Management Context

The Gulf Region is comprised of Texas, Louisiana, Mississippi, Alabama and West Florida. Federal fisheries in this region are managed by the Gulf of Mexico Fishery Management Council (GMFMC) and NOAA Fisheries (NMFS) under seven fishery management plans (FMPs). The spiny lobster and coastal migratory pelagic resources fisheries are managed in conjunction with the South Atlantic Fishery Management Council (SAFMC).

Gulf of Mexico Fishery Management Plans

1. Red Drum
2. Shrimp
3. Stone Crab
4. Reef Fish
5. Coastal Migratory Pelagic Resources (with SAFMC)
6. Spiny Lobster (with SAFMC)
7. Coral and Coral Reefs

Of the species or species groups covered in these fishery management plans, red snapper, greater amberjack, gag, and gray triggerfish are currently overfished. Of these species or species groups, only red snapper is not currently subject to overfishing.

There are two limited access privilege programs (LAPP), a type of catch share program, currently in operation in the Gulf Region. The Gulf of Mexico red snapper fishery has been managed as an individual fishing quota (IFQ) fishery since 2007. A second IFQ program for Gulf of Mexico grouper and tilefish was implemented in 2010.

Commercial Fisheries

In 2008, commercial fishermen in the Gulf of Mexico harvested 1.27 billion pounds of finfish and shellfish that earned $659 million in total landings revenue. Shellfish landings generated 78% of total revenue in the region ($513 million). Shrimp was a significant component of total revenue (56% of total revenue), generating $366 million in 2008 for 188 million pounds of catch. Menhaden had the highest landings of any key species or species group with over 927 million pounds landed in 2008. This species accounted for 73% of total landings in the Gulf. At $0.07 per pound, this low value species generated $64.4 million in revenue or 10% of total revenue generated across the region.

Total revenue generated by fishermen in Louisiana and Texas was highest in the Gulf with $273 million and $176 million, respectively. West Florida ($122 million), Alabama ($44.3 million), and Mississippi ($43.7 million) followed in total revenue of finfish and shellfish. In terms of landings, Louisiana (916 million pounds) and Mississippi (202 million pounds) harvested the most catch in the region. Menhaden contributed most to these total landings with 738 million pounds and 189 million pounds landed, respectively. Texas (73 million pounds), West Florida (60 million pounds), and Alabama (24 million pounds) followed. Shrimp contributed $130 million to Louisiana's landings revenue with 89 million pounds harvested in 2008. However, shrimp revenue in Texas was higher at $157 million for 63.9 million pounds landed.

Economic Impacts[1]

In 2008, the Gulf Region's seafood industry generated $5.7 billion in sales in Florida, $2 billion in Louisiana, and $1.1 billion in Texas. Most of the seafood industry-related jobs in this region were also sustained in these states with 108,600 full- and part-time jobs in Florida, 44,000 jobs in Louisiana, and 42,500 jobs in Texas. Alabama (9,800 jobs) and Mississippi (8,600 jobs) followed in terms of employment supported by the seafood industry. Florida, Louisiana, and Texas also led the region in income impacts generated by the seafood industry with $3.1 billion, $1.1 billion, and $990 million, respectively.

Landings Revenue

In 2008, ex-vessel revenue from finfish and shellfish harvest totaled $659 million, a 20% decrease (36% in real terms) from 1999 ($823 million) and a 4% decrease (9% decrease in real terms) from 2007 ($690 million). Louisiana fishermen generated 41% of this revenue in 2008 ($273 million). Shellfish revenue accounted for 78% of total revenue in the Gulf, bringing in $513 million in 2008. This was a 20% decrease (36% in real terms) from 1999 ($645 million) and a 6% decrease (15% in real terms) from 2007 ($544 million). Finfish revenue decreased 18% (35% in real terms) from $178 million in 1999 to $146 million in 2008. Finfish revenue between 2007 and 2008 increased 0.25% (9.5% decrease in real terms).

