1.52	1.09	1.05	1.17
Spiny lobster	7.18	7.16	7.93	9.15	10.44	10.80	11.24	15.91	17.27	15.67
Squid	0.26	0.22	0.26	0.25	0.27	0.31	0.28	0.25	0.25	0.30
Swordfish	1.67	1.85	2.90	2.27	2.58	2.03	2.15	2.70	2.46	2.36

[3]ND = these data are confidential thus not disclosable

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

	Jobs	Sales	Income	Value Added
Trip Impacts by Fishing Mode:				
For-Hire	1,573	224,565	95,922	145,066
Private Boat	709	124,506	38,439	65,210
Shore	1,909	296,629	92,745	156,363
Total Durable Equipment Impacts	7,943	1,055,518	402,102	640,673
Total State Trip and Durable Equipment Economic Impacts	12,134	1,701,218	629,208	1,007,312

2012 Angler Trip & Durable Expenditures (thousands of dollars)

Fishing Mode	Trip Expenditures		Equipment	Durable Expenditures
	Non-Residents	Residents	Fishing Tackle	243,047
For-Hire	21,860	98,537	Other Equipment	102,918
Private Boat	3,276	90,807	Boat Expenses	238,858
Shore	5,736	259,818	Vehicle Expenses	118,698
Total Trip Expenditures	30,871	449,162	Second Home Expenses	4,406
			Total Durable Equipment Expenditures	707,926
Total State Trip and Durable Equipment Expenditures				1,187,959

Recreational Anglers by Residential Area (thousands of anglers)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Coastal	1,113	865	740	991	878	819	888	803	714	921
Non-Coastal	378	280	263	335	226	246	490	241	238	316
Out of State	115	98	79	109	65	83	71	69	93	86
Total Anglers	1,606	1,243	1,082	1,435	1,169	1,148	1,449	1,113	1,045	1,323

Recreational Fishing Effort by Mode (thousands of angler-trips)[1]

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
For-Hire	483	521	504	522	489	424	385	357	560	544
Private	3,117	708	902	896	768	640	676	655	682	799
Shore	2,699	3,509	3,216	3,802	3,072	3,100	3,599	2,993	3,046	4,227
Total Trips	6,299	4,738	4,622	5,220	4,329	4,164	4,660	4,005	4,288	5,570

Harvest (H) and Release (R) of Key Species Species Groups (thousands of fish)[2]

		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Albacore & other tunas	H	146	49	6	9	22	5	13	20	8	39
	R	83	10	2	3	7	(1)	13	2	6	36
Barracuda, bass & bonito [1]	H	1,888	2,126	1,015	668	537	434	412	373	435	371
	R	3,727	2,597	2,011	1,660	1,407	1,093	1,211	991	738	775
Croakers	H	758	619	572	456	427	321	427	173	128	256
	R	871	660	618	553	631	272	362	340	98	231
Flatfishes	H	603	410	478	241	187	276	258	353	575	492
	R	850	295	465	471	292	313	241	231	176	249
Greenlings	H	357	72	125	104	69	48	64	38	88	118
	R	717	239	179	113	67	53	83	96	178	200
Mackerel	H	918	945	1,023	1,158	823	940	753	479	590	438
	R	2,011	1,715	1,872	3,287	1,209	1,765	1,267	1,272	1,050	806
Rockfishes & scorpionfishes	H	3,035	1,778	2,725	1,891	1,674	1,318	1,383	1,613	2,348	2,780
	R	1,621	701	1,058	668	456	402	605	494	483	839
Salmon	H	95	223	144	98	48	(1)	1	15	50	123
	R	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Sculpins	H	70	41	39	25	19	29	27	21	58	37
	R	140	98	87	74	58	78	50	46	86	77
Surfperches	H	878	1,046	694	913	610	581	501	387	766	892
	R	1,016	1,402	1,083	1,516	702	658	546	292	771	1,119

[1] Due to changes in data collection methods, California's participation (number of anglers), effort(number of trips), and catch (number of fish harvested or released) estimates for 2003 are not comparable to 2004-2012 estimates.

