

# The Economic Status and Performance of the Gulf of Mexico Crab Processing Industry in 2009



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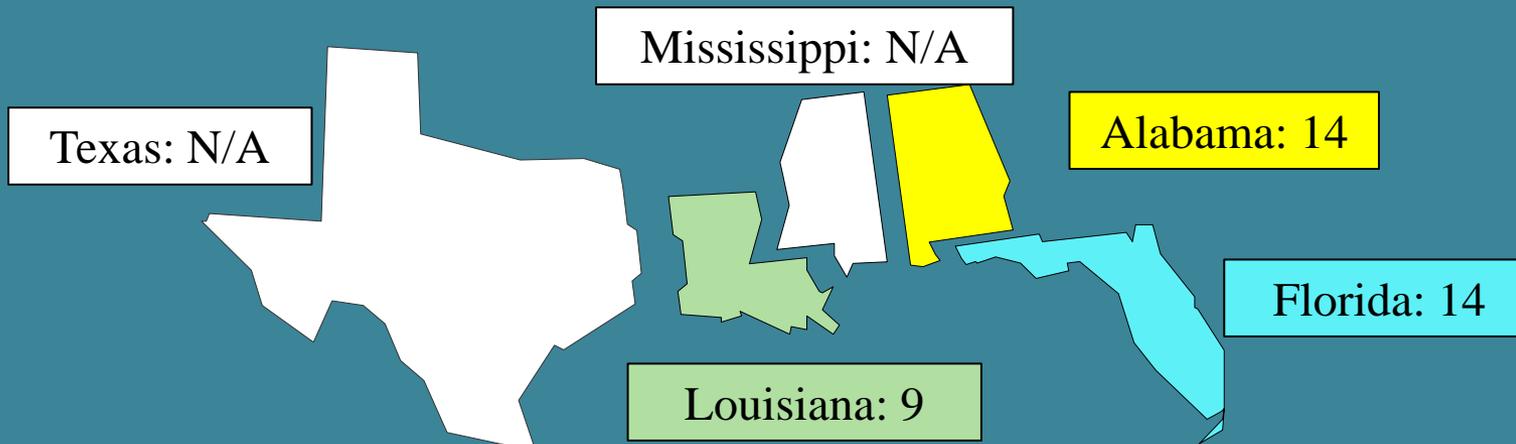
# Seafood Processor Survey

- The survey effort obtained responses from 106 seafood processors
- Selected from a pool of seafood processors who participated in the NMFS survey of seafood processors in 2009
- Conducted as in-person interviews by
  - University of South Alabama
  - University of Florida
  - Louisiana Department of Wildlife and Fisheries
  - Mississippi State University
  - Texas A&M
- Preliminary raw response rate for the Gulf of Mexico: 54.7%.
  - Alabama: 55%
  - Florida: 41%
  - Louisiana: 87%
  - Mississippi: 18%
  - Texas: 41%

# Marketing and Economic Analysis

- Investigation of the responses of respondents who were identified as processing or selling crabs or crab products
- Omitted respondents that said that 75% or more of their business costs were related to commercial seafood harvesting, purchasing seafood directly from commercial fishing (first receivers), or retailing
  - The remaining 98 respondents → **“Primarily Processors”**

