EXECUTIVE SUMMARY

Port by Port: Profiles and Analysis of the Massachusetts Commercial Fishery provides an overview of commercial fishing in Massachusetts and, for the first time, describes conditions in each municipality with a commercial homeport. The report highlights both the important role that commercial fishing plays in the state's economy, as well as the access and infrastructure challenges that limit the industry's current operations as well as its growth.

Commercial Fishing is an Increasingly Important Part of the State's Economy

Data analyzed for this report show that, though the significance of certain species has changed over time, the value of seafood brought in to (or "landed" in) Massachusetts ports between 2009 and 2018 has risen nearly 38 percent, when adjusted for inflation[1]. [2]

In 2018, total landings (in whole pounds) amounted to 734 million pounds, valued at $647 million at the first point of sale (*i.e.,* the "ex-vessel" value).

More than half (approximately 55%) of that value was from the harvest and sale of a single species—the sea scallop. The American lobster, eastern oyster, surf clam, and Jonah crab rounded-out the top five most valuable species for 2018, though several species each brought in more than $3 million in ex-vessel value, showing a varied commercial fishing industry in Massachusetts.

Landings of groundfish species declined by approximately 20 percent from 2009 to 2018. Much of this can be attributed to landings of cod, which dropped 90 percent during that time period. Haddock, however, showed a slight increase in landings, and redfish landings were up 300 percent.

Top Species, by Ex-Vessel Value, Landed in Massachusetts in 2018

SPECIES	2018 EX-VESSEL VALUE
SEA SCALLOP	$373,826,248
AMERICAN LOBSTER	$88,799,297
EASTERN OYSTER	$28,388,055
ATLANTIC SURF CLAM	$17,247,917
JONAH CRAB	$12,475,573
HADDOCK	$12,304,940
OCEAN QUAHOG	*
MONKFISH	$8,452,835
SOFT SHELL CLAM	$6,200,167
WINTER FLOUNDER	$5,082,703
ATLANTIC SEA HERRING	$5,058,901
BLUEFIN TUNA	$4,967,832
ACADIAN REDFISH	$4,905,766
NORTHERN QUAHOG	$4,885,144
CHANNELED WHELK	$4,652,272
SILVER HAKE (WHITING)	$4,379,900
ATLANTIC COD	$4,172,340
AMERICAN PLAICE (DAB)	$4,108,288
POLLOCK	$4,055,134
STRIPED BASS	$3,849,610

SOURCE: ACCSP Data Warehouse, 2020 ED

* Confidential

Eastern oysters also increased dramatically, nearly quadrupling from $6.4 million in ex-vessel value in 2009 to $28.3 million in 2018. This increase can be attributed to the proliferation of aquaculture operations primarily on Cape Cod, and rising consumer demand.

[1] NOAA. 2017. Fisheries Economics of the United States. https://www.fisheries.noaa.gov/national/sustainable-fisheries/fisheries-economics-united-states

[2] Numbers elsewhere in this report are not adjusted for inflation.

Lobsters landings from the Gulf of Maine increased as well, rising from 8.4 million pounds in 2009 to 13.1 million pounds in 2018. This increase has been seen primarily in ports north of Cape Cod where environmental conditions are optimal for growth. South of Cape Cod, warming waters are negatively impacting lobster abundance[3].

Commercial Fishing is an Important Part of Municipal Economies and Cultures

The top five ports in Massachusetts in terms of overall ex-vessel value are New Bedford, Gloucester, Chatham, Barnstable, and Boston. Moreover, New Bedford is the top-ranked port in the United States in terms of ex-vessel value due to its role in the sea scallop fishery. [4] Gloucester and New Bedford are the top-ranked lobster landing ports in the state and Gloucester also continues to be the top groundfish[5] port in Massachusetts. Barnstable's landings are driven by shellfish, primarily oyster, while Boston's landings are driven by groundfish. Chatham's landings are a mixture of groundfish, shellfish, lobster, and other finfish.

