

2008 Economic Impacts of the California Seafood Industry (thousands of dollars)

| | Sales Impacts | Income Impacts | Job Impacts |
|------------------------------------|---------------|----------------|-------------|
| Total Impacts | 9,104,910 | 4,733,803 | 162,609 |
| Commercial Harvesters | 128,308 | 57,385 | 1,576 |
| Seafood Processors & Dealers | 782,495 | 246,983 | 5,168 |
| Seafood Wholesalers & Distributors | 2,110,097 | 1,003,895 | 17,636 |
| Retail Sector | 6,084,010 | 3,425,541 | 138,229 |

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

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Revenue | 149,796 | 142,451 | 107,890 | 111,923 | 136,152 | 140,615 | 116,084 | 129,907 | 120,212 | 113,429 |
| Finfish & Other | 80,621 | 82,530 | 65,335 | 59,888 | 56,402 | 58,798 | 46,640 | 43,164 | 50,363 | 46,979 |
| Shellfish | 69,175 | 59,920 | 42,554 | 52,035 | 79,750 | 81,816 | 69,444 | 86,743 | 69,850 | 66,450 |
| Crab | 18,258 | 15,264 | 10,635 | 15,074 | 37,455 | 43,381 | 19,653 | 46,483 | 28,626 | 24,208 |
| Lobster, Spiny | 3,648 | 4,711 | 4,475 | 4,784 | 5,278 | 6,160 | 6,039 | 8,111 | 6,916 | 7,969 |
| Rockfish | 7,596 | 7,152 | 5,798 | 6,560 | 4,761 | 4,447 | 4,145 | 4,630 | 4,924 | 5,778 |
| Sablefish | 4,310 | 5,263 | 4,175 | 3,508 | 4,721 | 3,724 | 4,295 | 4,892 | 4,873 | 6,222 |
| Salmon | 7,427 | 10,319 | 4,761 | 7,611 | 12,153 | 17,770 | 12,804 | 5,261 | 7,835 | 6 |
| Sardine, Pacific | 5,101 | 5,468 | 6,281 | 5,848 | 2,874 | 3,957 | 3,150 | 5,100 | 8,218 | 7,587 |
| Sea Urchins | 13,469 | 15,083 | 11,704 | 10,411 | 7,906 | 7,300 | 6,156 | 5,145 | 5,400 | 6,550 |
| Shrimp | 8,615 | 7,409 | 5,950 | 5,901 | 3,520 | 3,783 | 4,338 | 4,213 | 4,064 | 5,695 |
| Squid | 33,403 | 27,243 | 16,948 | 18,259 | 25,333 | 19,740 | 31,467 | 26,959 | 29,131 | 26,477 |
| Swordfish | 8,389 | 11,791 | 8,696 | 6,401 | 7,850 | 4,834 | 1,896 | 2,695 | 3,127 | 2,365 |

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

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Landings | 652,889 | 650,596 | 524,833 | 499,676 | 382,146 | 379,591 | 442,353 | 341,661 | 383,595 | 315,139 |
| Finfish & Shellfish | 429,579 | 372,270 | 321,527 | 321,539 | 252,764 | 257,944 | 301,993 | 203,107 | 258,625 | 216,450 |
| Crab | 9,605 | 7,671 | 4,841 | 8,609 | 23,922 | 27,016 | 12,028 | 27,391 | 12,393 | 9,830 |
| Lobster, Spiny | 493 | 707 | 697 | 702 | 736 | 860 | 761 | 886 | 663 | 738 |
| Rockfish | 9,660 | 7,194 | 5,291 | 5,991 | 4,399 | 3,843 | 3,181 | 3,252 | 3,136 | 3,933 |
| Sablefish | 4,357 | 4,176 | 3,434 | 2,893 | 3,636 | 3,158 | 3,645 | 3,617 | 3,240 | 3,506 |
| Salmon | 4,422 | 5,912 | 2,761 | 5,661 | 7,328 | 7,113 | 4,962 | 1,184 | 1,743 | 1 |
| Sardine, Pacific | 131,614 | 118,193 | 114,235 | 128,584 | 76,528 | 97,509 | 76,324 | 102,683 | 178,480 | 127,435 |
| Sea Urchins | 14,218 | 15,210 | 13,128 | 14,176 | 11,107 | 12,219 | 11,304 | 10,664 | 11,131 | 10,283 |
| Shrimp | 8,063 | 5,793 | 5,598 | 5,867 | 3,498 | 3,520 | 2,944 | 1,197 | 2,015 | 3,011 |
| Squid | 203,059 | 262,134 | 190,278 | 160,665 | 99,088 | 88,167 | 122,887 | 108,410 | 109,150 | 84,072 |
| Swordfish | 4,455 | 5,856 | 4,837 | 3,803 | 4,706 | 2,613 | 653 | 1,187 | 1,210 | 1,168 |