# Over 37% of the Survey Respondents Who Were Identified as “Primarily Processors” Sold Crab or Crab Products

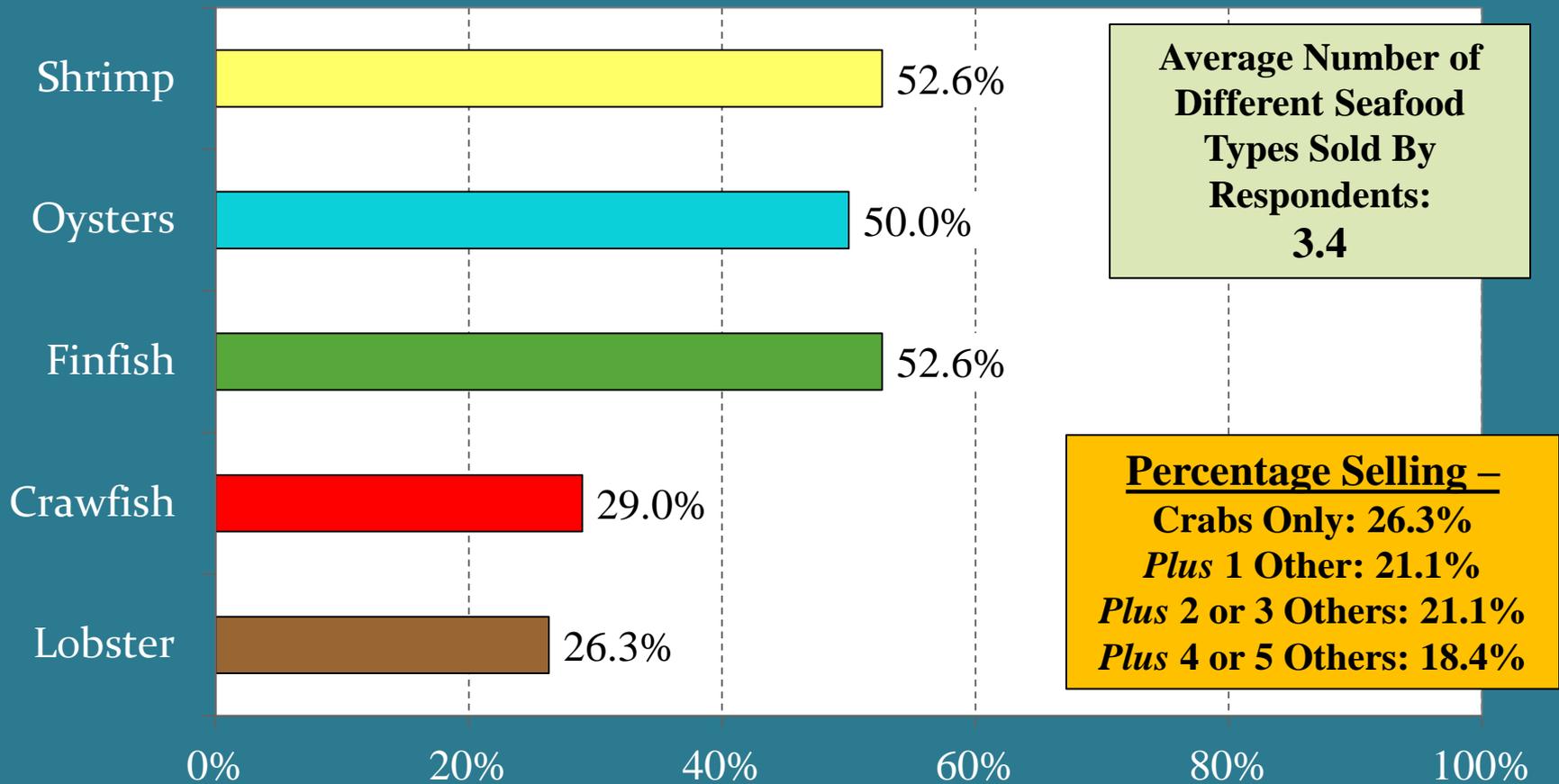


...Not all of whom provided complete data needed to conduct economic and marketing analysis

