AN INVENTORY OF NORTH CAROLINA FISH HOUSES

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Executive Summary

This inventory of North Carolina fish houses provides an assessment of seafood wholesale facilities where domestic product is landed and distributed to market. One-hundred seventeen fish houses were tallied fall of 2006, including 78 fish houses in operation and 39 businesses that had recently closed or were sold and under contract. This represents a 33 percent reduction in seafood packing capacity since 2000 – most of which occurred in the central region. The main impetus for the decline was decreasing profits due to an influx of less expensive imports coupled with increasing operating costs. Other factors include labor shortages, stricter fishing regulations, declining water quality, scarcer fish stocks, and development pressures.

Fish house operators who lease their property were most vulnerable to loss of waterfront access. Fishermen using historically-established but informally-held landings, creeks, and community harbors were also at high risk of losing water access. Property owners faced rising property taxes in addition to declining incomes. Respondents expressed concern for the future of supporting infrastructure, including marine railways and repair facilities, seafood trucking services, gear manufacturers, and boat builders.

The paradox is that the state's commercial fishing industry is contracting just as per capita consumption of seafood in this country is rising. In particular, the market demand for local commercial commodities has been growing since 2001. Most respondents expressed a desire to remain in business citing a love for their work, culture, and community. Needs cited by industry members include greater flexibility and opportunity in harvesting practices, strategies for competing against imports, improved water quality, property tax breaks, and business development support.

"We have to have a shore."

Chowan River fisherman

Introduction

North Carolina commercial fishermen, like fisheries-dependent workers across the United States, face wrenching economic, political, and environmental changes that directly affect their livelihood. The cumulative impact of these factors has reduced the economic viability of the commercial fishing industry in the last decade; declines in numbers of fishermen, fish houses, and seafood landings have accelerated in just the past five years. Changing conditions are compelling remaining participants to reassess their markets, fishing methods, and even commitment to the state's fishing industry.

A primary factor affecting the fishing industry is globalization. Growth in a worldwide seafood market has not yet expanded opportunities for North Carolina fishermen. Rather, the value of domestic-caught seafood has declined due to a flood of less expensive, farm-raised imports into United States markets (Vannuccina 2004). For example, in 2004 fishermen were receiving less per pound of shrimp than they did in the late 1960s when adjusted for inflation (NC Division of Marine Fisheries 2004a), a significant impact considering shrimp has long been one of the state's most valuable fisheries. Catastrophic declines have also occurred in the blue crab fishery – also one of the most lucrative fisheries in North Carolina - undercut by imported crabmeat. The majority of the state's picking houses have closed since the late 1990s. Of 45 certified plants in 1982, 17 operated in 2005 and 13 in 2006 (North Carolina Shellfish Sanitation, personal communication). Imports of finfish such as flounder and grouper are also

stressing the industry. Low market prices have coincided with soaring fuel and maintenance costs, further eroding profit margins for North Carolina watermen.

Another factor affecting the seafood industry is fisheries management. State and federal fishery regulations have increased in number and complexity, curtailing where, when, how, and what fishermen can harvest. Federal regulations have virtually eliminated the large mesh gillnet fishery of Pamlico Sound and the offshore monkfish and dogfish fisheries; the South Atlantic Marine Fisheries Council recently passed crippling restrictions for the snowy grouper fishery. State managers reduced the harvest of southern flounder, the most valuable fin fishery in North Carolina, by thirty percent, and reduced red drum - the designated state fish - to a bycatch fishery (North Carolina Division of Marine Fisheries 2005, 2001a). Striped bass, declared recovered by the federal government, continues to be tightly restricted despite an abundant stock. Several respondents expressed strong dissatisfaction with management on the state and federal levels, and have become distrustful and disinclined to participate in data collection or on advisory committees.