Key Gulf of Mexico Commercial Species

- Blue crab
- Stone crab
- Crawfish
- Groupers
- Menhaden
- Mullets
- Oyster
- Shrimp
- Red snapper
- Tunas

Total revenue decreased in real terms in all Gulf States from 1999-2008: 26% (35% in real terms) in **West Florida**, 10% (25% in real terms) in **Mississippi**, 21% (56% in real terms) in **Texas**, 6% decrease (35% in real terms) in Louisiana, and 12% decrease (30% in real terms) in Alabama. Shellfish revenue followed this declining trend with the largest decrease in West Florida (38%, 50% in real terms) followed by Mississippi (29%, 43% in real terms), Texas (21%, 36% in real terms), Louisiana (12%, 29% in real terms), and Alabama (16%, 33% in real terms).

Finfish revenue trends were more variable than the shellfish trends across the Gulf States largely due to the effect of lost oyster beds on total shellfish revenues from Hurricane Katrina in 2005. Mississippi (37% increase, 9.6% in real terms) and Alabama (47%, 18% in real terms) experienced increases over the 10 year period. In Mississippi, this increase was largely due to menhaden revenue which increased 55% (24% in real terms) from $12 million (1999) to $19 million (2008). Large increases in revenue generated from sharks (34,400%, 27,490% in real terms), vermillion snapper (1,534%, 1,207% in real terms), and Spanish mackerel (343%, 254% in real terms)

[1]Economic impacts for commercial fisheries reported here are for the state of Florida, not West Florida.

drove **Alabama's** finfish revenue trend. In contrast, finfish revenue in West Florida (0.40%, 20% in real terms) and **Texas** (19%, 35% in real terms) experienced modest decreases, while Louisiana's finfish revenue experienced a larger decrease (37%, 49% in real terms).

Commercial Fish Facts

Landings revenue

- The Gulf's key species and species groups accounted for an average of 91% of total landings revenue from 1999-2008.
- Shrimp accounted for the majority of total landings revenue in the region, averaging $424 million over the 10 year time period. Fishermen in Texas generated most of this total in 2008, followed by Louisiana, West Florida, Alabama, and Mississippi.
- Crawfish revenue decreased 93% from 1999-2000, the largest annual decrease. This was followed by an 1,144% increase from 2000-2001, the largest annual increase.

Landings

- The Gulf's key species and species groups accounted for an average of 96% of total landings annually between 1999 and 2008.
- Menhaden was a significant component of total landings over the 10 year time period, averaging 1.1 billion pounds annually. Fishermen in Louisiana harvested the majority of this species.
- Crawfish landings decreased 97% from 1999-2000, the largest annual decrease, only to have the largest annual increase the following year, increasing 2,549% from 2000-2001.

Prices

- Stone crab had the highest ex-vessel price over the 10 year time period, averaging $4.12 per pound. Tunas ($2.85), red snapper ($2.56), oyster ($2.49), and groupers ($2.30) all averaged over $2 per pound.
- Menhaden had the lowest average ex-vessel price at $0.05 per pound. Mullets ($0.67), blue crab ($0.72), and crawfish ($0.76) averaged under $1 per pound.
- The largest annual increase in ex-vessel price was 120% for crawfish from 1999-2000. Crawfish also had the largest annual decrease the following year, decreasing -53% from 2000-2001.

Shrimp contributed more to the Gulf Region's total revenue over the ten year period from 1999 to 2008 than any other key species or group: $424 million or 58% of total revenue. The shrimp revenue in 2008 was a 24% less (38% in real terms) than the 1999 shrimp revenue ($479 million) and there was a less than 1% decrease (10% in real terms) relative to 2007 ($367 million). Oyster (23% increase, but a 2% decrease in real terms), crawfish (12% decrease, 29% in real terms), and mullets (58% decrease, 62% in real terms) also experienced large changes in revenue between 1999 and 2008.

