Out-of-state marketing channels for North Carolina fresh seafood during 1974

John H. Summey

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MARKETS AND DISTRIBUTION PATTERNS
FOR NORTH CAROLINA FRESH
ICED SEAFOOD

by

Dr. John H. Summey

School of Business
East Carolina University
Greenville, North Carolina

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SUMMARY AND RECOMMENDATIONS

Distribution

The North Carolina fisherman operating on a small scale rises early in the morning, goes to sea and fishes. He returns in the afternoon with (or without) his catch which is then unloaded at a dealer's dock, iced down, and shipped out to its final market that same day.

Fishermen operating on a larger scale--which is the trend-- will go out for a week at a time or until they fill their holds with fish. When they return to port, the same process of unloading, boxing, icing, and shipping takes place.

The keystone in the whole operation is generally the fish dealer, as he is the one who assembles the seafood products in sufficiently large quantities to enable economical handling and shipping. The dealer is also the one most in touch with fluctuations in supply and their subsequent impact on prices in the different markets.

The fish dealers generally follow a three-step process in their approach to marketing the fresh iced seafood. The first step is an attempt to sell the seafood in North Carolina. This process is one of contacting or being contacted by other dealers and for wholesalers in the North Carolina coastal areas. Depending on the particular species involved and whether the dealer is in the northern, central, or southern fishing districts, wholesalers in the inland North Carolina areas may also be contacted.

It was previously believed that the vast majority of North Carolina fresh iced seafood moved to out-of-state markets. The portion which did make it into North Carolina markets was thought to be transshipped from New York or Virginia to the inland North Carolina markets. Estimates of the volumes being handled in this way ranged as high as 90 percent. The results of this study indicate that figure is far too high. A majority of the catch of all but one species used in the study was marketed within North Carolina--without leaving the state first. The proportion of in-state sales of each study species was:

Flounder	55.0%
Gray Trout	80.4%
Croaker	52.0%
Spot	60.5%
Bluefish	21.1%
Mullet	58.6%
Shrimp	55.5%

The second step in the fish dealer's effort to sell his supplies of fresh iced seafood is to contact wholesalers and/or distributors in other states. This effort is initiated when the available supplies cannot be absorbed by the in-state markets.

The third step in the dealer's effort to sell the seafood is to freeze it. Freezing is typically undertaken as a last resort. When the prices fall so low that it becomes uneconomical to transport the fish to market, the dealer will freeze the fish and hold them until the market conditions improve. Some species of seafood such as flounder or shrimp may also be frozen for speculative purposes if prices are low enough. These species have good year-round markets and frequently have high post season prices.

The three fishing districts varied considerably in terms of the markets they served. Table 2-1 provides some summary information on the percentages of each of the study species moving to coastal, inland, and out-of-state markets.

The northern district principally served out-of-state markets. Virginia, Maryland and New York received the majority of these out-of-state shipments. That portion of the volume which did stay in-state was absorbed by coastal area markets.

The central district served both in-state and out-of-state markets with the proportions varying by species. The states receiving the majority of the study species were Virginia, Maryland, Pennsylvania, New York and South Carolina. As in the northern district, almost all the product sold in-state was sold in the coastal zone.

From the data collected it appears that the principal suppliers of fresh iced seafood to the inland North Carolina markets are the dealers in the southern district. This district had the best balance in sales to in-state and out-of-state markets. A substantial amount of seafood moved into markets in the Piedmont.

The out-of-state markets for the southern district were less diverse than those in the other two districts. Only two states, Virginia and South Carolina, were significant out-of-state markets for the southern district dealers, but these two markets typically received proportionally low shares of the volume shipped.

Pricing

The North Carolina dealers generally follow prices, i.e., they ship where the prices are best. Supply and demand, therefore, are the dominant factors influencing where the product goes and what prices the dealers and fishermen are paid.

TABLE 1-1

Generalized Destinations for Fresh Iced Seafood
Moving from N.C. Dealers

	Northern District				Central District				Southern District			
	Coastal %	Inland %	Out of State %	Total Weight (1000 lbs)	Coastal %	Inland %	Out of State %	Total Weight (1000 lbs)	Coastal %	Inland %	Out of State %	Total Weight (1000 lbs)
Flounder	5.6	1.7	92.6	5,193	5.4	3.5	91.1	12,066	21.8	27.7	51.1	6,303
Gray Trout	34.6	10.2	55.0	2,669	95.4	0.68	4.0	6,075	49.2	31.9	18.9	355
Croaker	13.5	1.6	84.8	1,223	66.2	1.2	32.3	3,771	23.4	25.5	51.1	3,927
Spot	20.0	2.1	77.7	644	64.5	0.7	34.7	3,558	38.1	26.3	35.5	1.993
Bluefish	16.2	0.3	83.6	1,582	31.0	1.5	67.4	455	38.3	43.8	17.9	36
Mullet	19.6	0.04	80.2	537	75.8	0.97	23.2	362	25.1	49.2	25.7	915
Shrimp*	28.2	2.2	69.4	283	40.0	12.4	47.4	3,487	37.4	51.0	11.5	544

*Shrimp are in pounds with heads off.