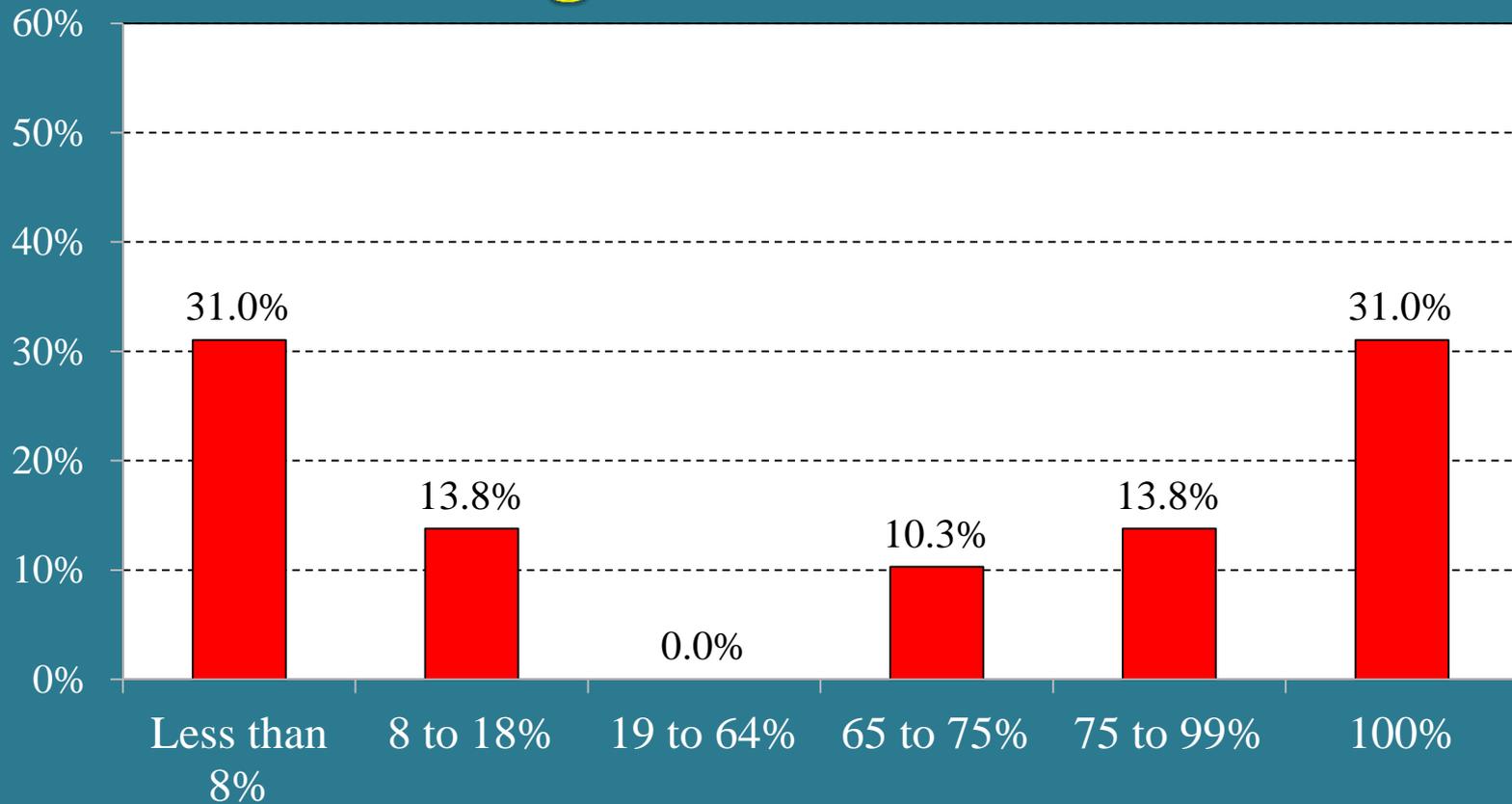
# Among Respondents Providing Usable Crab Sales Totals

- Total Crab Sales: \$47.5 million
  - Total Crab Sales as a Percentage of Total Seafood Sales by All Respondents: 4.99%
- Average Crab Sales per Crab Processing Respondent: \$1.8 million
  - Average Total Seafood Sales per Crab Processing Respondent: \$18.2 million
  - Total Crab Sales as a Percentage of Total Seafood Sales by Crab Processing Respondents: 9.67%