Average Annual Price for Key Species / Species Groups (price per pound)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|------------------|------|------|------|------|------|------|------|------|-------|-------|
| Crab | 1.90 | 1.99 | 2.20 | 1.75 | 1.57 | 1.61 | 1.63 | 1.70 | 2.31 | 2.46 |
| Lobster, Spiny | 7.39 | 6.67 | 6.42 | 6.81 | 7.18 | 7.16 | 7.93 | 9.15 | 10.44 | 10.80 |
| Rockfish | 0.79 | 0.99 | 1.10 | 1.10 | 1.08 | 1.16 | 1.30 | 1.42 | 1.57 | 1.47 |
| Sablefish | 0.99 | 1.26 | 1.22 | 1.21 | 1.30 | 1.18 | 1.18 | 1.35 | 1.50 | 1.77 |
| Salmon | 1.68 | 1.75 | 1.72 | 1.34 | 1.66 | 2.50 | 2.58 | 4.44 | 4.50 | 4.16 |
| Sardine, Pacific | 0.04 | 0.05 | 0.05 | 0.05 | 0.04 | 0.04 | 0.04 | 0.05 | 0.05 | 0.06 |
| Sea Urchins | 0.95 | 0.99 | 0.89 | 0.73 | 0.71 | 0.60 | 0.54 | 0.48 | 0.49 | 0.64 |
| Shrimp | 1.07 | 1.28 | 1.06 | 1.01 | 1.01 | 1.07 | 1.47 | 3.52 | 2.02 | 1.89 |
| Squid | 0.16 | 0.10 | 0.09 | 0.11 | 0.26 | 0.22 | 0.26 | 0.25 | 0.27 | 0.31 |
| Swordfish | 1.88 | 2.01 | 1.80 | 1.68 | 1.67 | 1.85 | 2.90 | 2.27 | 2.58 | 2.02 |

2008 Economic Impacts of Recreational Fishing Expenditures (thousands of dollars)

| Impact Category | Jobs | Total Sales | Value Added |
|--|---------------|------------------|----------------|
| Trip Impacts by Fishing Mode: | | | |
| For-Hire | 1,358 | 147,341 | 84,088 |
| Private Boat | 800 | 107,194 | 57,182 |
| Shore | 1,961 | 226,582 | 123,602 |
| Total Durable Equipment Impacts | 7,710 | 1,282,892 | 658,940 |
| Total State Trip and Durable Equipment Economic Impacts | 11,830 | 1,764,010 | 923,811 |

2008 Angler Trip & Durable Equipment Expenditures (thousands of dollars)

| Fishing Mode | Trip Expenditures | | Durable Equipment Expenditures | Expenditures |
|--|-------------------|-----------|--------------------------------------|------------------|
| | Non-Residents | Residents | | |
| For-Hire | 16,188 | 75,584 | Fishing Tackle | 478,003 |
| Private Boat | 242 | 76,555 | Other Equipment | 188,723 |
| Shore | 1,492 | 164,130 | Boat Expenses | 131,898 |
| Total Trip Expenditures | 17,923 | 316,268 | Vehicle Expenses | 184,394 |
| | | | Second Home Expenses | 91,791 |
| | | | Total Durable Equipment Expenditures | 1,074,810 |
| Total State Trip and Durable Equipment Expenditures | | | | 1,409,001 |

Recreational Anglers by Residential Area (thousands of anglers)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Coastal | 748 | 959 | 948 | 1,110 | 1,113 | 865 | 740 | 991 | 878 | 819 |
| Non-Coastal | 184 | 244 | 298 | 379 | 378 | 280 | 263 | 335 | 226 | 246 |
| Out of State | 92 | 109 | 117 | 111 | 115 | 98 | 79 | 109 | 65 | 83 |
| Total Anglers | 1,024 | 1,312 | 1,362 | 1,600 | 1,606 | 1,243 | 1,082 | 1,435 | 1,168 | 1,148 |

Recreational Fishing Effort by Mode (thousands of trips)¹

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|--------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| For-Hire | 615 | 631 | 588 | 569 | 483 | 521 | 504 | 522 | 489 | 424 |
| Private Boat | 2,113 | 2,812 | 2,861 | 2,905 | 3,117 | 708 | 902 | 896 | 768 | 640 |
| Shore | 1,447 | 2,006 | 2,238 | 2,501 | 2,699 | 3,509 | 3,216 | 3,802 | 3,072 | 3,100 |
| Total Trips | 4,175 | 5,449 | 5,687 | 5,975 | 6,299 | 4,738 | 4,622 | 5,220 | 4,329 | 4,164 |

