



Market Channels and Value Added to Fish Landed at Monterey Bay Area Ports

Caroline Pomeroy, Sea Grant Extension and Michael Dalton, NOAA Fisheries



Project

The main objective of this project was to estimate the value added to fish landed in Moss Landing, Monterey and Santa Cruz harbors in 2003, as the fish moved from fishermen to processors, packagers, distributors and seafood retailers. Another primary goal was to document the “spatial distribution” of fishing activity in the region—where marine species were landed, processed, packaged and sold, at what prices and to whom during the six-year period from 1998 to 2003.

These calculations were based on commercial fishing data, fish processors' expenditures and revenues, and local retail seafood prices. Processors were also interviewed about the history of their businesses, locations of facilities, numbers of employees, top customers, and sources of goods and services. Harbormasters were another source of information on commercial fishing and processing activities at their respective harbors.

The cumulative results of these quantitative and qualitative investigations provide some insights into the economic value and diversity of fishing operations in Monterey Bay. This information will help policymakers assess the consequences of resource management.

Results

Moss Landing was the center of fishing activity in the region during the study period. The average annual ex-vessel* value of fish landed at Moss Landing was almost \$6 million, in real 2000 dollars, compared with about \$2 million for Monterey and less than \$1 million for Santa Cruz. Moss Landing also had more fish buyers. During the study period, there were approximately 61 active fish buyers each year, compared with 39 in Santa Cruz and 27 in Monterey.

*(Ex-vessel value is the amount paid to fishers for their raw catch. Similarly, ex-processor and ex-vendor values are the amounts paid to processors and vendors for their processed and retail products, respectively.)

Value Added—Ex-vessel, ex-processor and ex-vendor revenues for 2003 were estimated by multiplying the total number of pounds of fish sold by fishermen, buyers and vendors that year by their respective estimated prices per pound. The value added from processing was calculated by subtracting ex-vessel revenues from ex-processor revenues. Similarly, the value added by vendors was calculated by subtracting ex-processor revenues from ex-vendor revenues.

Using the calculations mentioned above, the estimated ex-vessel value of all commercial fisheries in the region in 2003 was \$10 million. The value added by processing was about \$36 million, and the value added by vendors about \$24 million, for a total additional \$60 million, according to the scientists' calculations.

Squid was the region's most valuable fishery in 2003, capturing about 84% of the total ex-vendor value of all commercial fisheries in the region and 70% of the total ex-vessel value. The ex-vessel value of squid was about \$7 million in 2003, almost 10 times that of any other commercial fishery. The squid was processed and sold to vendors for about \$30 million, for an added value of about \$23 million. Vendors sold the resulting products to consumers for about \$49 million, more than four times the ex-vendor value of all other fisheries combined that year. The value added by vendors was thus \$19 million.

Other commercially important species in 2003 included: albacore, worth \$296,000 ex-vessel, \$2.25 million ex-vendor; salmon, worth \$776,000 ex-vessel, \$2.38 million ex-vendor; and sablefish, worth \$711,000 ex-vessel, and \$2.40 million ex-vendor. *(continued)*

California Sea Grant College Program

Russell A. Moll, Director • Paul Olin, Extension Director • Marsha Gear, Communications Director
University of California, San Diego, 9500 Gilman Drive, Dept. 0232, La Jolla, CA 92093-0232
Communications Phone: (858) 534-4446 • Fax: (858) 453-2948 • Web: <http://www.csgc.ucsd.edu>

Geographical Distribution—A couple interesting facts emerged from the data analysis. Much of the catch landed in Monterey Bay is processed outside of Monterey and Santa Cruz counties; and of the fish processed in Monterey and Santa Cruz counties, much is sold to vendors in other counties, particularly to businesses around San Francisco Bay and further north.

Implications

“Locally we have a diversity of fisheries, and a lot of value is being added to these in a variety of ways to serve local consumers and distant markets,” said Carrie Pomeroy, now a California Sea Grant Marine Advisor. “Considerable value is generated locally and then spreads out as people sell seafood products and spend money earned from these sales on goods and services locally and beyond the region.

“There is increasing fishing activity in Moss Landing, relative to the other harbors, but each harbor has its own niche,” she said.

“Together these make Monterey Bay a dynamic area for fisheries.... This information is critical to evaluating impacts on communities and the region, as well as the state.”

Note: The scientists’ complete technical narrative is publicly available for free at eScholarship Repositories:
http://repositories.cdlib.org/csgc/rcr/MA05_01

Collaborators

Pacific States Marine Fisheries Commission; local harbormasters, seafood buyers and vendors who generously participated in interviews

For More Information

Caroline Pomeroy, Marine Advisor
 California Sea Grant Extension Program
 Watsonville, California
 Tel: 831.763.8002 • Email: cmpomeroy@ucdavis.edu

Michael Dalton
 NOAA Alaska Fisheries Science Center
 Tel: 206.526.6551 • Email: michael.dalton@noaa.gov



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