



PORT SAN LUIS COMMERCIAL FISHING INDUSTRY
ECONOMIC IMPACT REPORT
FEBRUARY 2018



PORT SAN LUIS

COMMERCIAL FISHING INDUSTRY

2017 HARBOR DISTRICT ECONOMIC IMPACT REPORT

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ACKNOWLEDGEMENTS

The 2017 Port San Luis Commercial Fisheries Economic Impact Report was made possible by the Port San Luis Commercial Fisherman's Association (PSLCFA) and Port San Luis Harbor District with support and funding from the Morro Bay Commercial Fisherman's Organization and the Central Coast Joint Cable/Fisheries Liaison Committee (CCJFLC). We would like to thank each of those organizations and express our gratitude for the opportunity to work with groups of individuals who are committed to a common goal.

While the report drew heavily from state and federal data sources, it was the generous assistance and guidance of commercial fishermen, fishing families, Harbor District staff, and related businesses owners and operators who ultimately made this report a reality.

On behalf of all who read and benefit from this report, a special thanks for outstanding generosity and patience to: Captains Tom Capen, Bill Ward, and Bill Barrow. We would also like to thank the Harbor Manager, Andrea Lueker and owners/operators of the Port San Luis Boatyard. LWC has been working with many of these individuals for over ten years, starting with a Commercial Fisheries Business Plan in 2006/2007 and we respect and value their patience, knowledge and generosity.



We would also like to thank Chris Kubiak of the Central Coast Joint Cable Fisheries Liaison Committee for managing the logistics of the grant and offering continuing guidance on the history of commercial fishing in San Luis Obispo County, as well as the California Department of Fish and Wildlife (CDFW), and Pacific Fisheries Information Network (PacFin).



PORT SAN LUIS
HARBOR DISTRICT



INTRODUCTION

Port San Luis is located in Avila Beach, an unincorporated area of San Luis Obispo County. The County created the Port San Luis Harbor District in 1954 primarily to repair and maintain the piers and support commerce associated with oil and gas extraction, movement of passengers and cargo, and commercial fishing.

There are three piers in Port San Luis Harbor District: Avila Pier, Cal Poly Pier, and Harford Pier. Harford Pier which dates back to the 1870s is open to the public and the hub of commercial and recreational fishing activity in the Harbor District. The 3,000 foot Cal Poly Pier was built in 1984 and is limited to academic researchers. The Avila Pier was first constructed in 1908, and extends 1,685 feet. It is currently closed for repairs.

In early 2017, the Port San Luis Commercial Fisherman’s Association (PSLCFA) and Port San Luis Harbor District teamed with the Morro Bay Commercial Fisherman’s Organization and the Central Coast Joint Cable/Fisheries Liaison Committee (CCJFCLC) to fund and initiate the 2017 Port San Luis Commercial Fishery Economic Impact Report.

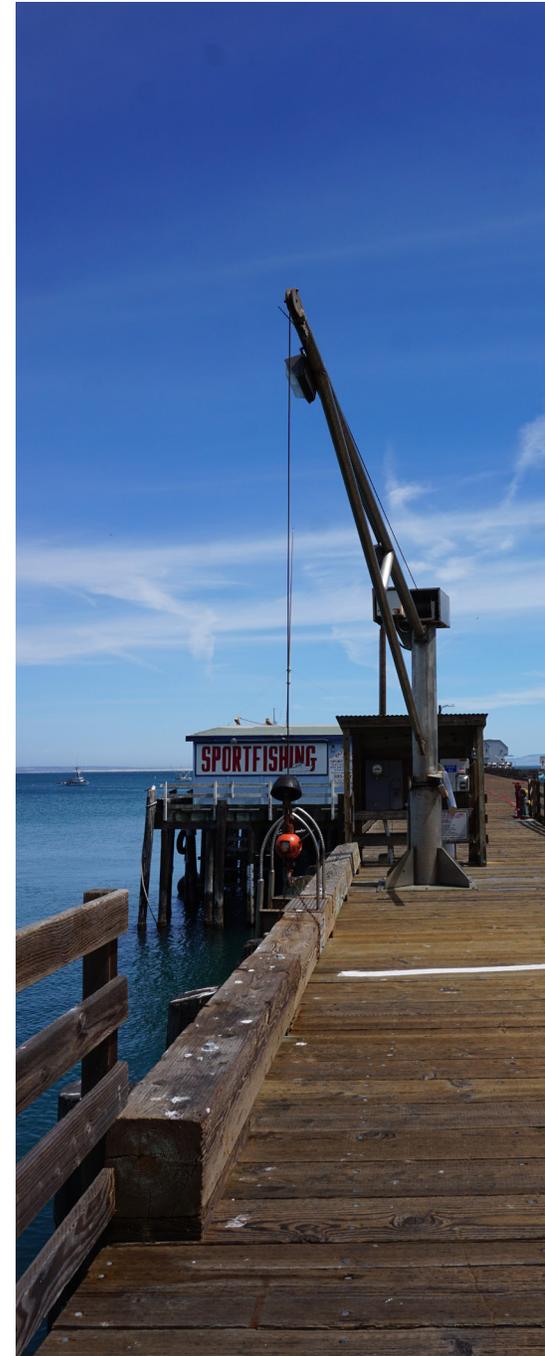
The goal of the report is to identify and illustrate the economic contributions of the commercial fishing industry between 1990 and 2016 with a focus on the baseline established in a similar report completed in 2013.

This report further serves to inform local citizens, civic leaders, and elected officials of the commercial fishing industry’s contributions to the local economy through direct earnings, generation of employment, synergies with tourism, and the provision of sustainably caught, healthy seafood. The report is also intended to assist local fishermen and industry stakeholders to promote, support, and defend the industry by providing access to key statistics.

Methods and Data Sources: The report relies heavily on direct input from the community including more than 14 hours of personal interviews with commercial fishermen, related industry stakeholders, District staff, Harbor Commissioners, and various marine dependent users. The Port San Luis commercial fishing community’s hard work and ability to adapt to changes in regulation, markets, and ocean conditions make it a consistent economic performer in California and a driving force of the local economy. Data for the 2017 Economic Impact Report draws from the California Department of Fish and Wildlife (CDFW), Pacific Fisheries Information Network (PacFIN), Pacific States Marine Fisheries Commission (PSMFC) as well as the National Ocean Economic Program (NOEP) and other academic, agency, and industry sources.

This report addresses performance of the commercial fishing industry during calendar years 2013, 2014, 2015, and 2016.

- Commercial fishing activity in Port San Luis dates back to the late 1800s and by the 1930s landings averaged 2.7 million pounds per year, made up of sardines, mackerel, rockfish, crab and albacore. By the mid-1940s salmon start to show up on fish tickets (Scofield 1954).



EW, or ex-vessel value, is the price paid to the fishermen at the dock and represents the fishermen's gross income.