Within the top three species landed in MA, other important ports that landed in excess of $4 million for the species include Rockport, Sandwich, Plymouth, and Provincetown for lobster, Duxbury and Wellfleet for oysters, and Fairhaven and Chatham for sea scallops. Please refer to Appendix B for more details on top ports and top ports by species in terms of ex-vessel value.

Top Commercial Fishing Ports, by Ex-Vessel Value, in 2018

PORT	2018 EX-VESSEL VALUE
NEW BEDFORD	$431,038,042
GLOUCESTER	$53,210,608
CHATHAM	$18,967,799
BARNSTABLE	$16,982,115
BOSTON†	$16,416,184
FAIRHAVEN	$8,413,362
WELLFLEET	$7,728,102
PROVINCETOWN	$7,721,452
DUXBURY†	$6,789,874
SANDWICH	$6,769,995

SOURCE: SAFIS Dealer Database & ACCSP Data Warehouse, 2020 TH

† Exact total value cannot be displayed due to data limitations; see individual port profile in Appendix A for more information. The displayed value is > 80% of the total value for the port.

Though the ex-vessel values seen in other ports may not rise to the levels of New Bedford or Gloucester, commercial fishing plays an important role in the economies and cultures of smaller ports and the region as a whole. In fact, commercial fishing provides part-time and full-time employment for thousands of residents, though Massachusetts commercial permit data indicate that the median age of fishermen is increasing, which suggests that fewer young people are pursuing a career in commercial fishing.

Efforts are Needed to Address Access and Infrastructure Challenges

Surveys of harbormasters and commercial fishermen indicate that, despite the industry's successes, many access and infrastructure challenges limit growth—and in some cases, impair operations.[6] Among the most frequently cited issues were shallow water and the need for dredging, a lack of affordable berthing for commercial users, the need for more space to load and unload catches and gear, and a lack

[3] Atlantic States Marine Fisheries Commission. 2021. American Lobster Management. http://www.asmfc.org/species/american-lobster

[4] NOAA. 2017. Fisheries Economics of the United States. https://www.fisheries.noaa.gov/national/sustainable-fisheries/fisheries-economics-united-states

[5] Defined in 322 CMR 6.03(1) as American plaice, cod, haddock, halibut, monkfish, ocean pout, pollock, redfish, windowpane flounder, winter flounder, witch flounder, wolfish and yellowtail flounder.

[6] This study did not take into consideration fisheries regulations, but rather focused on challenges related to physical access to/from the water and coastal infrastructure.

of parking. Specific needs varied by municipality and are documented in the Port Profiles in Appendix A of the report.

The report includes a series of recommendations to address the needs and opportunities identified by harbormasters and the commercial fishing community. Implementing many of this report's recommendations to improve access and infrastructure will require funding, *e.g.,* for dredging, installing new docks and moorings, conducting planning exercises to increase parking. The port profiles in Appendix A can be used by commercial fishers, harbormasters, waterways committees, select boards, and others to help illustrate the importance of local commercial fishing activities and to advocate for additional funding.

I. INTRODUCTION

Massachusetts is known worldwide for its commercial fisheries, a significant part of the region's history and culture that help drive the state's economy. In 2018, for example, the total value of fish purchased from vessels in Massachusetts ports was $647 million.

Activities related to commercial fishing, including seafood processing, seafood markets, fish hatcheries, and aquaculture, contributed $687.9 million to the Massachusetts Gross State Product in 2015, employing more than 5,700 people and generating $321.1 million in total wages.[7]

Increased demand for local seafood during the COVID-19 pandemic underscores the important and growing role the Massachusetts commercial fishing industry plays in supplying sustainable protein to local residents.

Despite the industry's significance, Massachusetts fishermen report that they are being displaced from harbors and struggle to obtain access to essential or important port infrastructure such as dockage, ice, parking, and hoists.

As communities work to balance competing uses for their waterfronts, information about existing conditions (for example the size of local fleets), challenges (such as dredging and parking), and

[7] Public Policy Center, UMass Dartmouth. 2018. Navigating the Global Economy: A comprehensive analysis of the Massachusetts Maritime Economy.