[2] Salmon harvest estimates exclude release mortality.

[1] This species may not be equivalent to species with similar names listed in the commercial tables.

California's State Economy (% of national total)

	Establishments	Employees	Annual Payroll (million $)	Employee Compensation (million $)	Gross State Product (million $)	Commercial Location Quotient[2]
2003	827,472 (11.4%)	12,991,795 (11.5%)	520,597 (12.9%)	826,026 (13.0%)	1,461,072 (13.2%)	0.83
2011	849,316 (11.5%)	12,698,427 (11.2%)	663,571 (12.8%)	1,053,000 (12.7%)	1,908,985 (12.8%)	0.57
%change	2.64%	-2.26%	27.46%	27.48%	30.66%	-31.3 %

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Firms	77	98	88	91	121	139	156	184	187
	Receipts	9,858	14,312	10,207	8,298	10,842	11,460	10,432	9,695	9,788
Seafood sales, retail	Firms	192	193	166	163	222	210	200	203	209
	Receipts	19,771	19,092	16,892	19,875	19,703	19,892	17,047	19,021	18,006

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Establishments	60	55	48	47	49	45	47	48	48
	Employees	2,896	2,931	2,963	2,592	2,229	2,024	2,167	1,820	1,842
	Payroll	74,637	72,178	92,642	78,065	75,886	65,215	69,529	62,480	60,411
Seafood Sales, wholesale	Establishments	269	263	258	252	300	278	289	314	404
	Employees	3,536	3,744	3,925	4,063	4,429	3,321	3,183	3,223	3,505
	Payroll	115,669	124,657	134,576	144,758	159,672	132,139	128,813	137,810	149,302
Seafood sales, retail	Establishments	175	169	180	184	182	161	153	158	157
	Employees	968	945	999	1,031	1,004	932	976	985	1,088
	Payroll	19,919	16,686	18,832	19,900	21,224	20,585	21,785	22,718	25,168

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Coastal & Great Lakes freight transportation	Establishments	22	20	26	22	29	28	30	25	21
	Employees	1,341	ND	1,346	ND	ND	ND	ND	554	395
	Payroll	117,982	ND	129,262	ND	ND	ND	ND	30,431	24,708
Deep sea freight transportation	Establishments	51	50	54	54	51	43	41	54	51
	Employees	902	901	ND	957	1,643	ND	ND	2,562	2,464
	Payroll	62,417	69,815	ND	84,199	116,628	ND	ND	236,235	256,962
Deep sea passenger transportation	Establishments	14	15	15	16	13	5	5	3	2
	Employees	ND	ND	ND	1,552	ND	ND	ND	ND	ND
	Payroll	ND	ND	ND	72,119	ND	ND	ND	ND	ND
Marinas	Establishments	263	271	263	268	276	277	276	270	269
	Employees	2,485	2,476	2,426	2,457	2,680	2,652	2,514	2,390	2,401
	Payroll	70,640	73,338	71,318	74,778	80,216	85,315	78,890	80,631	82,958
Marine cargo handling	Establishments	56	54	54	52	56	61	62	63	71
	Employees	15,557	20,456	19,303	20,975	22,395	22,086	17,428	18,449	18,812
	Payroll	1,040,515	1,179,221	1,273,698	1,448,623	1,484,308	1,453,281	1,211,572	1,273,268	1,333,805
Navigational services to shipping	Establishments	35	38	37	36	39	40	39	41	45
	Employees	850	ND	ND	817	858	815	804	765	760
	Payroll	53,162	ND	ND	63,893	63,610	65,225	61,720	58,899	62,065
Port & harbor operations	Establishments	19	20	20	20	18	17	19	21	19
	Employees	417	ND	ND	582	443	256	345	435	508
	Payroll	23,110	ND	ND	32,523	30,001	23,316	26,889	37,560	41,688
Ship & boat building	Establishments	141	143	141	132	136	136	123	117	108
	Employees	8,574	8,865	10,132	9,801	9,250	11,630	10,483	9,720	9,165
	Payroll	314,706	354,404	410,446	453,255	433,846	477,300	460,239	448,338	434,449