Declining harvest opportunities have contributed to a labor shortage in the seafood industry, particularly pertaining to captains and crewmen on fishing vessels. Processors worry that the lack of "young blood" in the industry will cause its extinction unless job incentives are made available to attract new entrants. The present "aging out" of North Carolina commercial fishermen and lack of new entrants is well documented (Bianchi 2003, Cheuvront 2002). This has significant sociocultural and economic ramifications, as the industry has long exhibited an impressive generational continuity and cultural identity (Garrity-Blake 1996).

Environmental conditions have also taken a significant toll on the industry. Severe hurricanes, particularly Floyd in 1999, filled the rivers and sounds of North Carolina with waste, toxins, and sludge, causing hypoxia or "dead water" zones that brought lasting changes in the health of fisheries stocks (Cheuvront 2005). Fishermen have noted changing migratory patterns in stocks such as Atlantic croaker and gray trout, and some have cited global warming as a possible cause of these scarcities and shifts. Two-thousand-three-hundred-eighteen acres of productive shellfish waters have been permanently closed since 2000 due to stormwater runoff (North Carolina Shellfish Sanitation, personal communication).

As fishing families grapple with loss of markets, stricter fishing regulations, and declines in water quality, an unprecedented demographic trend is rapidly transforming coastal communities. The total population of the northern banks area, including Dare County, has grown by more than 120 percent since 1970, while the Core Sound region, including Carteret County, has grown almost as much (Fish et. al. 2003). Even the western Pamlico Sound region, long a sparsely populated area, has shown population increases of up to forty percent since 1970 (ibid), and growth will accelerate with recent efforts to market the "Inner Banks." Much of the incoming coastal population is comprised of second-home owners, as a national real estate boom and housing bubble have attracted investors and developers seeking to buy up waterfront property for new homes and private marinas (Garrity-Blake 2005). Soaring property values have led to a rise in property taxes in coastal areas; residents in communities such as Ocracoke, Topsail Island, and Emerald Isle recently experienced property value increases of 300 percent or more (ibid).

Coupled with declining fortunes from commercial fishing, these demographic and property value increases have put tremendous financial pressure on fishing families. Infrastructure critical to the sustainability of the fishing industry is weakening against the forces of privatization and gentrification, as fish houses, marine railways, and working harbors give way to high-dollar developments. Expanding permanent closures of shellfish beds near new home sites are but one example of the environmental impacts of such developments have direct impact on fisheries-dependent families (North Carolina Division of Marine Fisheries 2001b, 2001c).

These economic, regulatory, demographic, and land-use shifts are threatening the viability of the state's fishing industry, fisheries-dependent communities, and a culture that has characterized coastal North Carolina for hundreds of years. Since 1997 statewide landings have steadily declined, and 2005 brought the lowest seafood landings and value on record. The ex-vessel value has dropped from $108,325,352 in 2000 to $64,896,645 in 2005 (North Carolina Division of Marine Fisheries 2006:II-81). The number of Standard Commercial Fishing Licenses has dropped from 6,900 in 2000 to 6,171 in 2006 (ibid:I-8). Fishermen have had to rely more on non-fishing work for supplemental income (Cheuvront 2002, Garrity-Blake 1996). A reduction in fishing effort has significant implications for the economic and cultural heritage of small coastal communities, and such implications extend beyond communities to include, for example, a reduction in the availability of North Carolina seafood to the public at a time when the public is demanding more local and regional seafood, particularly in coastal markets.

Methods

An inventory of fish houses was collected by using snowball sampling methods to compile a comprehensive list of seafood wholesale businesses. We acquired this list from a variety of sources, including the North Carolina Department of Agriculture's Seafood Directory. We also consulted commercial fishing advisors to the North Carolina Marine Fisheries Commission from the three coastal regions, as well as Division of Marine Fisheries staff. We also asked businesses to name other seafood wholesalers operating in their region. Most of the fish houses in our sample packed a variety of commodities, including crabmeat.