EARNINGS GROWTH

Ex-Vessel Value (EVV), or the amount that fishermen earn at the dock, has risen every year for the last four years in Port San Luis. EVV was greater than \$2 million each year between 2013 and 2016. In 2016, commercial fishermen generated more than \$2.7 million, the highest since 1998.

"I truly believe that the fishing industry is coming back." Fisherman, personal communication, 2017



LANDINGS GROWTH

Commercial fishermen in Port San Luis landed more than 450,000 pounds of seafood per year over the past four years. Landings in 2016 reached approximately 977,000 pounds, the highest level since 2004. Landings rose nearly 106% between 2013 and 2016, from 475,000 pounds in 2013 to nearly 977,000 pounds in 2016.



NEW MARKETS

In 2015, commercial fishermen landed Pacific hagfish in Port San Luis for the first time since 2009. By 2016, Port San Luis was the top performing Pacific hagfish port in California. In 2016, Wilcox Fisheries converted the old ice house on Harford Pier into a hagfish offloading and processing facility. The hagfish fishery now directly employs approximately ten people, and is the second highest earning fishery in Port San Luis behind Dungeness crab.



BOATYARD AND HAULOUT FACILITY

The Port San Luis Boatyard came under new ownership in early 2014. The boatyard now employs five people including two owners, and is notably one of the last self-service boatyards in the state, drawing vessel owners from as far as San Diego. The boatyard also sells marine supplies and outboard motors, and launched more than 4,000 boats in 2016.

EMPLOYMENT

Commercial fishing and related activities employ at least 40 people from skippers to deckhands, dockworkers, seafood buyers, processors, distributors and related industry services, and represent a draw for tourism, which supports hundreds of jobs and millions of dollars in GDP for the local economy.

CHALLENGES: *While landings, earnings and price per pound in Port San Luis have grown over the past ten years, the community noted continued challenges led by regulations that limit access to fishing grounds, high cost of attaining permits, the ongoing need for infrastructure repairs and upgrades at the port, and the lack of new participants. Commercial fishermen also note the lack of a bait supplier as a significant challenge.*

ECONOMIC PERFORMANCE

This section addresses the economic activity generated by the commercial fishing fleet in Port San Luis from 1990 to 2016 with a more detailed focus on 2013 through 2016. Key metrics include ex-vessel value (EVV) or the amount that fishermen earn at the dock, landings by weight, and price per pound. Attention is also given to performance by key species as well as data on Fish Tickets, Vessel IDs and Trips which are a proxy for commercial activity and vibrancy. It is important to note, that all of these metrics are on the rise in port San Luis.

OVERALL EARNINGS

Earnings at the dock in Port San Luis have increased approximately 31% in the last four years, from \$2.07 million in 2013 to \$2.72 million in 2016. Commercial fishermen in Port San Luis have generated more than \$62 million in earnings since 1990. Between 2013 and 2016, commercial fishermen earned \$9.3 million in EVV.

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“Things are great. I’ve had record years the last few years. If the catch isn’t a record, the price is a record. The money is getting better every year.” –Fisherman, personal communication, 2017



Port San Luis, All Species, EVV, 2013 – 2016

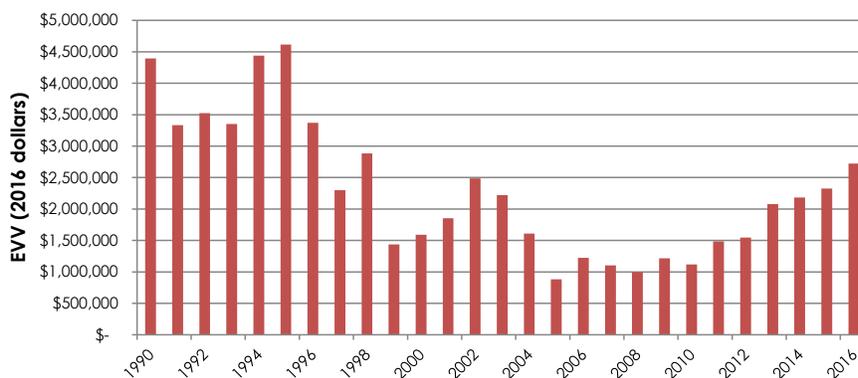
EVV (2016 dollars)

2013	\$2,077,854
2014	\$2,181,109
2015	\$2,325,476
2016	\$2,720,793

Source: CDFW



Port San Luis, All Species, EVV, 1990 - 2016



Source: CDFW



OVERALL LANDINGS

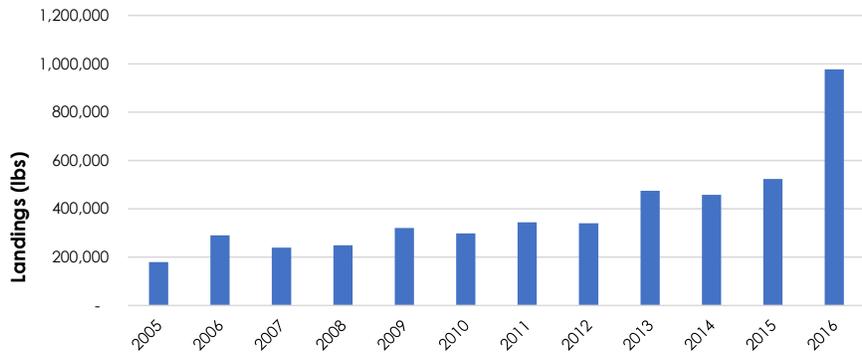
Landings by weight in Port San Luis have increased from 475,000 pounds in 2013 to nearly 977,000 pounds in 2016, approximately 106%. Commercial fishermen landed a total of 2.4 million pounds of seafood between 2013 and 2016. Since 1990, commercial fishermen have landed more than 47 million pounds of seafood in Port San Luis. Landings have risen nearly 450% from their 20-year low in 2005, from 179,200 pounds in 2005 to 976,800 pounds in 2016.

Port San Luis, All Species, Landings, 2013 - 2016

	<i>Landings (lbs)</i>
2013	474,948
2014	458,039
2015	523,267
2016	976,871

Source: CDFW

Port San Luis, All Species, Landings, 1990 - 2016



Source: CDFW





PRICE PER POUND

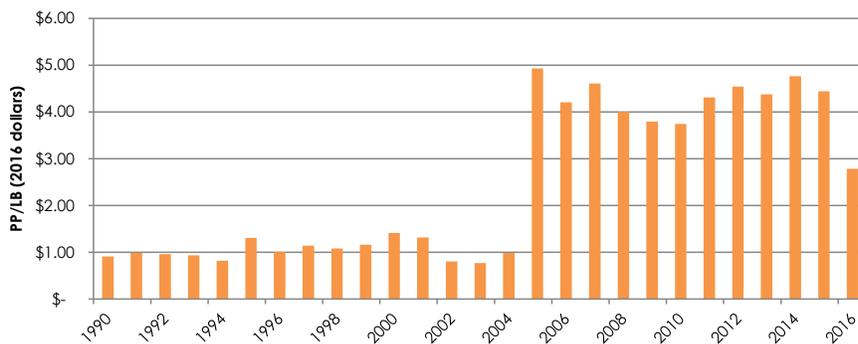
In Port San Luis, price per pound for all commercial landings has been on a strong and steady rise since the early 2000s. The average price per pound in 2016 was \$2.79, down from \$4.44 in 2015, but more than double the average price per pound seen in 1990s and early 2000s. The decline is attributed to the increased landings of high-volume, low-value species like Pacific hagfish, and lower price per pound of Dungeness crab.