[2]The U.S. Commerical 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

2012 Economic Impacts of the Oregon Seafood Industry (thousands of dollars)

	Jobs	Sales	Income	Value Added
Total Impacts	16,051	1,174,111	385,350	550,045
Commercial Harvesters	4,363	240,186	99,292	139,007
Seafood Processors & Dealers	1,482	128,118	49,205	64,289
Importers	1,423	391,373	62,725	119,308
Seafood Wholesalers & Distributors	611	74,585	25,302	33,936
Retail	8,172	339,849	148,826	193,505

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	86,779	101,022	88,196	106,093	97,298	103,042	104,706	104,719	148,354	128,030
Finfish & other	40,889	49,634	53,192	46,326	47,589	56,912	52,749	58,730	76,718	72,205
Shellfish	45,890	51,388	35,005	59,767	49,709	46,130	51,957	45,990	71,636	55,825
Albacore tuna	6,169	9,145	8,815	8,067	9,468	10,666	10,191	12,425	18,766	15,077
Crab	37,122	42,960	26,603	53,810	38,208	29,168	42,413	32,757	44,696	29,130
Flatfish	6,632	6,460	7,281	7,547	7,930	9,163	8,468	6,861	6,780	7,316
Hake (whiting)	3,642	4,641	7,107	7,974	6,501	6,830	3,783	5,414	16,518	14,611
Oysters	3,292	3,292	1,232	1,163	1,847	2,748	2,253	1,658	1,869	1,661
Pacific sardine	2,941	4,870	6,199	3,743	4,551	5,665	5,291	5,252	3,192	8,977
Rockfish	2,327	1,633	1,387	1,564	2,002	2,610	2,500	2,520	2,473	2,660
Sablefish	7,381	6,935	8,657	9,787	9,494	13,737	15,919	15,069	17,351	11,529
Salmon	8,869	12,995	10,437	4,940	4,647	4,166	3,546	7,698	6,737	6,924
Shrimp	5,051	4,740	6,901	4,494	9,365	13,937	6,813	11,006	24,607	24,685

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total landings	226,317	294,866	312,636	282,846	253,543	195,688	198,895	201,560	274,533	295,892
Finfish & other	180,788	254,330	278,646	236,998	216,134	155,837	154,147	153,588	208,445	237,655
Shellfish	45,529	40,536	33,990	45,848	37,410	39,851	44,747	47,972	66,088	58,237
Albacore tuna	9,165	10,754	8,087	8,534	10,468	8,876	10,082	10,703	9,682	9,886
Crab	23,934	27,276	17,734	33,291	17,007	13,875	21,848	15,817	17,240	8,656
Flatfish	14,372	14,846	16,910	16,385	19,697	23,842	26,047	22,226	15,958	15,322
Hake (whiting)	80,648	130,238	135,503	122,804	81,481	55,511	53,466	57,017	142,092	102,651
Oysters	823	823	308	255	197	162	563	415	467	415
Pacific sardine	55,683	79,610	99,450	74,669	90,037	49,298	45,902	44,743	23,479	91,354
Rockfish	3,434	2,574	2,007	1,967	2,905	3,820	4,207	4,533	3,819	3,918
Sablefish	4,798	5,627	5,834	5,838	5,349	6,514	7,219	6,269	5,074	4,738
Salmon	6,720	5,914	4,666	1,810	1,370	1,860	2,311	2,765	2,386	1,916
Shrimp	20,546	12,207	15,784	12,128	19,990	25,400	22,019	31,429	48,198	49,009