We defined fish houses as facilities that packed North Carolina wild-caught finfish and/or shellfish for wholesale distribution. Although this was our base criteria, many variations were included in our sample. For example, several businesses packed imported seafood as well as domestic products. Some sold to retail markets or operated their own retail market. Although most facilities were located on the water, not all were dependent on direct water access. We did not count aquaculture operations, soft crab operations, roadside vendors, seafood truckers, retail shops, and importers. We chose to focus on businesses that exclusively serviced commercial fishermen by providing a place to land, process, and distribute domestic wild-caught seafood. Our rationale for this focus was the heightened vulnerability of traditional-use working waterfronts in North Carolina, long the economic center of many coastal communities.

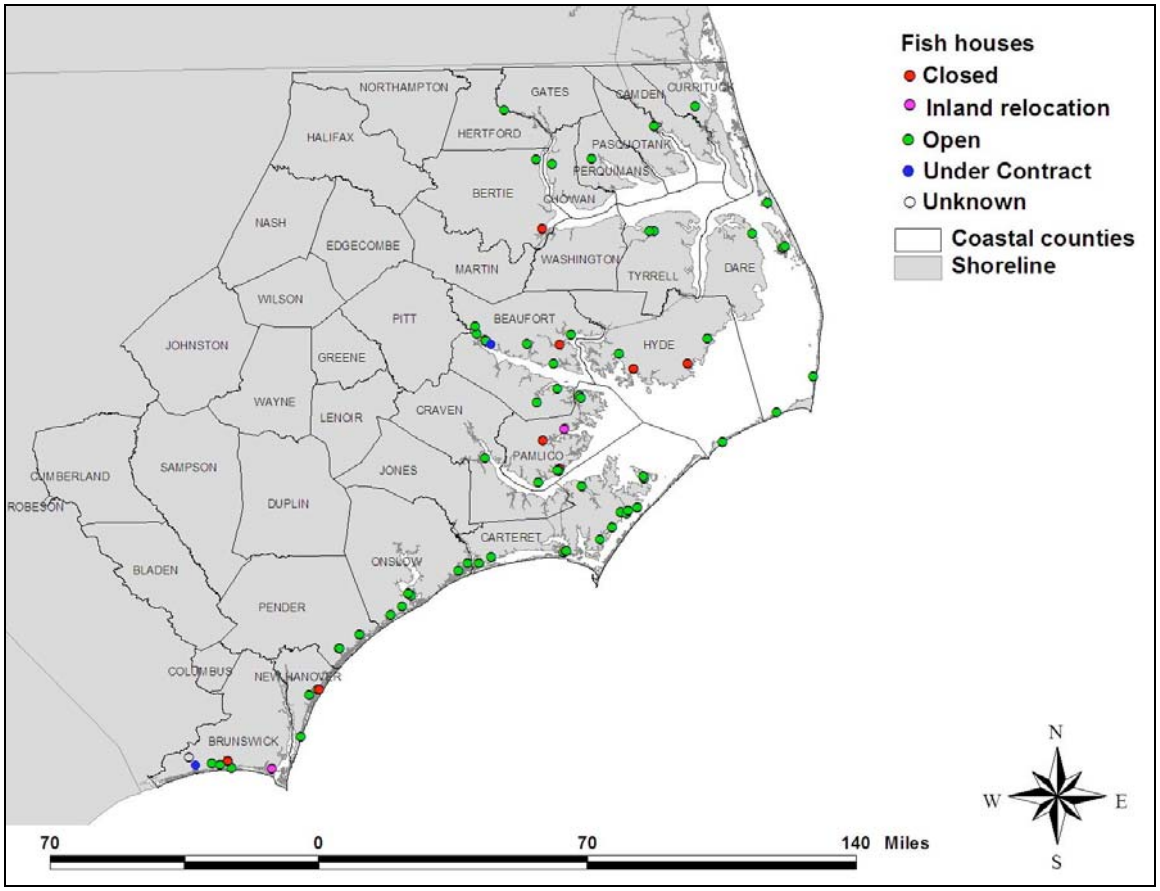
Of the 78 businesses currently in operation, we made on-site visits to 45 and phone contact with an additional twelve. We administered a questionnaire (Appendix A)