Port San Luis, All Species, Price Per Pound, 2013 – 2016

<i>Price Per Pound</i>	
2013	\$4.37
2014	\$4.76
2015	\$4.44
2016	\$2.79

Source: CDFW

Port San Luis, All Species, Price Per Pound, 1990 – 2016



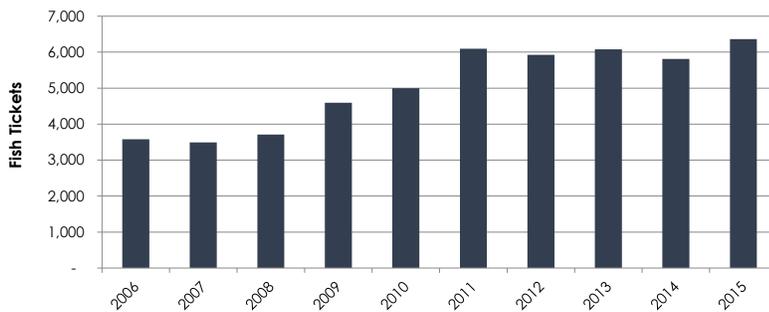
Source: CDFW



FISH TICKETS, TRIPS, AND VESSEL IDS

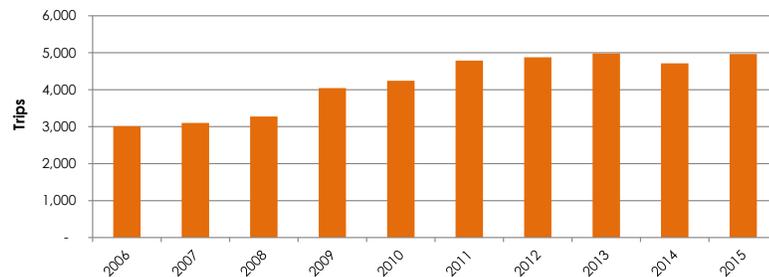
Fish tickets, vessel IDs, and trips, a proxy for commercial fishing activity and transactions, are on a steady rise in San Luis Obispo County. Trips increased from 3,010 in 2006 to 4,966 in 2015, a 65% increase. The number of fish tickets, which are required with any sales transaction at the dock, have climbed from 3,578 in 2006 to 6,364 in 2015, a 78% increase. Vessel IDs, or the number of vessels operating out of Port San Luis and Morro Bay, has risen 27% since 2006, from 175 to 223. These figures point to greater fishing activity, higher confidence, more money changing hands and more locally and sustainably caught fish for seafood consumers. Note: this data is only available on the County level.

Number of Fish Tickets, San Luis Obispo County, 2006 - 2015



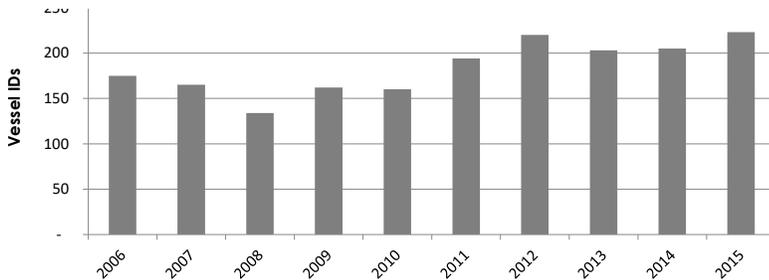
Source: PacFIN

Number of Trips, San Luis Obispo County, 2006 - 2015



Source: PacFIN

Number of Vessel Identifiers, San Luis Obispo County, 2006 - 2015



Source: PacFIN

IMPORTANT FISHERIES

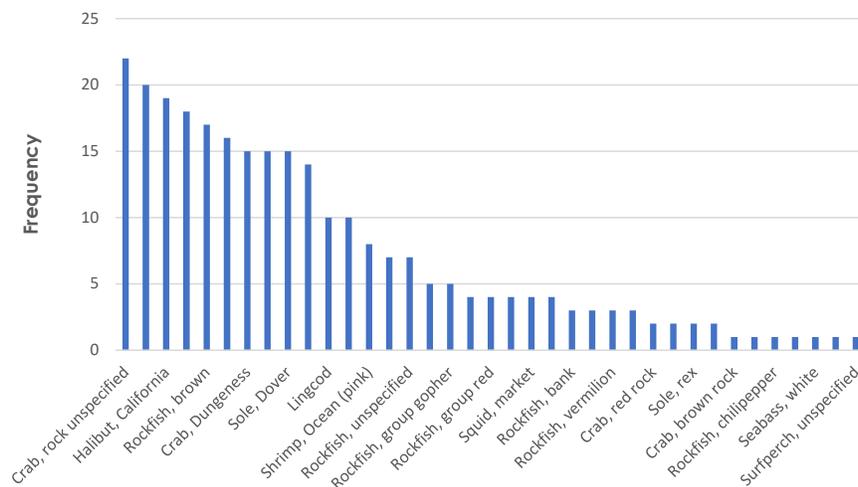
Port San Luis was dominated through its history by the groundfish trawl fishery. Since the late 1990s and the near elimination of trawling from the Central Coast due to radical shifts in regulation from area closures, gear restrictions, and seasonal closures, as well as competition from inexpensive foreign imports, the commercial fleet has shown amazing adaptability and toughness. Commercial fishermen in Port San Luis have adapted by targeting a wider diversity species and working hard to develop associated markets. In 2011, Port San Luis was the top earning port for gopher rockfish and brown rockfish. In 2016, commercial fishermen in Port San Luis landed more than \$400,000 in Pacific hagfish, for which there were virtually no landings since the 1990s. Over the last 27 years, commercial fishermen in Port San Luis have also increased landings and earnings for Dungeness crab, black-and-yellow rockfish and cabezon and generated a rebound in salmon.



SPECIES DIVERSITY

Species diversity, defined by the number and distribution of species contributing to Port San Luis’s overall earnings, remains strong. Since 1990, 37 species have appeared in the top ten species by EVV in Port San Luis. The greater number of species that appear in this list and their significance points to less reliance on any one fishery and market and points to a greater stability and ability to adapt to shifts in the market.