Other Gulf of Mexico key species or species groups with large changes in state landings revenue from 1999-2008 include: vermillion snapper (1,500% increase), and sharks (34,400% increase), oysters (74% decrease), red snapper (69% increase), and menhaden (70% decrease) in **Alabama;** red snapper (201% increase), oyster (48% increase), quahog clams (87% decrease), and shrimp (42% decrease) in **West Florida;** king mackerel (64% increase), mullets (86% decrease), and red snapper (64% decrease) in **Louisiana;** blue crab (34% decrease), mullets (91% decrease), flounders (75% decrease), oysters (54% increase), and shrimp (42% decrease) in **Mississippi;** and vermillion snapper (139% increase), oysters (36% decrease), Atlantic croaker (46% increase), and flounders (76% decrease) in **Texas.**

Landings

Commercial fishermen in the Gulf Region landed over 1.27 billion pounds of finfish and shellfish in 2008. This was an 36% decrease from the 2.0 billion pounds landed in 1999 and 9% decrease from 2007. Over 72% of total landings were harvested in Louisiana. Finfish were a significant component of landings totals (78% of total landings) with Gulf fishermen harvesting 990 million pounds in 2008. This was a 39% decrease from 1999 (1.6 billion pounds) but a 7% decrease from 2007 (1 billion pounds). Shellfish landings also declined, decreasing 23% from 1999 to 2008 and decreasing 15% from 2007-2008.

Finfish landings decreased in all five Gulf states between 1999 and 2008. Louisiana (43%) had the largest decrease followed by Texas (40%), Mississippi (23%), West Florida (22%), and Alabama (4%).

Shellfish landings also decreased in all five states in the region. The largest decrease was observed in West Florida (48%), Mississippi (36%), followed by Texas (20%), and Louisiana (19%), and Alabama (13%). Menhaden contributed 73% to total landings in 2008 with most of this catch harvested in Louisiana (738 million pounds) and Mississippi (189 million pounds). Between 1999 and 2008, menhaden harvest decreased 39% and decreased 8% between 2007 and 2008. From 1999-2008 Menhaden landings decreased 39%. Menhaden catch in Louisiana mirrored these trends, decreasing 43% from 1999 to 2008 and decreasing 8% from 2007 to 2008. Mississippi's menhaden harvest decreased 21% from 1999-2008 and 12% from 2007 to 2008.

Other key species or species groups in the Gulf Region with large changes in landings between 1999 and 2008 include: sharks (14,000% increase), vermillion snapper (1050% increase), Spanish mackerel (249% increase), and oysters (81% decrease) in **Alabama;** red snapper (81% increase), blue crab (76% increase), quahog clam (83% decrease), and shrimp (38% decrease) in **West Florida**; mullets (83% decrease) and tunas (73% decrease) in **Louisiana**; flounders (81% decrease) and mullets (89% decrease), and blue crabs (51% decrease) in **Mississippi;** and vermillion snapper (87% increase) and flounders (80% decrease) in **Texas**.

Prices

Overall, in 2008 the ex-vessel price for seven of the ten key species or species groups was higher than their 10 year average annual price per pound. From 1999 to 2008 large changes included tuna (77% increase), red snapper (71% increase), oyster (45% increase); stone crab (27% decrease), and crawfish (24% decrease).

Between 2007 to 2008, stone crab had the largest decrease in price (31%), and menhaden (17%). Shrimp (19%) and tuna (13%) experienced double digit increases. All other key species or groups experienced single digit changes.

Across the Gulf Region, other key species or groups with large changes in ex-vessel price from 1999 to 2008 include: sharks (110% increase), menhaden (175%), red snapper (92%), oyster (37%), and shrimp (11% decrease) in **Alabama**; lobsters (48% increase), red snapper (67%), blue crab (77%), and quahog clam (22% decrease) in **West Florida**; red snapper (82% increase), king mackerel (76%), oyster (42%), and tuna (78%) in **Louisiana**; menhaden (100%), oyster (64%), blue crab (33%), in **Mississippi**; and Atlantic croaker (28%), red snapper (54%), oysters (53%), tuna (86%) and grouper (61%) in **Texas**.