designed to gauge the status of businesses, future plans of companies, and pressing issues and needs. We compiled a data bank that included, among other information, businesses' name, locations (GPS-assisted mapping), number of employees, yearly income, and surrounding infrastructure, which will be available for others conducting socioeconomic research on the state's fishing communities. We photographed and mapped the majority of businesses we contacted. The resulting inventory includes a tally of fish houses/ companies that have closed since 200l. We did not include fish houses that went out of business prior to 2001. This would have required an in-depth historical assessment of fishing communities that was beyond the purview of this project.

Cape Point Fisheries, Beaufort, North Carolina

Findings

We counted 117 fish houses in North Carolina of which 39 closed or went under contract for sale within the past five to seven years (Map 1). The remaining number of fish houses currently in operation (n=78) may have changed further since our survey given the industry's rate of contraction. The trend, however, is a clear decrease in the number of seafood packing facilities. Our assessment indicates that wholesalers have declined 33.3 percent since 2001 (Table 1).



Map 1. Fish Houses of Eastern North Carolina.

The Northeast Region

The northeast region includes Currituck, Camden, Pasquotank, Perquimans, Gates, Hertford, Chowan, Bertie, Washington, Tyrrell, and Dare (including Hatteras Island) counties. This region currently holds the highest seafood landings in North Carolina due to high-volume ocean fisheries (e.g. croaker, squid, summer flounder) packed out of the community of Wanchese in Dare County. The northeast region also has a relatively healthy blue crab fishery. The crab fishery has particularly suffered with the loss of picking houses caused by the influx of imported crabmeat. The live "basket" market to Baltimore has kept the crab fishery viable, as has the soft crab market, but recently the basket market has been undercut by competition from Louisiana.

We noted twenty seven fish houses in the northeast, including five that have recently closed or come under contract. The northeast region is home to the Chowan river herring fishery, open at the time of this survey but closed by proclamation in late 2006; the river herring fishery will likely remain closed after the fisheries management plan is improved, causing more fish houses to close in the Albemarle Sound area.

Full Circle Crab Company, Columbia, North Carolina

The Central Region

The central region includes Beaufort, Hyde (including Ocracoke Island), Craven, Pamlico, and Carteret counties. Carteret County has long competed with Dare for the state's number one position in fish landings, but has fallen behind Dare since the closure of the last menhaden processing plant in 2004. The central region has experienced the highest number of fish house closures in the state. This is largely due to the large number of small proprietorships that have closed in Pamlico and Hyde counties. According to the state's largest seafood trucking company, Evans Seafood, these areas have been heavily dependent on crabbing and "pan" fish (e.g. small flounder and trout). Poor crab landings in the Pamlico Sound area in recent years, picking house closures, and tighter fishing regulations have taken a toll in these rural, isolated areas of the "Inner Banks." The large vessels that trawled Pamlico Sound for shrimp have been diverted to northern ocean fisheries if the vessel owner held a scallop or summer flounder permit, or have remained

dockside, given poor shrimp prices. Formerly thriving fishing communities such as Belhaven, Swan Quarter, Vandemere, and Bayboro are now quiet due to declining harvest activity.

We noted 70 fish houses in the central region, twenty nine of which were closed or under contract. We were unable to track down several of the smaller operations reported to be closed but included them in our count in reference to Evans Seafood trucking company's delivery records.