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Albacore tuna	0.67	0.85	1.09	0.95	0.90	1.20	1.01	1.16	1.94	1.53
Crab	1.55	1.58	1.50	1.62	2.25	2.10	1.94	2.07	2.59	3.37
Flatfish	0.46	0.44	0.43	0.46	0.40	0.38	0.33	0.31	0.42	0.48
Hake (whiting)	0.05	0.04	0.05	0.06	0.08	0.12	0.07	0.09	0.12	0.14
Oysters	4.00	4.00	4.00	4.56	9.40	16.96	4.00	4.00	4.00	4.00
Pacific sardine	0.05	0.06	0.06	0.05	0.05	0.11	0.12	0.12	0.14	0.10
Rockfish	0.68	0.63	0.69	0.80	0.69	0.68	0.59	0.56	0.65	0.68
Sablefish	1.54	1.23	1.48	1.68	1.78	2.11	2.21	2.40	3.42	2.43
Salmon	1.32	2.20	2.24	2.73	3.39	2.24	1.53	2.78	2.82	3.61
Shrimp	0.25	0.39	0.44	0.37	0.47	0.55	0.31	0.35	0.51	0.50

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

	Jobs	Sales	Income	Value Added
Trip Impacts by Fishing Mode:				
For-Hire	144	17,078	7,878	11,757
Private Boat	320	37,741	12,891	22,119
Shore	112	12,852	4,299	7,371
Total Durable Equipment Impacts	2,382	258,209	101,409	157,440
Total State Trip and Durable Equipment Economic Impacts	2,958	325,880	126,477	198,687

2012 Angler Trip & Durable Expenditures (thousands of dollars)

Fishing Mode	Trip Expenditures		Equipment	Durable Expenditures
	Non-Residents	Residents	Fishing Tackle	45,344
For-Hire	704	11,093	Other Equipment	22,356
Private Boat	2,487	32,502	Boat Expenses	119,032
Shore	1,109	9,916	Vehicle Expenses	25,084
Total Trip Expenditures	4,299	53,510	Second Home Expenses	1,228
			Total Durable Equipment Expenditures	213,044
Total State Trip and Durable Equipment Expenditures				270,853

Recreational Anglers by Residential Area (thousands of anglers)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Coastal	91	90	87	82	86	79	85	82	81	84
Non-Coastal	135	125	123	125	130	120	128	124	122	128
Out of State	15	16	14	15	15	14	15	14	14	15
Total Anglers	241	231	224	222	231	213	228	220	217	227

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
For-Hire	67	64	58	56	61	48	56	51	52	57
Private	426	426	382	373	399	353	396	378	370	389
Shore	233	233	233	233	233	233	233	233	233	233
Total Trips	726	723	673	662	693	634	685	662	655	679

Harvest (H) and Release (R) of Key Species Species Groups (thousands of fish)[1]

		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Albacore tuna	H	11	17	5	12	59	24	43	38	29	63
	R	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)
Baitfishes	H	220	221	220	220	220	220	220	223	221	220
	R	124	124	124	124	124	124	124	125	125	125
Flatfishes	H	15	27	21	21	22	21	17	14	15	17
	R	6	7	7	7	6	8	9	5	5	6
Greenlings	H	94	97	104	97	95	92	90	90	97	111
	R	79	80	79	74	67	69	72	79	85	83
Rockfishes	H	405	381	400	331	321	307	363	373	290	320
	R	23	31	58	40	38	47	51	64	53	50
Salmon	H	154	128	42	16	68	14	91	23	24	35
	R	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Sculpins	H	17	14	16	14	15	16	16	16	16	15
	R	56	57	60	57	59	59	59	61	61	61
Sturgeon	H	12	12	12	12	12	12	12	12	12	12
	R	24	24	24	24	24	24	24	25	25	25
Surfperches	H	118	118	118	118	118	118	118	118	118	118
	R	39	39	39	39	39	39	39	39	39	39

[1] Salmon harvest estimates exclude release mortality.