Recreational Fishing

There were 3.2 million resident recreational fishermen who took a fishing trip in the Gulf of Mexico Region in 2008. Almost 92% of these anglers were residents of a regional coastal county. Of the 24 million fishing trips taken in 2008, over 60% of them were taken from a private or rental boat. The most commonly caught key species or species group was spotted seatrout with 32.6 million fish harvested or released in 2008. This key species accounted for 49% of fish caught by anglers in the Gulf Region.

Key Gulf Recreational Species

- Drum (Atlantic croaker)
- Drum (Gulf and southern kingfish)
- Drum (sand and silver seatrout)
- Drum (spotted seatrout)
- Red drum
- Southern flounder
- Spanish mackerel
- Striped mullet
- Porgies (sheepshead)
- Red snapper

Economic Impacts and Expenditures

Recreational fishing activities in West Florida supported more jobs than any other state in the Gulf Region with approximately 54,600 full- and part-time jobs supported in 2008. Louisiana (25,600 jobs), Texas (25,500 jobs), Alabama (4,700 jobs), and Mississippi (2,900 jobs) followed in terms of employment impacts from angler fishing trips and durable equipment expenditures. The majority of these jobs were related to durable equipment expenditures: 92% in Mississippi, 91% in Texas, 84% of jobs in Louisiana, 80% of jobs in West Florida, and 67% in Alabama.

In terms of employment impacts related to fishing trips taken by anglers, industries that provided services for shore-based fishing trips supported most of the trip-related full-and part-time jobs in West Florida (4,800 jobs) and Alabama (600 jobs). Private or rental boat trips supported most of the trip-related jobs in Louisiana (2,600 jobs), Texas (1,300 jobs), and Mississippi (146 jobs).

The contribution of recreational fishing activities in the Gulf Region are also reported in terms of state level sales and value-added impacts as well as expenditures on fishing trips and durable equipment. In 2008, in-state sales and value-added impacts were highest in West Florida ($5.65 billion in sales impacts; $3.1 billion in value-added impacts) and Texas ($3.3 billion ; $1.7 billion). Louisiana ($2.3 billion; $1.2 billion), Alabama ($455 million; $235 million), and Mississippi ($383 million; $149 million) followed in sales and value-added impacts. Across the region, these economic impacts were largely generated from direct expenditures on durable equipment made by anglers rather than fishing trip-related expenditures.

Total fishing trip and durable equipment expenditures were $12.5 billion across the Gulf of Mexico Region in 2008. Approximately 89% of these expenditures were related to durable equipment purchases. Boat ($5.8 billion), fishing tackle ($1.7 billion), and vehicle expenses ($1.5 billion) accounted for the majority of durable equipment expenditures. Expenditures by Gulf of Mexico residents related to fishing trips totaled $866 million. Most of these purchases were related to fishing trips taken from a private or rental boat (70% of trip-related expenditures by residents). The region's non-resident anglers generated $582 million in trip-related expenditures with most of these expenses related to fishing trips taken from shore (48% of trip-related expenditures by non-residents).

Participation[2]

In 2008, there were nearly 3.2 million recreational fishermen from either a coastal or non-coastal county in the Gulf of Mexico Region.[3] This was a 61% increase from 1999 (2.0 million anglers) but a 10.5% decrease from 2007 (over 3.6 million anglers). The number of coastal county anglers in 2008 (2.9 million anglers) increased 60% relative to 1999 (1.8 million anglers) but decreased 9.6% relative to 2007 (3.2 million anglers). Non-coastal county angler participation in 2008 (262,000 anglers) increased 73.5% relative to 1999 (151,000 anglers) and decreased 19.6% relative to 2007 (326,000 anglers). Approximately 57% of the total number of resident anglers in the Gulf region were located in West Florida.