The pricing of fresh iced seafood is a direct function of the supplies available and the level of demand for those supplies. The dominant influences on those prices are the supplies available on the major out-of-state fish markets such as the Fulton Fish Market in New York where supplies from all over the East coast are assembled and sold.

Prices are very sensitive to a variety of signals from the market place. If, for example, the buyers in the major markets are telephoning around asking for fish, that implies a short supply and good prices. One dealer commented that he could tell what prices were doing by how many buyers had called him during a given morning. Conversely, when the dealers start calling the buyers, that implies an over-supply and prices quickly drop.

The dealer ships his fish at night to arrive at the out-of-state markets the next morning. As a result, he really does not know what price he is going to get. If prices drop drastically, the buyers will usually call the dealer to see what disposition he wants to make of the seafood. The dealer can sell at the lower price, move the products to an alternate market, or, in some cases, bring them back to North Carolina.

Because of the uncertainty concerning prices, dealers typically do not quote a price to the fishermen. The seafood is received from local fishermen on an "open bill." The fisherman is paid at some later specified time after the transaction is completed. The dealer is usually paid a flat sum of money per pound as a handling fee plus the cost of ice, boxes and shipping.

When products are frozen for later sale, the dealer will sometimes pay the fisherman the low market price. The gain the dealer receives from later sale at better prices represents the return for risking capital. The fisherman benefits by saving at least some minimum return on his investment. The fishermen will usually complain loudly when prices drop. Pricing, however, is a function of supply and with only a few exceptions, not controlled by the local dealers.

Potential for In-State Processing.

A number of the dealers interviewed indicated that they had considered processing as a potential solution to the seasonal problem of over-supplies of fresh seafood and the related depression of prices. Most of these dealers had also rejected that alternative as of the time this study was conducted.

Two major factors in their decisions not to initiate capital investments in processing were the seasonality of the catches and the fact that the supply varies tremendously from year to year. Other factors operating as deterrents to processing included problems in distribution and the competition from established processors. One of the most significant factors from many dealers' perspectives was the limited supply of available labor. Not only was the labor not readily available, the cost of that labor was considered to be high relative to the productivity of the individual worker.

Mechanization offers a potential substitute for labor in seafood processing. Most of the coastal dealers, however, expressed a belief that high initial acquisition costs, high operation costs, and the high cost of borrowed capital prohibited investment in processing facilities. In addition, much of the equipment available at that time would not produce a product of very high quality, nor would it provide reliable service. In years with small catches, the dealers also felt that it would be difficult to obtain reasonably priced supplies of seafood for processing because of high demand for fresh iced seafood.

Recommendations

This research has provided basic information and insight into the markets served and the channels of distribution used by the North Carolina seafood industry. It represents a good starting point for efforts directed at assisting this vital industry to grow to its fullest potential. Implementation of the National Fishery Conservation and Management Act of 1976-- the two hundred mile coastal fishing zone--should provide a strong base for expanding that industry, at least in terms of the supplies landed. Failure to adequately develop market demand could result in over-supply and subsequently lower prices. This result might be good for the consumer but it might also cause some problems for the fishermen.

As indicated earlier in this chapter, prices are a function of supply and demand. Research supported by organizations such as Sea Grant and the various state agencies and Agricultural Extension Services has been traditionally directed toward increasing production.

The production orientation toward marketing was very common prior to and during the 1960's. In fact, the American Marketing Association's official definition of marketing was "the process of moving goods from producer to consumer."

Modern practitioners of marketing stress that sucessful marketing does not start with production of more goods. Today's consumers have become too sophisticated to buy just anything that is offered for sale. Instead, they purchase those products which provide them with the need-satisfying qualities which they want.

The expansion of the seafood market which will best aid the fishing industry is not based on excess supplies and subsequent lower prices. It is, rather, a market which is built on strong consumer demand (and satisfaction) at higher prices. To accomplish this goal will require increased knowledge and understanding of the motivating factors and need-satisfactions which prompt the consuming public to purchase seafood products.