The Southeast Region

The southeast region includes Onslow, Pender, New Hanover, and Brunswick counties. Seafood companies in this region do not have the advantage of large estuarine systems such as Pamlico and Albemarle sounds, and are largely dependent on ocean fisheries. The high degree of development in the southeast has caused a decline in water quality in the area's rivers, creeks, and bays, causing shellfish closures and a stressed shellfish market. The southeast region has been long dependent on the ocean shrimp fishery of North and South Carolina. Because of low shrimp prices and high fuel costs, large trawlers can be found dockside and stripped of gear in communities such as Sneads Ferry, Varnumtown, and Shallotte. The most successful fisheries in this area seem to be Spanish mackerel, dolphin/wahoo, and deep water fisheries such as snapper, grouper, and black sea bass. The deep water fisheries are subject to increasingly restrictive federal regulations, however, and their future viability is in question.

We counted 20 fish houses in the southeast region, including five closed or under contract.

	Total # Fish Houses Listed	# Fish Houses Open	# Fish Houses Closed/Under Contract
Northeast Region	27	22	5
Central Region	70	41	29
Southeast Region	20	15	5
Total of All Regions	117	78	39

Table 1: Fish Houses in North Carolina in Total and by Region

A 33 percent reduction in North Carolina fish houses in the past five to seven indicates significant social, cultural, and economic changes occurring along the North Carolina coast (Maps 2 and 3). Of all the stresses reported by fish house owners, the top three were imported seafood driving down domestic prices (n=17), stringent federal and state regulations that limit harvests (n=16), and a dearth of younger workers choosing the commercial fishing trade (n=16). Ten worried about lack of waterfront access. Other stresses include high fuel prices, scarcity of stocks, tedious government-required paperwork, inadequate influence over policy decisions, and the shoaling of ocean access areas such as Wainright's Channel, Oregon Inlet, Bear Inlet, and Brown's Inlet.

Economic pressures on the seafood industry are affecting traditional processor-fishermen relationships. Fish houses have long provided a variety of services to the independent fisherman, such as free dockage, free ice, and bait sale in exchange for their patronage. Processors have been known to extend credit to fishermen in the event of an engine breakdown or other emergency situations. Processors who hire captains have been willing to fuel up company-owned vessels so that crews can search great distances for

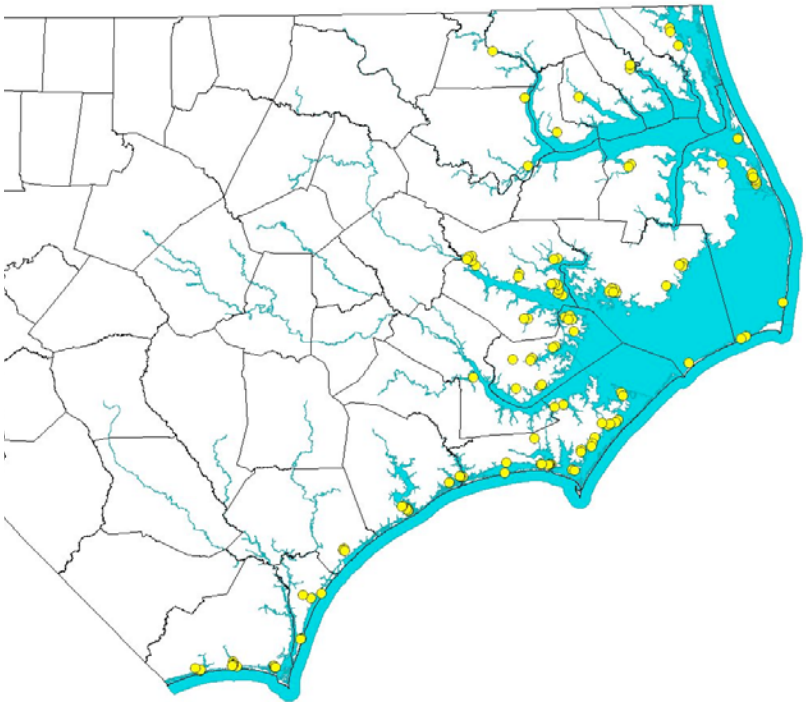
fish. Today processors are less willing or able to exert such privileges due to thinner profit margins. One fish house owner in a pricey community recently evicted commercial vessels from his docks, as recreational boaters were offering to pay high slip rentals.