Oregon's State Economy (% of national total)

	Establishments	Employees	Annual Payroll (million $)	Employee Compensation (million $)	Gross State Product (million $)	Commercial Location Quotient[2]
2003	103,064 (1.4%)	1,338,825 (1.2%)	44,347 (1.1%)	73,830 (1.2%)	124,566 (1.1%)	3.26
2011	106,340 (1.4%)	1,341,841 (1.2%)	56,092 (1.1%)	93,021 (1.1%)	188,981 (1.3%)	3.54
%change	3.18%	0.23%	26.48%	25.99%	51.71%	8.59 %

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Firms	ND	ND	9	7	ND	19	15	15	16
	Receipts	ND	ND	309	54	ND	957	469	510	467
Seafood sales, retail	Firms	10	11	7	11	11	16	12	15	16
	Receipts	428	507	985	914	1,210	2,101	1,133	1,907	1,896

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Establishments	19	18	20	21	22	23	20	21	22
	Employees	720	738	762	896	819	850	812	806	805
	Payroll	21,980	20,593	19,022	25,881	27,394	27,616	26,202	27,007	32,438
Seafood Sales, wholesale	Establishments	26	21	23	16	18	18	19	22	27
	Employees	ND	126	ND	ND	ND	ND	ND	ND	ND
	Payroll	ND	4,446	ND	ND	ND	ND	ND	ND	ND
Seafood sales, retail	Establishments	21	24	24	22	23	21	23	21	20
	Employees	ND	171	204	306	171	178	151	162	163
	Payroll	ND	3,259	3,464	3,294	3,185	3,370	3,515	3,651	3,613

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Coastal & Great Lakes freight transportation	Establishments	8	8	9	9	13	8	9	8	8
	Employees	ND	ND	ND	ND	476	ND	ND	ND	ND
	Payroll	ND	ND	ND	ND	25,206	ND	ND	ND	ND
Deep sea freight transportation	Establishments	6	6	6	6	5	4	3	3	3
	Employees	ND	ND	ND	ND	ND	ND	ND	ND	ND
	Payroll	ND	ND	ND	ND	ND	ND	ND	ND	ND
Deep sea passenger transportation	Establishments	NA	NA	NA	NA	2	NA	NA	NA	NA
	Employees	NA	NA	NA	NA	ND	NA	NA	NA	NA
	Payroll	NA	NA	NA	NA	ND	NA	NA	NA	NA
Marinas	Establishments	42	41	40	37	38	37	33	30	33
	Employees	122	133	113	ND	138	106	109	102	102
	Payroll	2,742	2,988	3,550	ND	3,754	2,178	2,602	2,290	2,382
Marine cargo handling	Establishments	8	8	8	9	9	13	13	12	13
	Employees	ND	ND	ND	ND	ND	ND	ND	ND	ND
	Payroll	ND	ND	ND	ND	ND	ND	ND	ND	ND
Navigational services to shipping	Establishments	21	21	21	20	17	20	17	18	18
	Employees	ND	ND	ND	ND	183	200	189	144	152
	Payroll	ND	ND	ND	ND	11,331	11,808	10,154	9,577	9,592
Port & harbor operations	Establishments	1	NA	NA	NA	2	1	1	3	3
	Employees	ND	NA	NA	NA	ND	ND	ND	ND	ND
	Payroll	ND	NA	NA	NA	ND	ND	ND	ND	ND
Ship & boat building	Establishments	43	50	43	41	40	41	35	34	34
	Employees	1,284	1,285	1,298	1,230	1,441	1,692	1,886	980	1,179
	Payroll	42,270	43,357	45,183	43,416	47,950	74,583	90,446	42,004	55,068