The dealers expressed the need for several types of support for their industry, including: (1) increased knowledge of the consumer markets so that they could align their product with those needs, (2) assistance in improving packing-house administration, (3) information on cost-accounting relative to packing-house operation, (4) improved technology for seafood processing, (5) more money spent on marketing, perhaps following the model of the Florida marketing program, and (6) more information, assistance or research on marketing techniques, such as package design, market development, new market identification, and salesmanship. These six information and assistance areas represent research needs which should be actively pursued by future Sea Grant researchers.

CHAPTER 2

BASIC INFORMATION AND BACKGROUND

Introduction

Marketing deals with the satisfaction of human wants through exchange activities. This process relates to the provision of those goods which people want at the time, place, and the price that they want them. Markets are those places where the exchanges take place. They may be defined in terms of specific states such as New York, places within states, or as categories of buyers such as wholesalers and distributors. Knowledge about markets and the distribution channels for products moving into those markets is basic to understanding how an industry operates. The fishing industry in North Carolina has been in operation since pioneer days. As late as 1976, however, it was commonly believed that up to ninety percent of the North Carolina fresh iced seafood was shipped to out-of-state markets and then shipped back into the state for resale. It was also a widely held belief among public administrators that little to none of the North Carolina catch moved south of the state.

Recognizing the lack of accurate information on how the fishing industry operated, the Director of the North Carolina Fisheries Association requested that studies be undertaken to identify and provide information about the markets and channels of distribution for North Carolina's fresh iced seafood products. This report is a result of such a study.

Basic Industry Operations

The North Carolina fishing industry is spread along the entire North Carolina coast including the sounds, rivers, creeks, and sloughs. It consists of numerous small and large seafood landing points at which fishermen land their catches. These landing points are either at a fish dealer or fish house where the products are sold, or at a private landing from which the seafood is transported to a fish dealer.

The fish dealer functions as wholesaler, distributor, and/or broker who attempts to find a market for the fisherman's catch. The pattern is one of selling to the market that provides the best price after handling costs are deducted. The price is determined by the market forces of supply and demand. Prices in out-of-state markets such as the Fulton Fish Market in New York City are key factors in determining what the fisherman is paid for his catch.

The dealers are at all times acutely aware of the market forces at work as they are continuously telephoning or receiving telephone calls from other dealers and buyers both in-state and out-of-state. These phone calls are generally directed toward negotiation for supplies to meet their customers needs or toward finding out what the supply situation is so that they can evaluate how prices will be reacting.

When the dealer ships his seafood to an out-of-state market such as the Fulton Fish Market, he has an idea what the price range may be but he has no way of knowing what the exact price will be. If supply exceeds demand on a certain day, then he will get lower prices than expected. If supplies are short, he may get a good price for his products. The fisherman is usually paid after the seafood is sold. The dealer deducts his share of the payment and the fisherman gets the balance.

Scope and Limitations of the Report

This study examines the patterns of distribution and the markets served by North Carolina seafood dealers in 1974. The patterns examined include distribution of seafood from coastal dealers to in-state locations and to areas outside of North Carolina.

The species of seafood selected for inclusion in this study were flounder, gray trout, croaker, spot, bluefish, mullet, and shrimp. The specific species chosen were suggested by Alvah Ward, of the N.C. Department of Commerce, Division of Economic Development, as those species about which distribution and market information would be most useful.

Research Methodology

To obtain the information desired for this study, a detailed questionnaire was developed. That questionnaire was administered through personal interviews.

The selection of participants for inclusion in the study was carried out using a judgment sampling procedure. The intent was to interview all major fish dealers in each of the three coastal districts. The major fish dealers, it was believed, would account for the majority of the fish handled in the coastal area and thus provide a good overview of what was happening. For balance, a number of smaller dealers from each district were also included in the sample. A total of thirty dealers were contacted of whom twenty-nine provided the necessary information. Of the twenty-nine dealers, nine dealers were in the northern district, sixteen in the central district, and four in the southern district.

The sampling procedure used was a judgement sample and thus statistical inferences cannot be made from any of the data. The results, however, do provide new and very useful insights into the markets and the channels of distribution for North Carolina's fresh iced seafood.