# Percentage of Crab Processor Respondents Selling Other Selected Seafood Types



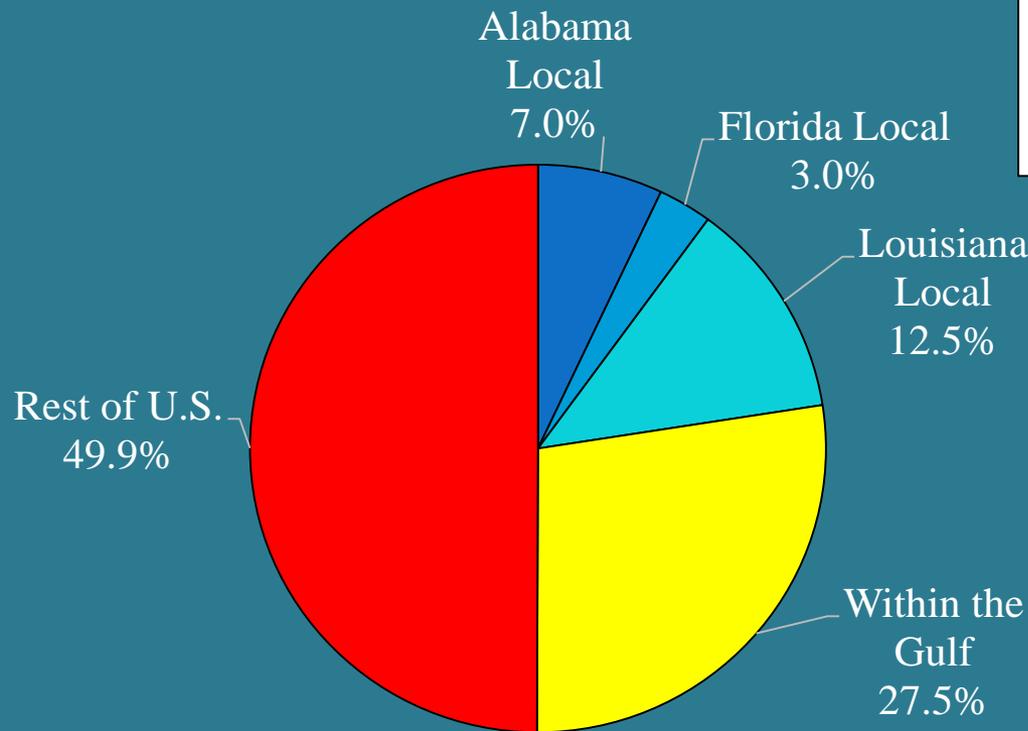
# Crab Processor Respondents' Crab Sales as a Percentage of Total Seafood Sales



Crab Sales as a Percentage of Firms' Total Seafood Sales

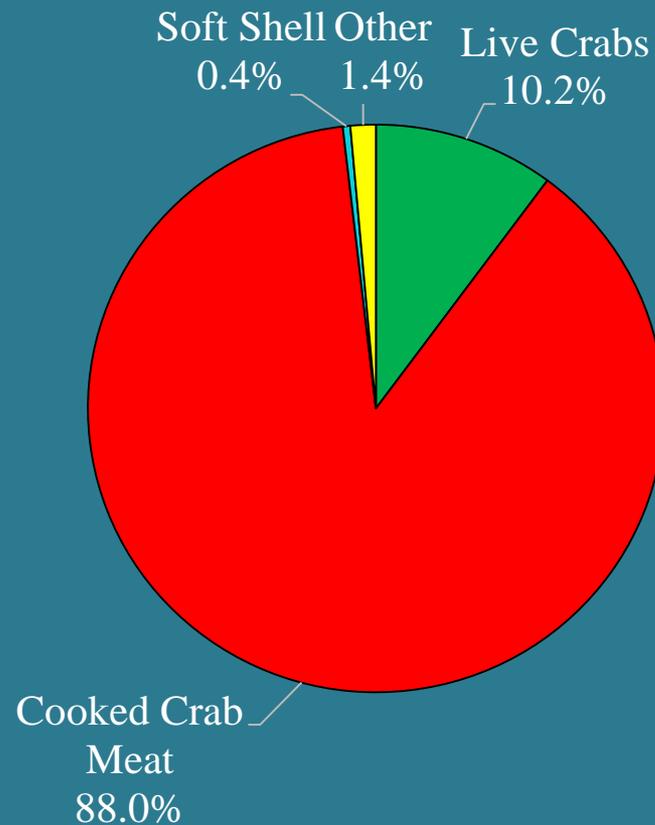
# Geographic Distribution of Crab Processor Respondents' Crab Product Sales

(By Sales Value)



“State” Local –  
Processed by a  
Respondent in State and  
Sold to a Customer in  
the Same State

# Distribution of Crab Processor Respondents' Sales by Crab Product Form (By Sales Value)



# “Majority Crab Processor”

Any Processor For Which Crabs Constituted  
More than 60% of the Firm’s Total Seafood  
Sales