[2]The U.S. Commerical 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

2012 Economic Impacts of the Washington Seafood Industry (thousands of dollars)

	Jobs	Sales	Income	Value Added
Total Impacts	60,955	7,533,447	2,002,804	3,055,370
Commercial Harvesters	6,467	548,724	230,821	326,152
Seafood Processors & Dealers	16,288	1,548,940	581,759	769,869
Importers	15,049	4,139,680	663,463	1,261,956
Seafood Wholesalers & Distributors	2,560	335,395	112,371	153,311
Retail	20,591	960,709	414,391	544,082

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	172,829	166,247	193,317	217,030	216,119	232,841	227,773	255,332	329,785	275,585
Finfish & other	47,415	55,906	50,145	68,201	59,386	68,213	61,115	81,902	98,627	91,409
Shellfish	125,414	110,342	143,172	148,829	156,733	164,628	166,658	173,430	231,159	184,177
Clams	36,060	42,297	48,503	55,786	56,428	64,141	72,646	73,625	88,739	69,412
Crab	56,374	29,024	50,872	43,464	54,302	53,712	48,944	57,070	83,627	59,485
Hake (Whiting)	1,601	2,341	4,937	7,296	7,121	7,249	2,334	4,105	7,183	5,882
Halibut	5,991	7,264	6,512	8,303	8,842	7,525	4,879	5,764	6,740	6,122
Mussels	2,513	3,096	3,729	6,564	3,820	5,293	4,851	4,318	4,740	6,065
Oysters	26,142	31,257	33,697	38,302	37,437	34,794	34,993	30,370	43,021	37,576
Sablefish	6,675	6,517	7,395	8,307	6,608	7,312	8,796	9,402	12,378	7,578
Salmon	9,941	17,316	14,319	24,586	22,026	23,376	22,003	40,622	42,434	28,398
Shrimp	3,723	3,648	4,335	3,602	3,746	5,380	4,139	5,677	7,140	6,986
Tuna, Albacore	15,621	15,657	10,643	15,176	10,439	17,225	16,390	14,575	22,253	28,440

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total landings	189,479	192,181	213,502	241,606	194,449	173,176	163,937	189,486	210,282	213,578
Finfish & other	132,940	155,224	156,902	191,717	151,762	128,208	120,452	142,608	158,113	173,506
Shellfish	56,539	36,957	56,600	49,889	42,687	44,968	43,485	46,878	52,169	40,072
Clams	3,127	3,319	3,621	4,617	3,363	4,070	4,266	3,876	4,023	3,664
Crab	34,037	14,955	32,086	24,619	22,487	21,355	20,651	22,500	27,072	16,590
Hake (Whiting)	35,124	69,117	93,654	120,058	91,272	67,159	36,378	58,900	73,494	38,524
Halibut	1,868	2,254	1,948	2,451	2,428	2,055	1,731	1,371	1,301	1,295
Mussels	337	427	504	774	475	593	568	589	547	559
Oysters	9,649	11,058	12,190	12,306	11,189	10,258	9,386	8,650	9,389	8,143
Sablefish	3,736	4,064	4,240	4,259	3,035	2,954	3,514	3,277	3,410	2,916
Salmon	25,493	27,918	17,926	26,570	21,938	17,641	31,821	28,086	38,706	19,839
Shrimp	8,867	6,599	7,279	6,926	4,455	7,355	7,775	10,153	10,193	10,009
Tuna, Albacore	23,672	18,044	10,505	19,133	13,129	14,801	16,112	13,148	13,209	19,275