The majority of recreational fishermen in Louisiana and Mississippi were residents of a coastal county within their respective state. These anglers accounted for 73% of total anglers in Louisiana (795,000 anglers) and 61% of anglers in Mississippi (119,000 anglers). Out-of-state residents made up the majority of anglers in West Florida and Alabama: 53% of total anglers in West Florida (2.0 million anglers) and 43% of total anglers in Alabama (240,000 anglers). Anglers from the Gulf Region's non-coastal counties[4] comprised a minority of total anglers in 2008: 11% of anglers in Louisiana, 13% of anglers in Mississippi, and 21% of anglers in Alabama.

Fishing Trips

Anglers took 24 million fishing trips in 2008. This was a 52% increase from 1999 (16 million trips) and a 1%

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[2]These estimates do not include Texas. Participation (number of anglers) and effort (number of fishing trips) information for Texas was not available for this report.
[3]At the state level, out-of-state anglers are estimated. However at the region level, out-of-region anglers are not estimated thus only Gulf Region resident anglers are discussed here. In *Fisheries Economics of the U.S., 2006* (FEUS 2006), angler participation totals from 1997-2006 incorrectly included out-of-state anglers at the region level. In this report, the 1999-2008 angler participation totals excludes these anglers and so the annual region totals reported here are smaller than those reported in FEUS 2006.
[4]All resident anglers in Florida are considered coastal county anglers.

decrease from 2007 (24.3 million trips). In 2008, most fishing trips were taken from a private or rental boat: 14.6 million fishing trips or 60% of total trips taken in the Gulf of Mexico. Shore-based fishing trips ranked second in popularity with 8.7 million trips taken in 2008 despite a 2.9% decrease in trips taken between 2007 and 2008. Approximately 839,000 fishing trips were taken from a for-hire boat.

There were approximately 17 million fishing trips taken in West Florida in 2008. This represented 71% of total trips taken in the region. Most of these trips were taken from a private or rental boat (57% of trips taken in West Florida). Private or rental boat trips were also popular in Louisiana and Mississippi: 75% of trips in Louisiana and 61% of trips in Mississippi. In Alabama, private boat rentals (57%) were the most popular mode in 2008. Shore-based (40% of trips) were the second most popular fishing mode in Alabama.

Harvest and Release

Of the Gulf Region's key species and species groups, spotted seatrout was the most often caught by anglers with 32.6 million fish caught in 2008. This key species accounted for 49% of the key species or species groups caught by recreational fishermen. Over 60% of these spotted seatrout were released by anglers rather than harvested. Red drum was another key species that was caught in large numbers: over 9.7 million fish caught in 2008 with 67% of these fish released rather than harvested. These fish were most often caught in West Florida and Louisiana.

In 2008, five of the Gulf Region's key species or species groups were more often harvested rather than released by anglers: striped mullet (81.7% harvested), southern flounder (78% harvested), Gulf and southern kingfish (69% harvested), sand and silver seatrout (60% harvested), and sheepshead (55% harvested). Red snapper (73% released) and Atlantic croaker (67% released) were examples of key species or groups with a greater percentage of fish released rather than harvested.

Of the Gulf's key species or species groups, Spanish mackerel (44.3% increase), red drum (58%), and spotted seatrout (29%) experienced the largest increases in recreational catch between 1999 and 2008. The following Gulf key species decreased in catch from 1999 to 2008; Gulf and southern kingfish (4% decrease), sand and silver seatrout (15% decrease), southern flounder (7.5% decrease), striped mullet (15 % decrease), and red snapper (18% decrease). All other key species or groups increased during this period.

Between 2007 and 2008, two key species or species groups experienced double digit percentage declines: southern flounder and red snapper. Catch totals for the other key species or groups experienced changes in catch totals of less than 10%. Significant (double digit) increases in catch were experienced by Gulf and southern kingfish (16%), sand and silver seatrout (26%), and sheepshead (35%). All other key species that increased from 2007-2008 experienced an increase of less than 10%.

