



FROM COD TO CARGO

The commercial fishing and seafood sector generates cargo for the domestic shipping trade between Puget Sound and Alaska. Northbound cargo includes gear and supplies for commercial fishing. Southbound cargo includes frozen fish.

Seafood also is one of the top international export commodities shipped out of the ports of Seattle and Tacoma, with a total value of \$638 million in 2016.

Commercial fishing and seafood processing are foundational to the region's maritime economy and ensuring that berth space is available for fishing boats is an important way of supporting our entire maritime industry.



BENEFITING OUR COMMUNITY



Larger commercial fishing boats drive demand for moorage space

The commercial fishing and seafood industry has long been an important part of the Puget Sound region's economy. The Washington State Maritime Cluster Study published in 2013 included the following data:



720 businesses in the state were engaged in commercial fishing and seafood processing, generating **\$8.6 billion** in business income.



Those businesses were responsible for **15,400 jobs** and **\$1.1 billion in wages**.

Today, some segments of the commercial fishing industry are building larger boats or increasing the size of existing boats to incorporate improved environmental and operational efficiencies.

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Port of Seattle
 P.O. Box 1209
 Seattle, WA 98111



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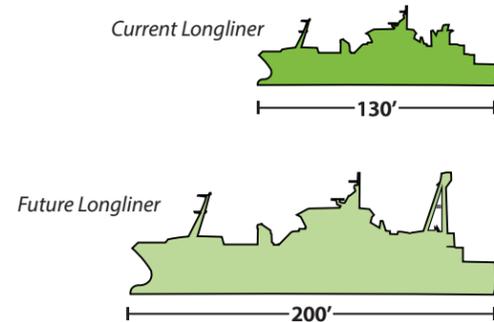
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Modernization and upsizing of the North Pacific Fishing Fleet

Modernizing the North Pacific commercial fishing fleet has become an increasingly important issue for Washington's maritime industry in recent years. With more than 400 federally permitted vessels over 58 feet, and an average age of 40 years, the need to replace (or refurbish) older vessels represents significant economic opportunity for the region.

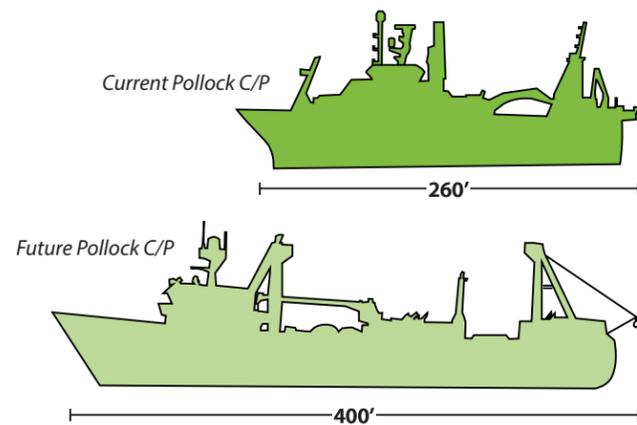
FREEZER LONGLINE FLEET

- Most of the freezer longline vessels homeported in Seattle fish for Pacific Cod in Alaska.
- The fish are partially processed and frozen at-sea.
- Most of the boats are in the 130 to 150-foot range.
- The new freezer longline vessels entering service are 175 to 200 feet in length.
- Six freezer longline boats are expected to be replaced by larger vessels over the next 10 years.



POLLOCK CATCHER/PROCESSORS

- Pacific Pollock stocks in Alaskan waters are abundant and well-managed.
- Most of the boats have on-board processing/freezing capability.
- Current boats range in size from 260 to 380 feet, with a majority of them less than 315 feet.
- At least four boats are expected to be replaced over the next 10 years with new vessels in the 350 to 400-foot range.



HEAD & GUT FLEET

- The Head & Gut Fleet fishes in Alaska for a variety of species including sole, plaice, flounder and cod.
- On-board processing is limited to removal of heads and entrails, and freezing the fish.
- Boats range in size from 150 to 260 feet.
- Although new boats are not expected to be significantly larger than existing boats, at least four additional vessels are expected over the next decade.



LARGER AND MORE BOATS REQUIRE MORE BERTH SPACE

The Port of Seattle is conducting a study on future fishing boat berthing needs to determine if investments in current port properties or property acquisitions are needed to retain the economic benefits of being the homeport of the North Pacific fleet.

The fishing fleets support a wide range of vendors, suppliers and skilled trade workers in the Puget Sound region. The Washington State Maritime Cluster Study included the following data on the Boat and ship building/maintenance/repair sector, and the maritime support services sector

There were 150 Boat and ship building/maintenance/repair firms in the state.

- The firms employed 16,500 people and generated \$1.16 billion in wages.
- Business income for the firms was \$1.5 billion

The study identified 300 firms involved in maritime support services.

- The companies employed 4,600 people and generated \$390 million in wages.
- Business income for the maritime support services sector was \$864 million.



Elliott Bay and Lake Washington are key for the Maritime cluster. Industrial Moorage must be maintained for the health of the regional economy.