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Clams	11.53	12.74	13.40	12.08	16.78	15.76	17.03	19.00	22.06	18.95
Crab	1.66	1.94	1.59	1.77	2.41	2.52	2.37	2.54	3.09	3.59
Hake (Whiting)	0.05	0.03	0.05	0.06	0.08	0.11	0.06	0.07	0.10	0.15
Halibut	3.21	3.22	3.34	3.39	3.64	3.66	2.82	4.20	5.18	4.73
Mussels	7.46	7.26	7.40	8.48	8.05	8.93	8.54	7.33	8.66	10.85
Oysters	2.71	2.83	2.76	3.11	3.35	3.39	3.73	3.51	4.58	4.61
Sablefish	1.79	1.60	1.74	1.95	2.18	2.48	2.50	2.87	3.63	2.60
Salmon	0.39	0.62	0.80	0.93	1.00	1.33	0.69	1.45	1.10	1.43
Shrimp	0.42	0.55	0.60	0.52	0.84	0.73	0.53	0.56	0.70	0.70
Tuna, Albacore	0.66	0.87	1.01	0.79	0.80	1.16	1.02	1.11	1.68	1.48

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

	Jobs	Sales	Income	Value Added
Trip Impacts by Fishing Mode:				
For-Hire	171	22,814	9,931	14,951
Private Boat	690	107,776	32,981	56,428
Shore	206	28,895	8,969	15,124
Total Durable Equipment Impacts	2,727	335,098	131,873	205,580
Total State Trip and Durable Equipment Economic Impacts	3,794	494,583	183,754	292,083

2012 Angler Trip & Durable Expenditures (thousands of dollars)

Fishing Mode	Trip Expenditures		Equipment	Durable Expenditures
	Non-Residents	Residents	Fishing Tackle	47,445
For-Hire	2,631	12,366	Other Equipment	21,263
Private Boat	2,173	77,411	Boat Expenses	146,351
Shore	697	20,498	Vehicle Expenses	19,655
Total Trip Expenditures	5,502	110,275	Second Home Expenses	772
			Total Durable Equipment Expenditures	235,487
Total State Trip and Durable Equipment Expenditures				351,264

Recreational Anglers by Residential Area (thousands of anglers)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Coastal	233	213	201	184	220	167	163	162	274	176
Non-Coastal	25	24	23	21	23	19	20	19	30	24
Out of State	20	19	18	17	19	15	16	15	17	19
Total Anglers	278	256	242	222	262	201	199	196	321	219

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
For-Hire	69	64	62	57	55	42	51	47	42	46
Private	704	618	565	492	661	428	399	399	607	618
Shore	513	513	513	513	513	513	513	513	513	513
Total Trips	1,286	1,195	1,140	1,062	1,229	983	963	959	1,162	1,177

Harvest (H) and Release (R) of Key Species Species Groups (thousands of fish)[1]

		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Albacore tuna	H	11	14	12	24	25	22	24	32	16	51
	R	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)
Flatfishes	H	62	62	61	63	51	47	54	50	51	52
	R	92	41	41	42	40	40	47	41	41	41
Greenlings	H	59	39	39	33	28	29	34	30	42	43
	R	64	25	25	22	19	19	39	22	29	23
Rockfishes [1]	H	184	256	307	282	260	216	245	208	235	259
	R	20	25	33	23	19	16	33	26	22	22
Salmon	H	457	256	246	109	334	90	716	124	310	309
	R	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Sculpins	H	17	17	17	16	15	15	16	16	17	16
	R	101	91	91	91	91	91	91	91	91	91
Sharks & Skates	H	15	1	1	1	(1)	1	1	(1)	(1)	(1)
	R	203	14	12	14	9	12	10	3	1	3
Smelt & herring	H	2,487	2,486	2,486	2,486	2,486	2,486	2,486	2,486	2,486	2,486
	R	136	126	126	126	126	126	126	126	126	126
Sturgeon	H	8	8	8	7	8	8	9	NA	NA	NA
	R	18	25	30	21	18	12	17	NA	NA	NA
Surfperches	H	143	133	133	133	133	133	133	133	133	134
	R	125	120	120	120	120	120	121	121	121	121