Recreational Fishing Facts

Participation
- In the Gulf of Mexico, an average of 3.1 million anglers fished annually from 1999-2008. Most of these anglers fished in West Florida.
- The region's coastal county residents made up 92% of total anglers both in 2008 over the ten year time period.
- Non-coastal county resident anglers increased 66% from 2005-2006 experienced the largest annual increase in participation. These anglers also had the largest annual decrease in participation, decreasing 40% from 2004-2005. In 2008, non-coastal county residents decreased nearly 20% from 2007.

Fishing trips
- An average of 22 million fishing trips were taken annually in the Gulf Region between 1999 and 2008. Most of these trips were taken in West Florida.
- Private or rental boat trips accounted for 14.6 million fishing trips in 2008. This mode of fishing trip made up 61% of trips taken that year.
- The largest annual increase in fishing trip mode was a 43% increase in shore-based fishing trips from 1999-2000. This type of fishing trip also had the largest annual decrease over the time period, a 26% decrease from 2001-2002.

Harvest and release
- The key species or species group in the Gulf of Mexico that were most often caught was spotted seatrout with an average of 28 million fish caught over the 10 year time period. Over 62% of these fish was released rather than harvested.
- Six of the Gulf's ten key species or groups were more often released rather than harvested by recreational fishermen from 1999 to 2008. Atlantic croaker (70% released), red drum (67%), red snapper (68%), and spotted seatrout (62%) are examples.
- Key species or groups more often harvested by anglers were striped mullet (83% harvested), southern flounder (78%), sand and silver seatrout (70%), and Gulf and southern kingfish (69%).
- Spanish mackerel had the largest annual increase in catch, increasing 96% from 2005-2006. Gulf and southern kingfish had the largest annual decrease in catch, decreasing 53% from 2001-2002.

At the state level, spotted seatrout was the most commonly caught key species or species group in Louisiana, West Florida, Mississippi, and Texas. In 2008, nearly 20 million fish were caught in Louisiana, 10.5 million fish were caught in West Florida, 1.2 million fish were caught in Mississippi, and 920,000 fish were caught in Texas. Atlantic croaker was key species most often caught by recreational fishermen in Alabama with 2 million fish caught in 2008.

Marine Economy[5]

The Gulf of Mexico's gross domestic product was $2.35 trillion in 2007. Employee compensation totaled $1.23 trillion and annual payroll totaled $787 billion. These economic measures increased 77%, 39%, and 63%, respectively, from 1998 to 2007, and 25%, 21%, and 19%, from 2006 to 2007. Approximately 1.3 million establishments employed 21 million full- and part-time employees in 2007. This was a 15% increase in number of

[5]Information for 2007 is reported in this section; 2008 data were not available for this report.

establishments and a 19% increase in number of employees from 1998 to 2007. Increases were also observed from 2006 to 2007, 1.3% and 7.6%, respectively.

In 2007, Texas had the highest number of employees, annual payroll, employee compensation, and gross state product levels in the region, while Florida[6] had the highest establishment numbers. Florida had over 523,000 establishments that employed 7.43 million employees and Texas had 521,000 establishments that employed 9 million employees. Gross state product in Texas was $1.15 trillion, followed by Florida ($741 billion), Louisiana ($207 billion), Alabama ($165 billion), and Mississippi ($88 billion).

Louisiana had the highest commercial fishing location quotient (CFLQ) at 2.5 in 2007. This was a 36% increase from 1998 and a 10% increase from 2006. Louisiana's CFLQ suggests that the level of employment in commercial fishing-related industries in this state is more than two times higher than the level of employment in these industries nationwide.[7] Across the Gulf region, the CFLQ was also higher than the national baseline in Mississippi (1.96) but lower than the national CFLQ in Florida (0.99), Alabama (0.33), and Texas (0.32).

Seafood Sales and Processing

In 2007, there were 399 nonemployer firms engaged in seafood product preparation and packaging with annual receipt totals of $24 million. Respectively, this was a 64% and 34% increase (19% in real terms) relative to 1999 levels. Most of these firms were located in Florida and this state experienced the largest increases from 1999-2007 in this industry: 166% increase in number of firms and 47% increase (30% in real terms) in annual receipt totals. Louisiana also experienced large increases in firms (85%) and annual receipts (114%), while Alabama experienced a 40% decrease (47% in real terms) in annual receipts during this time period.