Coastal Fishing Districts Defined

The research findings are presented in terms of state totals and in terms of the three National Marine Fisheries Service (NMFS) reporting districts (see Figure 1-1). The three NMFS reporting districts include the following counties:

Northern District	Central District	Southern District
Beaufort	Carteret	Brunswick
Bertie	Craven	New Hanover
Chowan	Pamlico	Onslow
Currituck		Pender
Dare		
Hyde		
Martin		
Pasquotank		
Tyrrell		
Washington		

Listed to the left of the map are the names of the principal seafood landing points in each district. Seafood products are transported from these landing points to the larger dealers who then move them into the in-state and out-of-state markets. In many cases the seafood moves directly to the markets with dealers serving as brokers or drop shippers. There are numerous other smaller landing points, some without names, which also provide supplies, but individually they handle such small quantities of seafood that their inclusion in this list was not warranted.

Northern District

1. Rockyhock
2. Colerain
3. Wanchese
4. Stumpy Point
5. Washington
6. Belhaven
7. Engelhard
8. Swanquarter
9. South Creek

Central District

10. Lowland
11. Hobucken
12. Vandemere
13. Bayboro
14. Oriental
15. Atlantic
16. Sealevel
17. Davis
18. Beaufort-Morehead City
19. Harkers Island

Southern District

20. Sneads Ferry
21. Wilmington
22. Wrightsville Beach
23. Carolina Beach
24. Shallotte
25. Southport
26. Holdens Beach

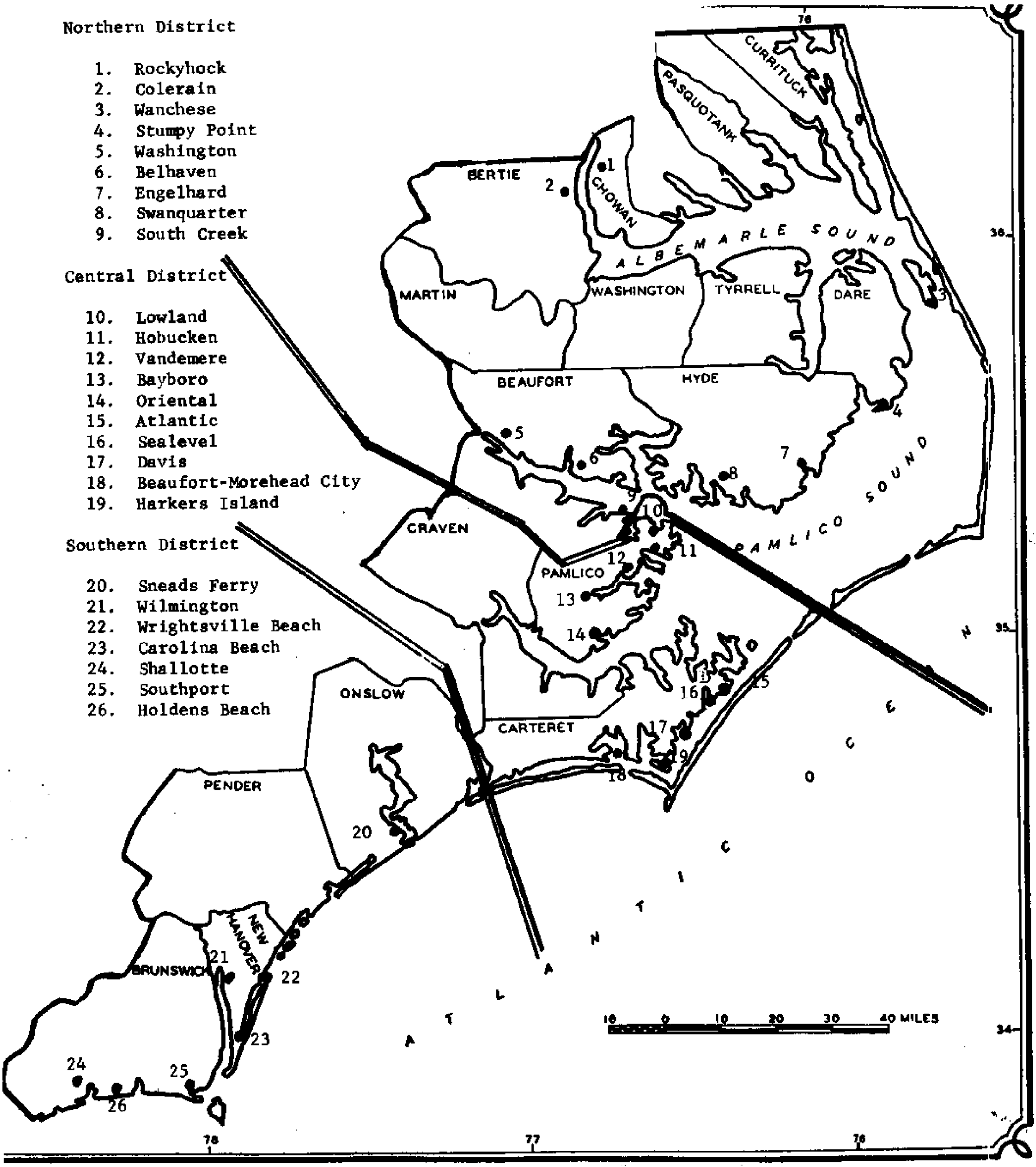

Figure 2-1

Landings Data Compared to NMFS Data

To evaluate the extent to which the data collected are representative of the flow of seafood from the coastal area, the data collected are compared to the quantities reported to the NMFS (see Table 1-1). In all cases, except for shrimp, the quantities reported to the researcher equaled 80 percent or more of the NMFS figures. In the case of gray trout and bluefish, the quantities reported greatly exceed NMFS figures.

The dealers contacted in this study represented a judgement sample of the larger dealers in each district. It was believed that these dealers activities would typify the patterns of movement of the majority of the fresh iced seafood moving off the North Carolina coast. These beliefs are substantially verified by the significant proportion of the official National Marine Fisheries Service (NMFS) reports that the data includes.

In some cases the data collected exceeds the official reported landings. This result may be a product of one or both of the following phenomena. First, the reports to the NMFS are voluntary. As a result, numerous dealers do not make the monthly reports as requested. The non-reporting dealers include numerous small operators and some of the large dealers. Second, there may be some minor double counting in the data as sales between the dealers surveyed were included in the totals. The double counting phenomena had its greatest impact in the southern district. What happens in that district is that there is insufficient product landed in the southern district to meet the demand that the dealers are attempting to serve. As a result, most of their supplies are purchased outside the southern district. The information in Table 1-1 uses only data for seafood landed in North Carolina or purchased from North Carolina Dealers.