[3]In this table, '(1)' = 0-999 thousand fish and '1' = 1,000-1,499 thousand fish.
[1]Salmon harvest estimates exclude release mortality.
[1]This species 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 (million $)	Employee Compensation (million $)	Gross State Product (million $)	Commercial Location Quotient[2]
2003	167,272 (2.3%)	2,293,222 (2.0%)	90,587 (2.2%)	141,093 (2.2%)	247,056 (2.2%)	13.3
2011	173,511 (2.4%)	2,355,123 (2.1%)	118,648 (2.3%)	196,338 (2.4%)	357,056 (2.4%)	11.9
%change	3.73%	2.70%	30.98%	39.16%	44.52%	-10.8 %

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Firms	59	53	54	53	63	44	44	39	37
	Receipts	5,680	4,446	5,568	4,149	4,698	5,167	4,007	4,228	3,859
Seafood sales, retail	Firms	32	30	31	29	32	33	40	30	34
	Receipts	1,623	2,202	1,836	1,727	1,458	1,807	2,132	1,273	2,370

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Seafood product prep. & packaging	Establishments	110	101	98	96	98	96	86	93	90
	Employees	5,968	5,851	5,743	5,705	5,249	5,893	4,860	5,296	5,387
	Payroll	231,153	247,316	239,962	255,129	275,662	306,213	232,543	254,592	293,112
Seafood Sales, wholesale	Establishments	121	116	126	115	127	107	108	105	107
	Employees	1,112	883	1,094	1,015	1,086	996	1,103	970	911
	Payroll	39,206	37,292	42,852	42,934	46,085	48,251	48,044	45,871	45,543
Seafood sales, retail	Establishments	37	40	47	49	50	44	43	47	44
	Employees	284	222	291	292	244	247	239	282	253
	Payroll	6,363	6,578	9,322	8,998	8,001	7,947	8,324	9,098	7,786

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

		2003	2004	2005	2006	2007	2008	2009	2010	2011
Coastal & Great Lakes freight transportation	Establishments	36	38	41	43	37	24	24	30	28
	Employees	1,607	2,039	1,672	2,353	1,903	2,222	2,245	1,731	1,684
	Payroll	112,319	128,786	122,000	145,144	136,543	168,832	168,783	130,398	132,068
Deep sea freight transportation	Establishments	27	23	24	23	30	21	25	20	14
	Employees	276	311	378	197	227	263	305	209	ND
	Payroll	16,147	20,559	22,655	14,390	19,692	24,843	28,897	24,711	ND
Deep sea passenger transportation	Establishments	3	2	3	3	3	4	5	4	2
	Employees	ND	ND	ND	ND	ND	ND	ND	ND	ND
	Payroll	ND	ND	ND	ND	ND	ND	ND	ND	ND
Marinas	Establishments	102	96	96	103	114	116	110	117	114
	Employees	430	449	442	466	485	573	570	560	517
	Payroll	12,400	12,763	13,556	14,269	15,623	18,931	18,811	18,783	18,364
Marine cargo handling	Establishments	23	30	30	29	28	25	27	26	32
	Employees	ND	ND	4,459	3,764	4,913	4,821	2,953	ND	3,910
	Payroll	ND	ND	318,873	303,375	334,601	334,193	239,490	ND	323,286
Navigational services to shipping	Establishments	52	53	53	56	61	76	69	79	78
	Employees	834	ND	841	942	950	1,213	1,168	1,225	1,207
	Payroll	51,092	ND	60,034	72,120	72,912	100,542	102,934	102,766	94,781
Port & harbor operations	Establishments	3	4	6	5	6	11	11	9	9
	Employees	ND	ND	ND	53	129	111	118	74	75
	Payroll	ND	ND	ND	3,436	4,631	6,359	6,437	4,662	4,937
Ship & boat building	Establishments	138	141	154	164	167	169	162	152	135
	Employees	6,056	6,474	7,154	7,669	7,742	8,067	6,710	5,406	5,232
	Payroll	244,124	272,336	307,735	313,230	354,084	402,253	312,240	284,759	276,402

[2]The U.S. Commerical 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