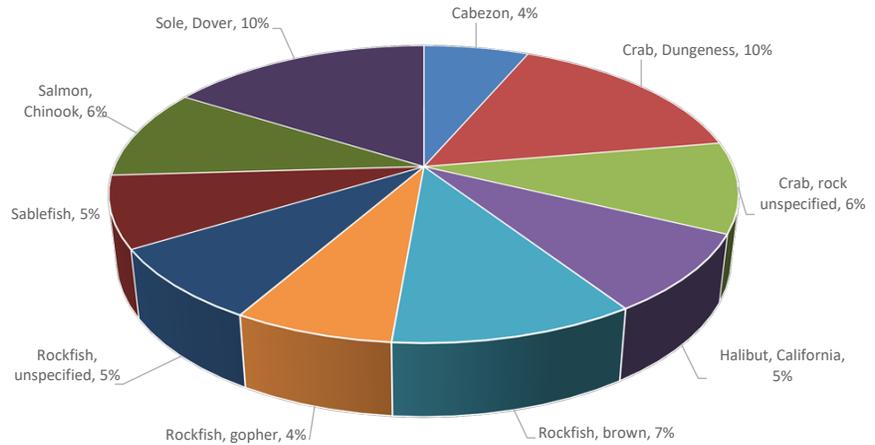
Frequency of Ranking in Top Ten by EVV, 1990 – 2016



Source: CDFW

The top ten earning species overall since 1990 have been Dover sole, Dungeness crab, brown rockfish, rock crab, Chinook salmon, California halibut, unspecified rockfish, sablefish, gopher rockfish, and cabezon.

Top Species Overall by EVV, 1990 – 2016

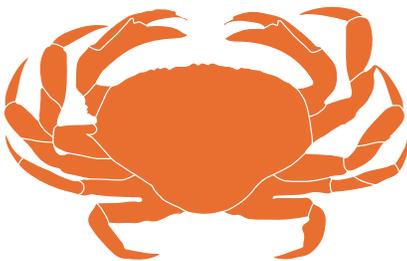


Source: CDFW

TOP SPECIES

Port San Luis is consistently one of the top earning ports in California for gopher rockfish, brown rockfish and black-and-yellow rockfish, and cabezon.

In Port San Luis, the top five earning species by EVV between 2013 and 2016 were Dungeness crab at 41% of total earnings, brown rockfish at 12%, gopher rockfish at 10%, Pacific hagfish at 5%, and Chinook salmon at 5%.



Dungeness Crab

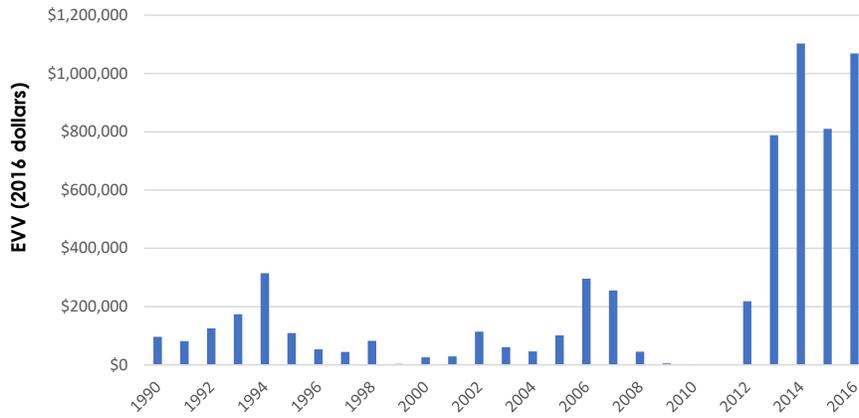
Dungeness crab was the highest earning species in the port for each year between 2013 and 2016. Overall, fishermen landed 923,132 pounds of Dungeness crab over the four year period, worth more than \$3.7 million in EVV. Since 1990, commercial fishermen have driven more than \$6 million in earnings at the dock from Dungeness crab.

Port San Luis, Dungeness Crab, Landings and EVV, 2013 – 2016

	Landings (lbs)	EVV (2016 dollars)
2013	220,864	\$788,745
2014	248,318	\$1,102,815
2015	133,408	\$809,870
2016	320,542	\$1,068,791

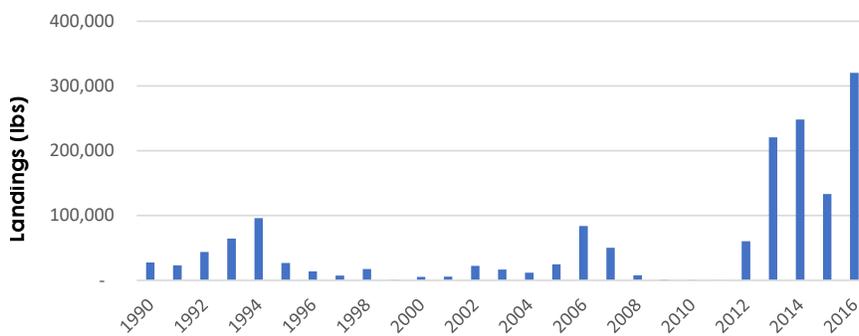
Source: CDFW

Port San Luis, Dungeness Crab, EVV, 1990 – 2016



Source: CDFW

Port San Luis, Dungeness Crab, Landings, 1990 – 2016



Source: CDFW



Brown Rockfish

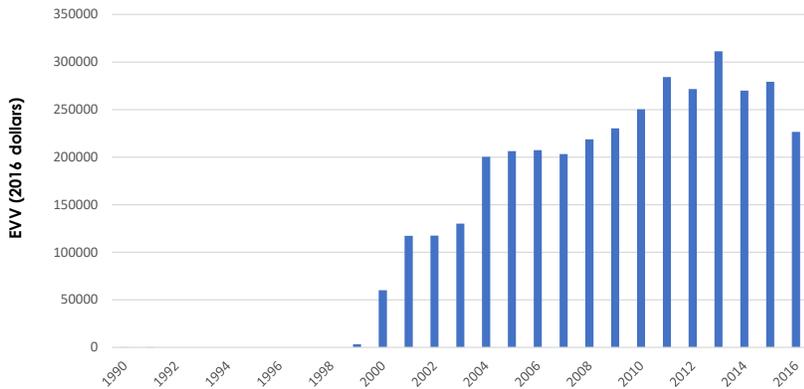
Commercial fishermen in Port San Luis landed 38,283 pounds of brown rockfish with an EVV of more than \$1 million. Since 1990, fishermen have landed 596,413 pounds worth \$3.6 million in EVV. In 2011, Port San Luis was the top earning port in the State of California for Brown rockfish.