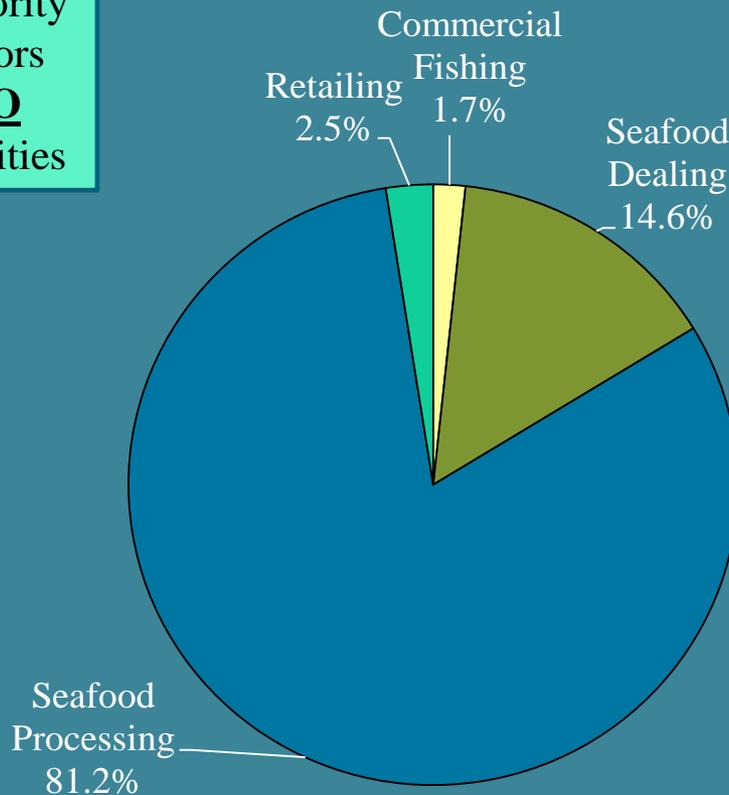
- Total Crab Sales: \$31.6 million
  - Total Crab Sales as a Percentage of All Crab Processors’ Sales: 66.0%
- N = 16

# Majority Crab Processor Business Characteristics

Parameter	Average	Median
Age of Business' Main Building	32.13	32
Number of Years at Current Location	20.6	22.5
Area of On-Site Building	8,665.8 ft <sup>2</sup>	4,600 ft <sup>2</sup>
Volume of Freezer & Cooler Space	67,299 ft <sup>3</sup>	8,430ft <sup>3</sup>
Full-Time Employees	30.9	9.5
Part-Time Employees	21.4	4.5
Total Number of Employees	52.3	35

# Business Activities as a Percentage of Majority Crab Processors' Total Costs

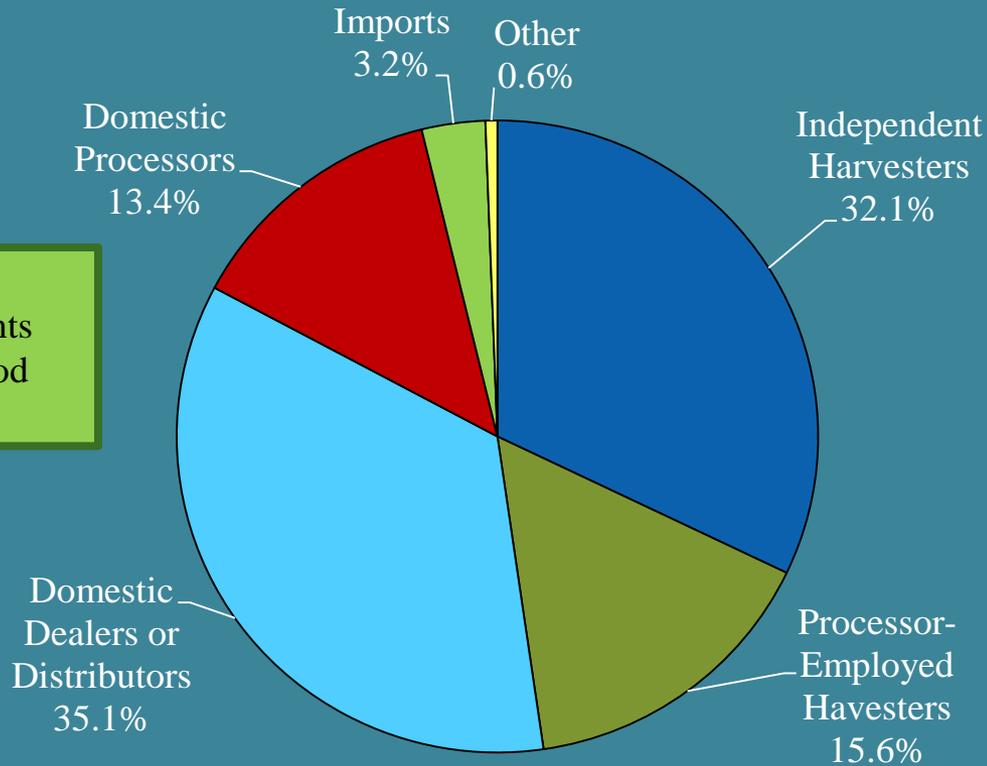
73.3% of majority crab processors reported **NO** retailing activities