Harvest (H) and Release (R) of Key Species / Species Groups (number of fish in thousands)^{1,2}

| Species/Groups | | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|--|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Barracuda, Bass, & Bonito ³ | H | 1,262 | 2,493 | 1,720 | 1,965 | 1,888 | 2,126 | 1,015 | 668 | 537 | 434 |
| | R | 2,087 | 4,210 | 3,502 | 4,427 | 3,727 | 2,597 | 2,011 | 1,660 | 1,407 | 1,093 |
| Croakers | H | 524 | 541 | 631 | 1,513 | 758 | 619 | 572 | 456 | 427 | 321 |
| | R | 600 | 751 | 737 | 1,016 | 871 | 660 | 618 | 553 | 631 | 272 |
| Flatfishes | H | 336 | 780 | 556 | 962 | 603 | 410 | 478 | 241 | 187 | 276 |
| | R | 644 | 1,034 | 1,043 | 1,844 | 850 | 295 | 465 | 471 | 292 | 313 |
| Greenlings | H | 122 | 102 | 109 | 215 | 357 | 72 | 125 | 104 | 69 | 48 |
| | R | 101 | 249 | 297 | 641 | 717 | 239 | 179 | 113 | 67 | 53 |
| Mackerels | H | 479 | 587 | 1,356 | 800 | 918 | 945 | 1,023 | 1,158 | 823 | 940 |
| | R | 812 | 1,319 | 2,600 | 1,730 | 2,011 | 1,715 | 1,872 | 3,287 | 1,209 | 1,765 |
| Rockfishes & Scorpionfishes | H | 3,737 | 2,753 | 2,585 | 2,116 | 3,035 | 1,778 | 2,725 | 1,891 | 1,674 | 1,318 |
| | R | 721 | 582 | 720 | 844 | 1,621 | 701 | 1,058 | 668 | 456 | 402 |
| Salmon | H | 103 | 206 | 115 | 201 | 109 | 256 | 167 | 119 | 59 | (1) |
| | R | 48 | 49 | 46 | 40 | 39 | 103 | 71 | 74 | 36 | (1) |
| Sculpins | H | 60 | 46 | 82 | 60 | 70 | 41 | 39 | 25 | 19 | 29 |
| | R | 126 | 132 | 206 | 184 | 140 | 98 | 87 | 74 | 58 | 78 |
| Surfperches | H | 498 | 404 | 630 | 586 | 878 | 1,046 | 694 | 913 | 610 | 581 |
| | R | 213 | 264 | 432 | 563 | 1,016 | 1,402 | 1,083 | 1,516 | 702 | 658 |
| Tuna, Albacore, & Other | H | 175 | 164 | 127 | 107 | 146 | 49 | 6 | 9 | 22 | 5 |
| | R | 14 | 37 | 33 | 6 | 83 | 10 | 2 | 3 | 7 | (1) |

¹Due to changes in data collection methods, California's effort (number of trips) and catch (number of fish harvested or released) estimates for 1999-2003 are not comparable to 2004-2008 estimates.

²In this table, "(1)" = 0-999 fish were harvested or released.

³Species included in this group 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 (\$ millions) | Employee Compensation (\$ millions) ¹ | Gross State Product (\$ millions) | Commercial Location Quotient ² |
|----------|----------------|------------------|---------------------------------|--|---|--|
| 1998 | 773,925 (11%) | 12,026,989 (11%) | 406,481 (12%) | 769,101 (13%) | 1,085,884 (13%) | 1.0 |
| 2007 | 891,997 (112%) | 13,771,650 (11%) | 653,887 (13%) | 1,014,973 (17%) | 1,801,762 (13%) | 0.71 |
| % change | 15.3% | 14.5% | 60.9% | 31.9% | 65.9% | -29.0% |

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

| | | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|---|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Seafood product preparation & packaging | Firms | 61 | 72 | 71 | 70 | 77 | 98 | 88 | 91 | 121 |
| | Receipts | 10,592 | 11,405 | 12,983 | 9,123 | 9,858 | 14,312 | 10,207 | 8,298 | 10,842 |
| Seafood Sales, retail | Firms | 180 | 166 | 157 | 165 | 192 | 193 | 166 | 163 | 222 |
| | Receipts | 19,315 | 19,270 | 18,138 | 18,225 | 19,771 | 19,092 | 16,892 | 19,875 | 19,703 |