Port San Luis, Brown Rockfish, Landings and EVV, 2013 – 2016

	<i>Landings (lbs)</i>	<i>EVV (2016 dollars)</i>
2013	43,848	\$311,229
2014	38,932	\$269,923
2015	39,177	\$279,196
2016	31,176	\$226,680

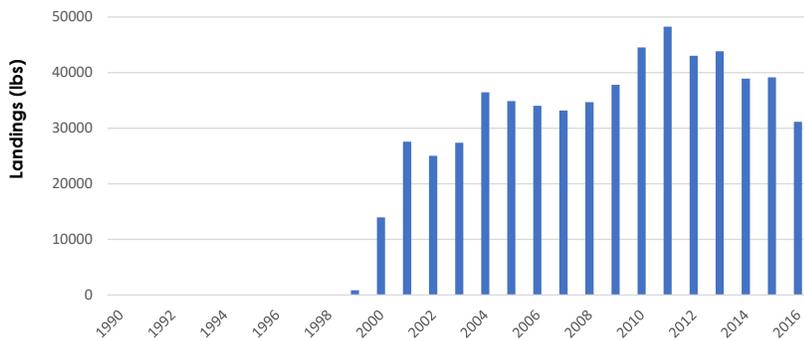
Source: CDFW

Port San Luis, Brown Rockfish, EVV, 1990 – 2016



Source: CDFW

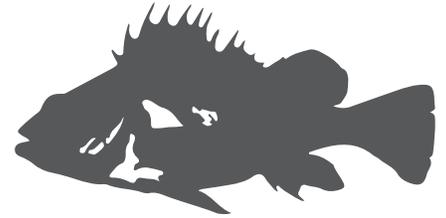
Port San Luis, Brown Rockfish, Landings, 1990 – 2016



Source: CDFW

Gopher Rockfish

Commercial fishermen landed 107,291 pounds of gopher rockfish between 2013 and 2016, with an EVV of nearly \$900,000. Since 1990, commercial fishermen have landed 341,532 pounds of gopher rockfish, generating more than \$2.6 million in EVV. Earnings from gopher rockfish landings have been more than \$200,000 per year since 2011. While there were some landings in the 1990s, most of the commercial activity surrounding gopher rockfish in Port San Luis occurred after 2000. Port San Luis was the top earning port in California for Gopher rockfish in 2011.

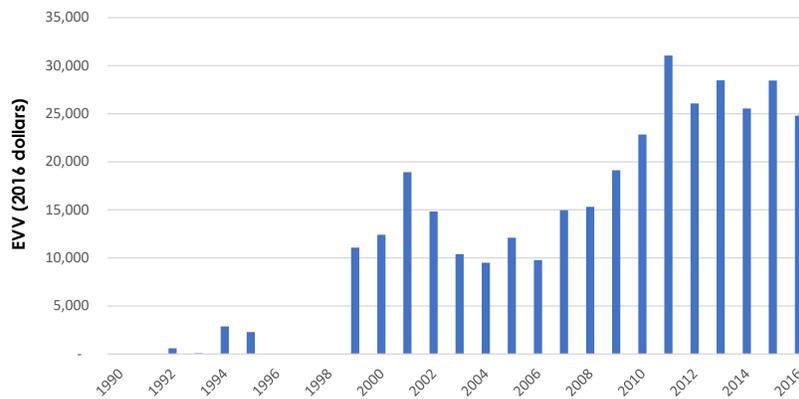


Port San Luis, Gopher Rockfish, Landings and EVV, 2013 – 2016

	Landings (lbs)	EVV (2016 dollars)
2013	28,470	\$242,178
2014	25,556	\$208,850
2015	28,462	\$237,315
2016	24,803	\$208,218

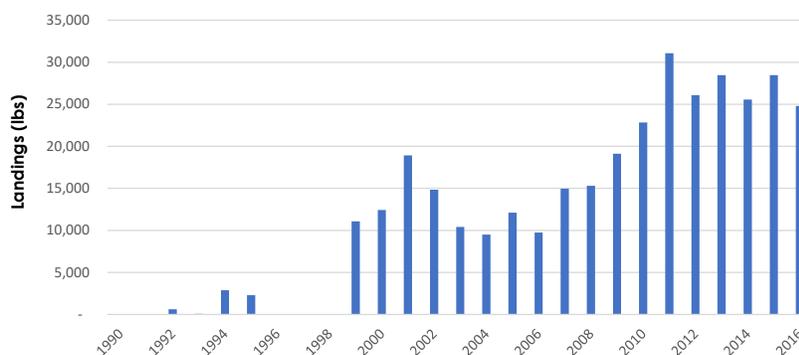
Source: CDFW

Port San Luis, Gopher Rockfish, EVV, 1990 – 2016



Source: CDFW

Port San Luis, Gopher Rockfish, Landings, 1990 – 2016



Source: CDFW

Pacific hagfish, also known as slime eels, are an open-season, live fish fishery. As an open-access fishery that employs relatively simple gear, there are lower barriers to entry for new participants.

Pacific Hagfish

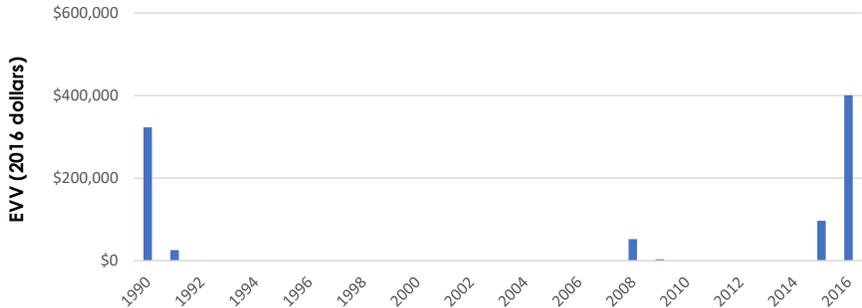
Port San Luis was the top port for Pacific hagfish in California in 2016, landing 388,000 pounds worth more than \$400,000. While there were occasional and limited landings throughout the last 27 years, 2015 and 2016 saw commercial fishermen in Port San Luis generate almost \$500,000 at the dock from Pacific hagfish. Local commercial fishermen have invested in new infrastructure and developed new markets to support this opportunity.

Port San Luis, Pacific Hagfish, Landings and Earnings 2013 - 2016

	Landings (lbs)	EVV (2016 dollars)
2013	-	-
2014	-	-
2015	82,600	\$96,442
2016	388,993	\$400,467

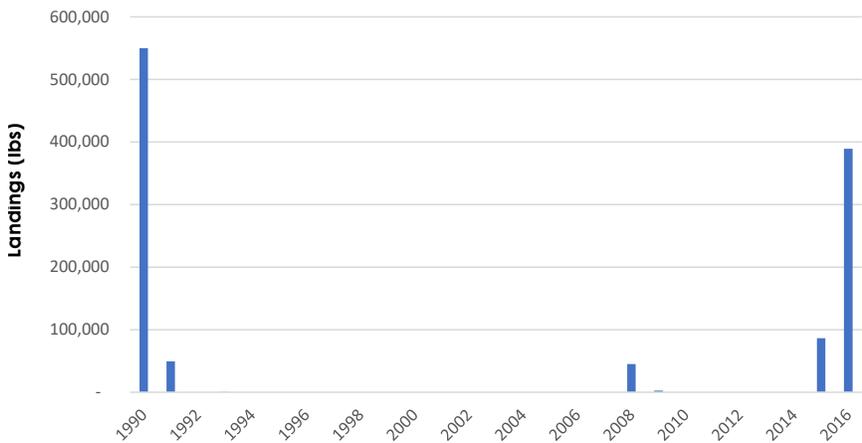
Source: CDFW

Port San Luis, Pacific Hagfish, EVV, 1990 - 2016



Source: CDFW

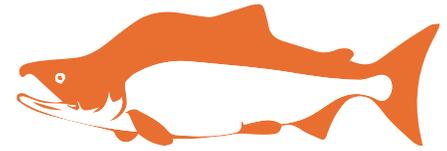
Port San Luis, Pacific Hagfish, Landings, 1990 - 2016



Source: CDFW

Chinook Salmon

Chinook salmon was one of the top landed species in Port San Luis 16 times between 1990 and 2017. During that time, commercial fishermen in Port San Luis landed 984,366 pounds, worth \$3.75 million in EVV. Between 2013 and 2016, Port San Luis commercial fishermen earned nearly \$491,000 at the dock from salmon.