93.3% of majority crab processors reported **NO** commercial fishing activities

**NOTE –**  
Costs are *not* necessarily attributed entirely to **crab processing**

# Percentage of Cumulative Seafood Costs Purchased from Following Sources by Majority Crab Processors



**NOTE:**  
87.5 % of respondents imported **NO** seafood directly

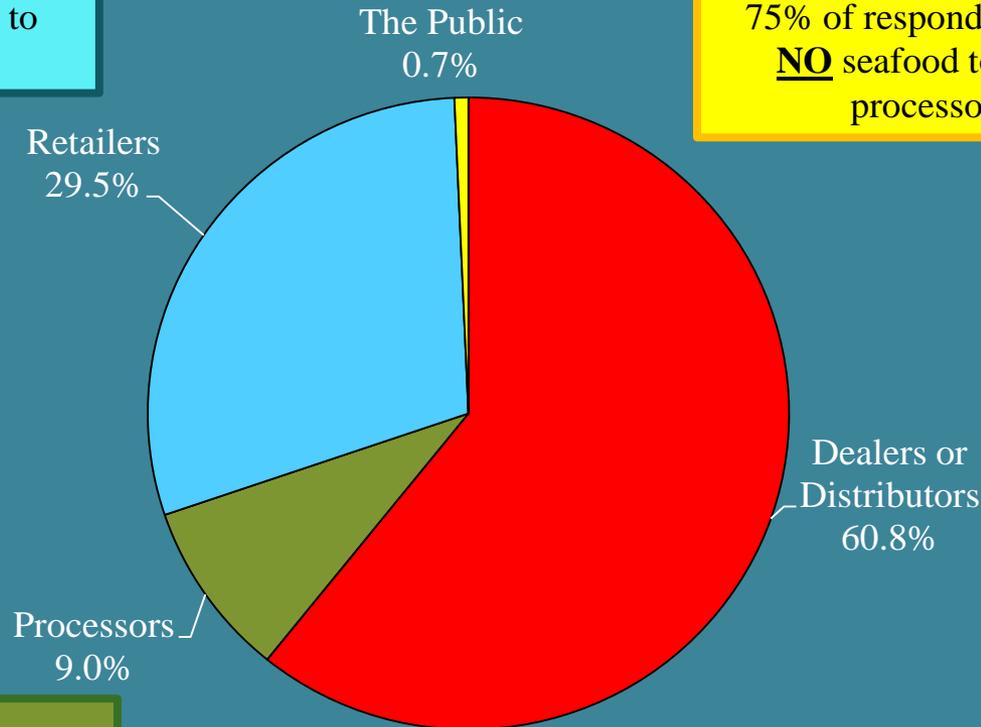
**NOTE:**  
75% of respondents purchased **NO** seafood from processor-employed harvesters

**NOTE –**  
This pertains to the cost of **all** seafood purchased - *not only crabs*

# Percentage of Cumulative Seafood Sales Sold to Following Customer Types by Majority Crab Processors

NOTE:  
56.3% of respondents sold **NO** seafood directly to retailers

NOTE:  
75% of respondents sold **NO** seafood to other processors



NOTE:  
75% of respondents sold **NO** seafood to other processors

NOTE –  
This distribution pertains to the sales of **all** seafood - *not* only **crabs**

# Upcoming Research

Economic Status and Performance of Gulf of Mexico  
Processors That Sell

Shrimp

Oysters

Finfish