Seafood Sales & Processing – Employer Establishment (thousands of dollars)

| | | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|---|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Seafood product preparation & packaging | Establishments | 70 | 78 | 73 | 63 | 60 | 55 | 48 | 47 | 49 |
| | Employees | 2,777 | 3,289 | 2,962 | 3,357 | 2,896 | 2,931 | 2,963 | 2,592 | 2,229 |
| | Payroll | 60,251 | 75,858 | 66,387 | 82,116 | 74,637 | 72,178 | 92,642 | 78,065 | 75,886 |
| Seafood sales, wholesale | Establishments | 337 | 360 | 361 | 334 | 269 | 263 | 258 | 252 | 300 |
| | Employees | 3,793 | 4,174 | 4,507 | 4,539 | 3,536 | 3,744 | 3,925 | 4,063 | 4,429 |
| | Payroll | 115,021 | 128,092 | 142,656 | 151,789 | 115,669 | 124,657 | 134,576 | 144,758 | 159,672 |
| Seafood sales, retail | Establishments | 170 | 172 | 165 | 186 | 175 | 169 | 180 | 184 | 182 |
| | Employees | 902 | 828 | 917 | 988 | 968 | 945 | 999 | 1,031 | 1,004 |
| | Payroll | 12,906 | 13,815 | 15,172 | 16,775 | 19,919 | 16,686 | 18,832 | 19,900 | 21,224 |

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

| | | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|--|----------------|-----------------|---------|---------|-----------|-----------|-----------|-----------|-----------|-----------|
| Coastal & Great Lakes freight transportation | Establishments | 22 | 24 | 31 | 31 | 22 | 20 | 26 | 22 | 29 |
| | Employees | ND ³ | 1,394 | 1,648 | 1,776 | 1,341 | ND | 1,346 | ND | ND |
| | Payroll | ND | 99,106 | 119,808 | 132,432 | 117,982 | ND | 129,262 | ND | ND |
| Deep sea freight transportation | Establishments | 50 | 44 | 43 | 44 | 51 | 50 | 54 | 54 | 51 |
| | Employees | ND | 1,323 | 1,117 | ND | 902 | 901 | ND | 957 | 1,643 |
| | Payroll | ND | 51,131 | 63,891 | ND | 62,417 | 69,815 | ND | 84,199 | 116,628 |
| Deep sea passenger transportation | Establishments | 10 | 8 | 9 | 11 | 14 | 15 | 15 | 16 | 13 |
| | Employees | ND | ND | ND | ND | ND | ND | ND | 1,552 | ND |
| | Payroll | ND | ND | ND | ND | ND | ND | ND | 72,119 | ND |
| Marinas | Establishments | 265 | 266 | 249 | 248 | 263 | 271 | 263 | 268 | 276 |
| | Employees | 1,925 | 2,000 | 1,862 | 1,851 | 2,485 | 2,476 | 2,426 | 2,457 | 2,680 |
| | Payroll | 44,511 | 50,106 | 52,602 | 57,393 | 70,640 | 73,338 | 71,318 | 74,778 | 80,216 |
| Marine cargo handling | Establishments | 53 | 66 | 70 | 64 | 56 | 54 | 54 | 52 | 56 |
| | Employees | 9,288 | 15,330 | 15,076 | 15,274 | 15,557 | 20,456 | 19,303 | 20,975 | 22,395 |
| | Payroll | 836,880 | 880,397 | 944,374 | 1,000,809 | 1,040,515 | 1,179,221 | 1,273,698 | 1,448,623 | 1,484,308 |
| Navigational services to shipping | Establishments | 49 | 42 | 37 | 30 | 35 | 38 | 37 | 36 | 39 |
| | Employees | 806 | 702 | 647 | 476 | 850 | ND | ND | 817 | 858 |
| | Payroll | 33,164 | 35,480 | 33,764 | 28,197 | 53,162 | ND | ND | 63,893 | 63,610 |
| Port & harbor operations | Establishments | 24 | 23 | 21 | 23 | 19 | 20 | 20 | 20 | 18 |
| | Employees | 649 | 650 | 163 | 139 | 417 | ND | ND | 582 | 443 |
| | Payroll | 19,023 | 19,056 | 9,990 | 7,668 | 23,110 | ND | ND | 32,523 | 30,001 |
| Ship & boat building | Establishments | 144 | 143 | 155 | 145 | 141 | 143 | 141 | 132 | 136 |
| | Employees | 9,166 | 9,204 | 8,589 | 7,782 | 8,574 | 8,865 | 10,132 | 9,801 | 9,250 |
| | Payroll | 329,705 | 335,172 | 322,296 | 315,090 | 314,706 | 354,404 | 410,446 | 453,255 | 433,846 |

¹Employee Compensation data for 1998 were not available. Data from 2001 are reported here.

²The U.S. Commercial Fishing Location Quotient (CFLQ) of 1.0 represents the national baseline from which state CFLQs can be compared.

³ND = Data are suppressed due to confidentiality restrictions.