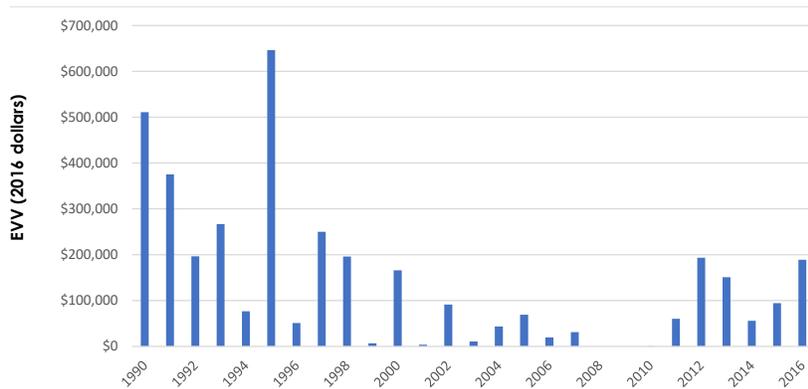


Port San Luis, Chinook Salmon, Landings and EVV, 2013 – 2016

	<i>Landings (lbs)</i>	<i>EVV (2016 dollars)</i>
2013	22,962	\$151,122
2014	8,472	\$56,169
2015	12,063	\$94,385
2016	19,954	\$189,254

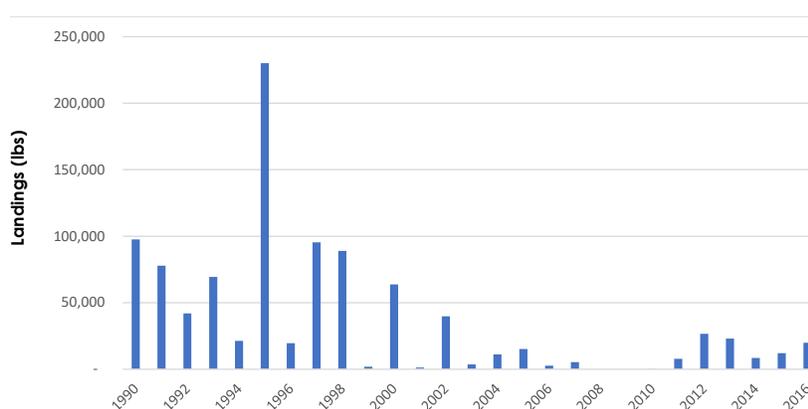
Source: CDFW

Port San Luis, Chinook Salmon, EVV, 1990 – 2016



Source: CDFW

Port San Luis, Chinook Salmon, Landings, 1990 – 2016



Source: CDFW

OTHER IMPORTANT SPECIES

In addition to the top landed species, rock crab, California halibut, and the live fish fishery have played important historical roles for the Port San Luis commercial fleet, supporting commercial fishermen, and fishing families, generating employment and fees that supported the maintenance of critical physical infrastructure and facilities.

Rock Crab

Rock crab has been one of the top landed species by EVV in 22 out of the last 27 years in Port San Luis, outperforming all species. Since 1990, commercial fishermen in Port San Luis have landed 2.2 million pounds worth nearly \$3.8 million in EVV. Between 2013 and 2016, fishermen landed 136,140 pounds of rock crab, with an EVV of \$232,186.

Port San Luis, Rock Crab Landings and EVV, 2013 - 2016

	<i>Landings (lbs)</i>	<i>EVV (2016 dollars)</i>
2013	50,257	\$83,918
2014	7,059	\$11,951
2015	64,485	\$109,301
2016	14,339	\$27,016

Source: CDFW

Live Fish Fishery

The low volume, high value live fish fishery has played a significant economic role in Port San Luis, bringing in more than \$12 million in EVV since 1990. Most of the live fish landed in Port San Luis is shipped to markets in Los Angeles and Oakland. Three of the five top landed species in Port San Luis between 2013 and 2016 are live fish: brown rockfish, gopher rockfish, and hagfish. In addition to these species, cabezon, grass rockfish, and black-and-yellow rockfish are also sold live. Between 2013 and 2016, fishermen landed a total of 218,853 pounds of live fish, worth \$3.4 million in EVV. Altogether, the live fish fishery represents 6% of all landings and 19% of EVV at the port since 1990.



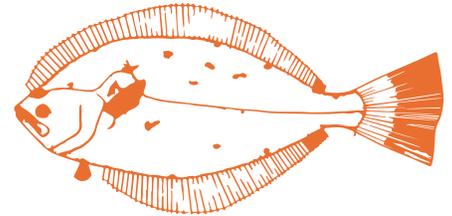
Port San Luis, Live Fish Landings and EVV, 2013 – 2016

	<i>Landings (lbs)</i>	<i>EVV (2016 dollars)</i>
2013	109,441	\$821,433
2014	99,894	\$718,725
2015	192,185	\$884,189
2016	473,890	\$1,030,762

Source: CDFW

California Halibut

Since 1990, commercial fishermen have landed nearly 800,000 pounds of California halibut, generating more than \$3.2 million in EVV. Between 2013 and 2016, fishermen landed 23,119 pounds worth more than \$150,000 in EVV. The average price per pound for halibut was above \$6 per pound per year since 2012, making it one of the highest earning species landed in the port.



Port San Luis, California Halibut Landings and EVV, 2013 - 2016

	<i>Landings (lbs)</i>	<i>EVV (2016 dollars)</i>
2013	1,740	\$10,519
2014	2,062	\$13,224
2015	11,265	\$73,943
2016	8,052	\$53,315

Source: CDFW

- The California halibut fishery is
- accessible to fishing operations that
- use small, trailerable boats, does not
- require expensive permits or relatively
- expensive gear, and provides a low
- barrier-to-entry opportunity for new
- participants in the commercial fishing
- industry.

MARINE-DEPENDENT INDUSTRIES



Commercial fishing and related waterfront activities in Port San Luis generate jobs, provide recreational opportunities, and draw tourists from around the world. The Commercial fishing industry is comprised of the fishing fleet as well as businesses that focus on seafood processing, distribution, and sales, and those that contribute to the maintenance of vessels and equipment (diesel, electrical, welding, etc.), all which generate employment and define the local fishing community.