A change in the number and composition of fish houses is an indicator of changes in the industry as a whole, including the larger system of fishermen and fleets, distribution networks, marine railways, and suppliers such as gear manufacturers. When one part of the industry changes or suffers, it affects the rest of the system in ripple-effect fashion. For example, seafood trucking companies have been forced to reduce the number of pick-ups to remote fish houses having a lower volume of seafood. In turn, fish houses must adjust to moving fresh product on a more infrequent delivery schedule. Changing fishing regulations might mean changing mesh sizes in nets. Fishermen are faced with having to buy new gear, while gear manufacturers are fewer in number due to declining demand for their products and services. Fishermen report having to steam greater distances to get their vessels hauled and painted, as marine railways have become fewer in number.

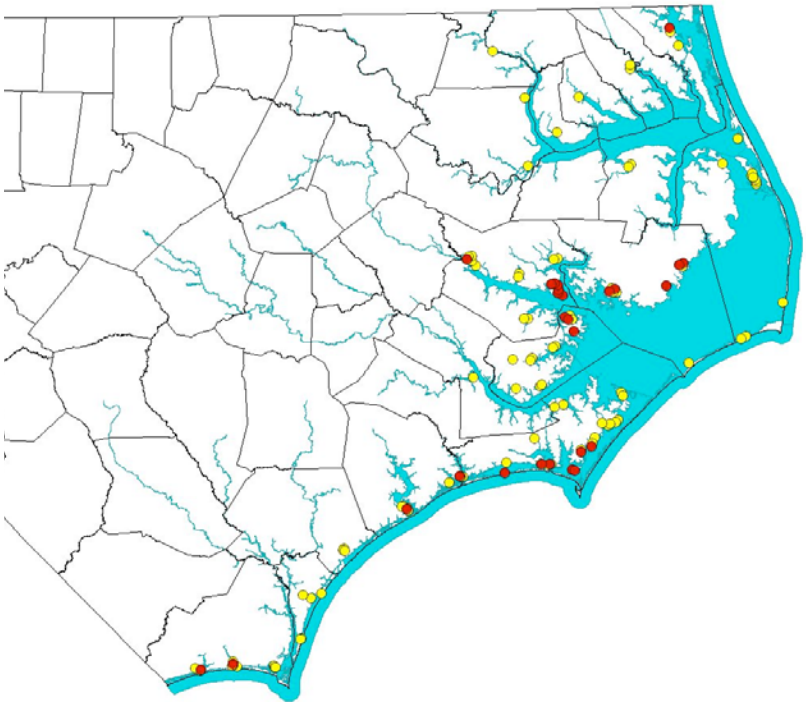
Development pressures are taking a toll on the commercial industry as fish houses are sold and the properties are converted to private, residential use. With the closing of each fish house, numerous fishermen lose access for dockage, unloading, and re-supplying. Beyond the immediate impact of fishermen losing access, the conversion of a fish house into high-end residential property changes the very character of small, coastal communities. Fishermen report that the influx of condominium dwellers and second-home owners ushers in a host of new issues, such as complaints about trucks, boats, gear, and the noisy bustle and clutter of a typical working waterfront.

As more coastal property is converted to high-end residential end, property taxes rise as well, putting further pressure on financially strapped fish house owners and fishing families. Harkers Island, for example, has been long known as a fishing community and lost its last fish house in 2006. Now Harkers Island fishermen must deliver their harvests to Beaufort or other distant locations. In addition, property values have increased some 300 percent with the proliferation of up-scale developments. A growing number of native Harkers Island are living off-island in more affordable manufactured-home communities such as McKay Park in Gloucester - known as “Little Harkers Island.”