Employer establishments engaged in seafood product preparation and packaging totaled 132 in 2007. These establishments employed approximately 8,740 full-and part-time workers and generated $220 million in annual payroll. Region-wide, there was a 26% decrease in establishments engaged in this industry, a 23% decrease in employees, and a 8% increase in annual payroll totals (5% decrease in real terms). More of these establishments were located in Louisiana (31%) than anywhere else in the region, but the largest change in establishment numbers was observed in Florida, a 53% decrease from 1999 levels.

The Gulf of Mexico's seafood wholesale annual payroll totals increased 34% (19% in real terms) between 1999 and 2007 to $168 million in 2007. Establishment and employee numbers decreased 22% and 13%, respectively, to 546 establishments and approximately 4,700 full-and part-time employees. These declining trends were mirrored at the state level with the largest declines in Alabama (34% decrease in number of establishments) and Mississippi (52% decrease in number of employees, and 14% decrease in annual payroll (24% in real terms)). The payroll in Texas increased the most over this time period from $33 million in 1999 to $52 million in 2007, a 58% increase (40% in real terms).

In 2007, there were 815 seafood retail nonemployer firms with total annual receipts of $74 million across the region. This was a 27% increase in firm numbers and a 38% increase in annual receipts region-wide from 1999 to 2007. The largest state level increases in annual payroll occurred in Mississippi (72%, 53% in real terms) and Louisiana (51%, 34% in real terms). More of these firms were located in Florida (39%) than in any other state in the region.

Employer establishments engaged in seafood retail increased 19% across the Gulf of Mexico to 380 establishments in 2007. More of these establishments were located in Florida (44%) than in any other state in the region. Region-wide, this industry employed almost 2,000 full- and part-time workers with an annual payroll of $38 million in 2007. From 1999 to 2007, employee numbers increased 16% and annual payroll totals increased 21% (7% in real terms). At the state level, the largest changes were observed in Alabama with a 50% increase in establishments and 189% increase in payroll; Louisiana experienced a 56% increase in employees; Florida saw a 14% increase in employees and a 27% increase in establishments; there was a 140% increase (110% in real terms) in annual payroll in Louisiana, and in Texas there was a 28% decrease in annual payroll), and 27% decrease (36% in real terms) in number of employees.

Transport, Support, and Marine Operations

Marina industries had the highest number of establishments in this sector with 755 establishments region-wide in 2007. This was a 9% decrease relative to 1999 levels. Most of these industries were located in Florida (65%). At the state level, the largest decrease in marina-related establishments was in Louisiana (36%) and the largest increase was in marina-related payroll which experienced a 79% increase (59% in real terms) in Florida. Ship and boat building industries employed the most people in 2007 (48,000 full- and part-time workers) and had the highest annual payroll ($2.0 billion). Employment numbers decreased 2% from 1999-2007. Annual payroll totals increased 31% over this time period (16% in real terms) despite a 110% increase (83% in real terms) in Alabama.

Other industries with large to modest changes from 1999-2007 were: coastal and Great Lakes freight transportation (33% decrease in number of establishments in Mississippi); deep sea passenger transportation (300% increase in number of establishments in Texas and a 57% decrease in establishments in Louisiana); marina industries (32% increase in number of employees in Florida, 82% increase (61% in real terms) in annual payroll in Alabama and 79% increase (59% in real terms) in Florida); marine cargo handling (50% decrease in establishments in Mississippi and a 21% decrease in Florida); and port and harbor operations (61% increase in number of establishments in Florida and 60% decrease in establishments in Alabama).

[6]Information reported here is for the state of Florida, not West Florida.
[7]The CFLQ for the U.S. is 1.0. This provides a national baseline from which state CFLQs can be compared.