Key sectors of the marine economy include:

- Commercial fleet of primarily small-scale family owned operations that target a wide diversity of species, with a equal diversity of gear on a broad range of habitats
- An offloading and storage facility for Pacific hagfish
- One of the only self-service haulout and boatyard facilities in California with a 7.5 ton capacity trailer boat hoist and mobile travel hoist with 60 ton capacity
- Charter vessels that conduct thousands of recreational fishing trips every year
- Visitor service facilities, including three restaurants, a live fish retailer, a small market, kayak rental, a surf school, and paddle board concessions, chandlery, RV camping, and self-serve hoists

All waterfront activities fall under the purview of the Port San Luis Harbor District, which manages day to day operations, maintains physical infrastructure, represents the community in the pursuit of federal and state funding, and provides necessary safety and security services. Together, these businesses and services generate local jobs and business ownership, spur investment and spending in the community, and ensure a safe and functioning harbor.

Port San Luis is characterized by a uniquely strong sense of community within the commercial fishing and across the marine-dependent industries. This contributes to the port's ongoing economic strength.

"[Hagfish] is a high volume fishery, but low dollar. There's not a lot of room for error," -Owner, Wilcox Fisheries, personal communication, 2017

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EXPANDING MARKETS

Port San Luis leased the former ice house on Harford Pier to Wilcox Fisheries in March 2016 after accepting its proposal to establish an offloading and storage facility for Pacific hagfish and support an expanding market opportunity. The ice house, which was shuttered in 2008, required approximately \$100,000 in renovations, including fabricating and installing a new hoist. Wilcox Fisheries has partnered

with a buyer from Los Angeles that serves markets in Asia where Pacific hagfish are in demand. Wilcox Fisheries' owner expects to invest at least another \$20,000 in improvements to the facility over the next few years as activity increases. There are currently three boats fishing full time for Wilcox Fisheries, and one part time. The facility supports three full-time and one part-time position.

The expansion in infrastructure and landings has made Port San Luis the highest earning port in the state for Pacific hagfish in 2016.

BOATYARD AND HAULOUT FACILITY

The Port San Luis Boatyard came under new ownership in early 2014 and presently employs five people including the two owners, provides launch services for trailerable boats up to 28 feet, a self-service boatyard, tackle and marine supplies, and outboard motors.

The small boat hoist and mobile travel hoist launched approximately 4,150 boats in 2016, at \$15 - \$40 per launch depending on the size of the boat and type of trailer. In 2016, the boatyard invested in tenant improvements that enabled them to carry more inventory and better meet the needs of the local commercial and recreational fleets.

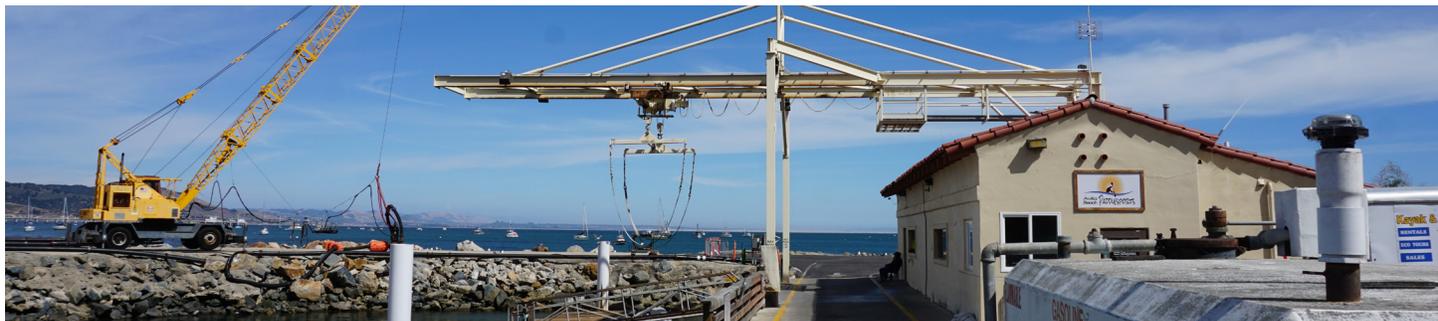
The boatyard is one of the few in the state where fishermen can service their own boats. The facility makes tools available for rent, and can also provide or arrange for specialty services, including a crane operator to remove masts, welding, electrical, diesel, and other technical services.

COMMERCIAL PASSENGER FISHING VESSELS

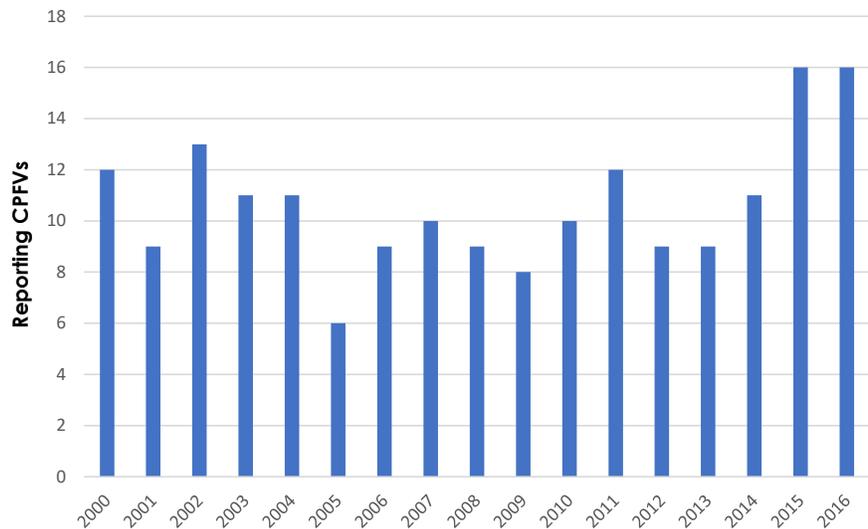
Commercial Passenger Fishing Vessels (CPFV), or charter fishing vessels, have played a significant role in Port San Luis since its early days, for visitors and for locals. The CPFV fleet provides access to the ocean for those who do not own a boat, and makes a key connection between people and the marine ecosystem. The Harbor District currently leases 2,160 square feet on Harford Pier to charter fishing operations. The number of charter fishing vessels in San Luis Obispo County grew 78%, from 9 in 2013 to 16 in 2015 and 2016. (Note, data is only available from CDFW on the County level.)

- “We have captains coming from as far
- away as San Diego to work on their
- boats.” -Owner, Port San Luis Boatyard,
- personal communication, 2017

- San Luis Obispo County drew the
- second highest number of CPFV
- passengers in Northern California in
- 2015 and 2016, according to CDFW,
- outpacing Monterey/Moss Landing/
- Santa Cruz, and Princeton/Bodega
- Bay. Only San Francisco saw a higher
- number of passengers.