Harkers Island Fish House: Closed



Map 2. Sites of Inventoried North Carolina Fish Houses.



Map 3. Sites of Inventoried North Carolina Fish Houses Showing Closures (in Red).

Other Trends

The majority of respondents owned the property on which their fish house sat (n=36), while a minority leased the property and were most vulnerable to losing their site (n=7). Four businesses were planning to move off-water to more affordable property. Relocations were in response to high waterfront property values, but it is not clear if this is a prevailing trend, and whether this adaptation will benefit the industry. Waterside sites will still be necessary for fishing vessels to tie up, unload, and get serviced.

While most of those surveyed (n=22) said that their business was declining, thirteen described it as steady or fluctuating. Three stated that their business was improving. Most agreed that volume, wholesale distribution to interstate markets was declining because domestic producers are losing market share to imports. Local or regional *intra*state commerce, however, was beginning to increase. This reflects a national trend in the growth of niche markets for locally-grown meat and produce that larger businesses may be reluctant or unable to serve. A number of processors are also attempting to diversify beyond commodities into retail "value-added" products such as frozen crab cakes and fully-cooked, refrigerated seafood entrees, because time-starved consumers are demanding more of their meals in a pre-prepared form.

Industry members noted positive aspects to their work despite the difficulties. When asked to name what they liked about their occupation, the majority of respondents described the social aspects of their industry: relationships with customers, fishermen, old-timers, their status in the community, and the continuation of a family business and family heritage. Indeed, interviews revealed an impressive social network stretching from one end of the coast to the other, and long-term relationships melded with a common

history, shared experiences, and the vitality of commerce. Most also cited their independence as a gratifying benefit of their trade.

Avon Seafood, Hatteras Island, NC

"I figure people will always want seafood."

Varnumtown fish processor

Conclusion and Recommendations

The North Carolina seafood industry is in a state of great change, experiencing a thirty three percent reduction in seafood processing/ wholesale facilities, with the central coastal and river basin region experiencing the greatest decline. To compensate for declining sales in northeast wholesale markets, the commercial industry has begun to shift their attention to in-state customers in local and regional markets. Part of this new strategy involves the manufacture of "value-added" seafood. This change can be attributed to declining availability of high volume fisheries to northeast markets (e.g. dogfish sharks, gray trout) and growing consumer demand for more domestic seafood in local and regional markets, particularly along the booming population centers of the North Carolina coast.

We predict that economic, environmental, and political pressures will cause a continued reduction in seafood processing facilities in particular as well as the industry as a whole. Some indicators, however, suggest that the industry is not collapsing, but is undergoing a painful transformation that could result in a very different commercial fishing model compared to the past.

In order to weather changes and remain viable, the fishing industry requires the following conditions:

- Continued improvement and restoration of water quality of coastal areas
- Incentives to encourage young people to enter the fisheries trade

- Availability of water access and supporting infrastructure
- Greater accessibility to local and regional markets

These conditions could be realized with strong state support and a commitment to ensuring a future for the fishing industry and the health of the resources on which they depend. Specific recommendations that would help ensure the industry's viability include:

- Promote programs that are critical to creating a market identity for North Carolina seafood products. Currently, local seafood processors have very little commercial visibility at the local or state level. At a time when the demand for local seafood is increasing, many consumers do not know where to buy local product – even along the North Carolina coast. CarteretCatch, which was begun in March 2006, is the first county-wide branding program in the country to promote local seafood products and enjoys strong community support. The state's seafood industry needs targeted marketing initiatives to increase consumer awareness of local products, particularly for high-value commodities such as blue crabs, shrimp, flounder, and shellfish.
- Direct local governments to map working waterfront areas, solicit which businesses wish to stay in operation, and encourage partnerships with the state to protect waterfronts through zoning and tax incentives or breaks. The state needs to protect its existing infrastructure to satisfy the increasing demand for local seafood.

- Establish a Working Waterfront Trust Fund for property acquisition and capital improvement projects benefiting the fishing industry similar to Maine's Working Waterfront Access Pilot Program (land purchases for fish houses and landings, improvements for processing facilities, harbors, and other supporting infrastructure). This would augment a growing tourism trade along the coast among visitors who value heritage education programs.
- Encourage fisheries managers to review details of the Fisheries Reform Act, particularly regarding fisheries management plans, to evaluate opportunities for easing harvest restrictions and enhancing flexibility for fishermen to move from fishery to fishery while continuing to protect fish stocks.
- Continue to implement the Coastal Habitat Protection Plan.
- Assist industry members in formulating strategies to remain an integral part of North Carolina's dynamic coastal economy (e.g. marketing, labor initiatives, and tax incentives). North Carolina Sea Grant could lead this effort through outreach and focus group meetings with industry members in the three coastal regions, and organize a commercial fishing summit with North Carolina's political leadership.

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Appendix A

North Carolina Fish House Survey

This survey has been funded by NC Sea Grant to profile the financial health and business needs of seafood packers/ processors. The survey is part of a larger effort to help the NC seafood industry stay competitive in a global economy. This information will gauge how foreign commodities and coastal development are affecting local businesses and what kind of support our industry needs to meet the growing demand for domestic seafood. A legislative committee will assess the value of working waterfronts to commercial fisheries and address access to public trust coastal resources; this information will be used in their assessment. Your participation is voluntary. Answer only those questions with which you feel comfortable.

1. Name of company and business owner.

2. Location of business (GPS, village, county) and *past number of fish houses in area* (trends).

3. Number of years this business has been in operation.

4. Size (# employees, # of fishermen who pack out, #/size company-owned boats/trucks, # slips/feet of dockage).

5. Estimated Gross Annual Sales: (<$250,000; $250,000 to $500,000; $500,000 to $1 million; greater than $1,000,000)

6. What services does your business provide to fishermen (e.g. marine railway, dockage, ice, bait, pack-out facilities, trucking)?

7. What percentage of your annual sales are derived from the distribution of *domestic* seafood harvested by local fishermen? Have your sales increased, decreased, remained the same over the past decade?

8. What is the most profitable retail and wholesale markets for *domestic* seafood (Location – cities, states, foreign countries)?

9. Do you sell *imported* seafood to retail/wholesale markets? What percent of your annual sales is derived from seafood imports? Have sales increased, decreased, remained the same over the past decade?

10. What products do you process (e.g. crabmeat, shucked oysters, boxed/iced fish, frozen fish fillets)?

11. Describe supporting infrastructure that best supports your business (e.g. truck routes, gear manufacturers, vessel repair/maintenance facilities, dockage, water access). Trends? Impediments?

12. Do you own or lease the land on which this fish house sits? What is the approximate acreage?

13. How much has your property values/taxes increased in the past five years?

14. Is an increase in property value beneficial, harmful, or inconsequential to you? Would you support a state proposal to offer an optional tax break assessing fish house property at "current use value" rather than market value?

15. How would you rate the overall health and general trend of your business (poor, fair, good, improving)?

16. What are the primary stresses on your business (e.g. market demand, availability of the resource, availability of workforce, moving product inland, limited capability to freeze/store local harvests, fishing regulations)?

17. What do you like most about your work?

18. Estimate your business's contribution to your community (economic, social, etc.)?

19. What are your future plans for your business (stay in business, pass it down, sell)?

20. If your business is in decline, what do you feel could keep it operational? What are your most urgent needs?

21. Would you consider new marketing strategies (branding, direct advertising, "heritage tourism" programs) as a means to improve overall sales?

22. Would you be willing to be part of an advisory committee/working group to develop recommendations for enhancing our fishing industry's economic competitiveness?

23. Further thoughts/comments?