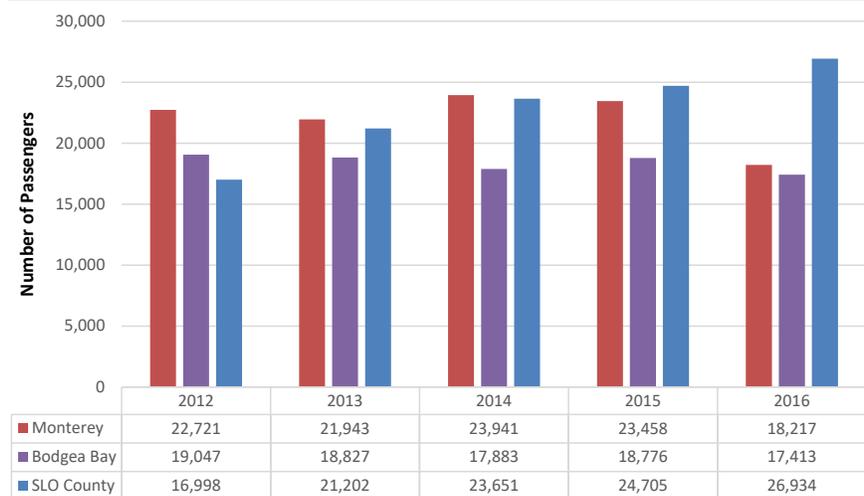
San Luis Obispo County, Reporting CPFVs, 2000 - 2016



Source: CDFW

The number of people participating in charter trips in San Luis Obispo County has risen every year since 2012, with 24,705 passengers in 2015, and 26,934 passengers in 2016. Revenue from charter fishing trips range from \$1.5 million to \$3.7 million in 2015 and \$1.6 million to \$4 million in 2016, depending on the length of the trips taken. Charter activity in San Luis Obispo County outpaced Monterey and Bodega Bay in 2015 and 2016.

CPFV Anglers, 2000 - 2016



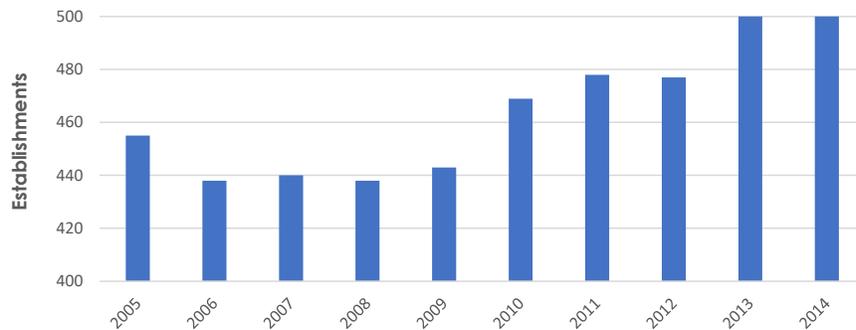
Source: CDFW

EMPLOYMENT

Avila Beach has a population of 1,279, and according to the 2015 census, of which approximately 720 people are employed. There was a total of 2,081 jobs centered in Avila Beach in 2015. Through extensive personal interviews and emails with commercial fishermen, dockside businesses, Harbor District staff, and close collaboration with the PSLCFA, it is estimated that commercial fishing supports approximately 40 to 60 full and part time jobs on the water and shore-side jobs, including the boatyard and haulout facility. A full assessment of employment is beyond the scope of this project.

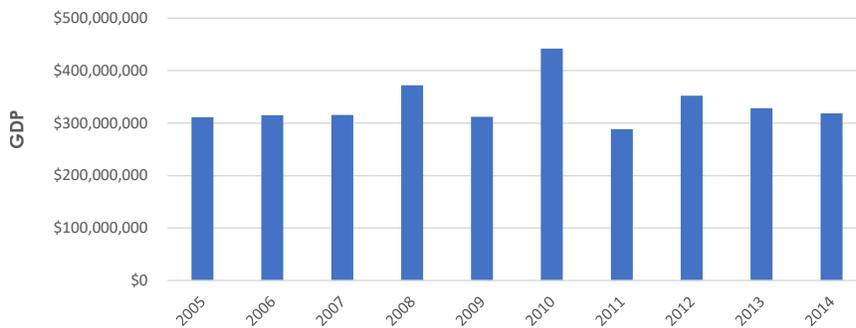
According to the National Ocean Economics Program (NOEP), the number of commercial fishing and ocean-related businesses in San Luis Obispo County has risen every year from 2012 to 2014 (the most recent data available).

Ocean-Related Establishments, 2005-2014



Source: NOEP

Ocean-Related GDP, 2005 – 2014



Source: NOEP

In addition, the Harbor District owns two ice machines located on the Harford Pier and operated through an operating agreement. Commercial fishermen report that due to the prevalence of the live fish and crab fisheries, neither of which require ice, the current level of ice production is sufficient.

Fishermen note that there is currently no bait facility in the Port. Most fishermen purchase frozen bait or use remnants from the fish cleaning station.

The Harbor District is managing the Harbor Terrace development effort that will provide parking for RVs off of Avila Beach Drive, more affordable overnight services (cabins, tents, and RV), swimming, BBQ facilities, parking, stores and restaurants, as well as extensive storage for the commercial and recreational fishing operations and Harbor District uses on the 32 acre site. The Harbor District managed the project from its inception, working closely with the California Coastal Commission and Coastal Conservancy, integrating the build out into their Local Coastal Plan, attaining a Coastal Development Permit from the County in 2014 and ultimately entering into an Exclusive Right to Negotiate with a developer in 2017. The project will likely break ground in 2018.



CONCLUSION



Port San Luis is a vibrant commercial fishing community that has generated more than \$62 million in earnings between 1990 and 2016 and provides dozens of jobs for skippers and deckhands and related jobs through vessel and gear maintenance and the seafood distribution chain.

The commercial fishing fleet has adapted extremely well to changes in regulation and markets and made huge gains in expanding the diversity of target species in the last 27 years. This is evidenced by the growth in the Dungeness crab, brown rockfish, black-and-yellow rockfish and Pacific hagfish fisheries among others as well as growth in key metrics such as overall landings and earnings.

The Port San Luis commercial fishing industry has a strong voice in the PSLCFA and participation in the management of the Harbor District, with two PSLCFA members on the Board of Harbor Commissioners. Participation in these processes and communication and cooperation through formal associations are more hallmarks of adaptability, leadership capacity, and resilience.

Through ingenuity and hard work, the Port San Luis commercial fishing community has maintained economic activity through very difficult times as a result of pressure from higher return uses on the waterfront, competition from inexpensive foreign imports, rising costs, and increasing and complicated regulations. As such, fishermen, with the support of the Harbor District, have maintained key infrastructure and services like fuel, ice, and offloading hoists and are now generating growth in landings and earnings. This is directly evidenced by earnings at the dock rising over 300% from a 20-year low of approximately \$996,000 in 2008 to \$2.7 million in 2016.

A strong history in commercial fishing, current increases in earnings, landings and price per pound, the attraction of new participants, and a strong voice in the management of Harbor District point to continued stability and value for commercial fishermen and Port San Luis.