One comment which this author frequently heard from many different sources was that the NMFS data tended to understate the actual extent of the seafood landings. If that phenomena was a reality, it would also contribute to the differences reported here.

Table 2-1

National Marine Fisheries Service Data

Compared to Survey Results

(in thousands of pounds)

	Flounder		Gray Trout		Croaker		Spot	
	NMFS	Dealers	NMFS	Dealers	NMFS	Dealers	NMFS	Dealers
Northern District	5,078	5,168	1,400	2,687	1,524	1,222	513	------
Central District	6,592	9,151	4,583	1,262	4,491	4,079	4,676	3,524
Southern District	143	2,076	71	612	57	1,017	418	1,593
Total	11,813	16,395	6,054	10,561	6,072	6,318	5,607	5,117

	Bluefish		Mullet		Shrimp*	
	NMFS	Dealers	NMFS	Dealers	NMFS	Dealers
Northern District	873	1,582	578	527	862	610
Central District	1,542	442	896	642	3,277	4,961
Southern District	15	30	664	602	935	847
Total	2,430	2,054	2,138	1,771	5,074	6,418

* Shrimp are reported based on heads-on weight.

Quantities of Each Species Landed and Handled

The total pounds of each of the study species handled by the coastal dealers contacted are reported in Table 1-2. That table divides the total product into "landed" and "handled" categories. The landed category includes that product landed by the dealers' own boats and/or purchased from independent fishermen. The category for product handled includes that product landed plus product purchased from other seafood dealers.

Flounder

In 1974, almost 11 million pounds of flounder were landed by the dealers contacted in this survey. During that same year, those dealers handled 16.4 million pounds of North Carolina flounder. The difference of 5.4 million pounds represented purchases from other North Carolina seafood dealers/wholesalers. The total sales of flounder were 21.6 million pounds of which 5.2 million pounds were acquired from out-of-state sources.

In terms of product landed at or by the dealers, the northern and central districts with 47.6 and 51.9 percent of the total were the two most important areas. The southern district dealers indicated that they landed only a nominal amount of flounder in 1974.

In terms of the total North Carolina product handled, however, the southern district dealers increased in importance to 12.7 percent of the total. The central district was still the major force in the market though with 55.8 percent of the total. Since the northern district dealers depended mostly on products landed at the dealers and did little outside purchasing, they had a lower percentage (31.5 percent) in terms of the total North Carolina product handled.

When out-of-state purchases are considered in the totals, the southern district moved ahead of the northern dealers in the total volume handled. The central district was still the major handler with 46.7 percent but the southern district moved into second place with 29.3 percent of the total. The northern district though, with 24 percent, was still a major force in the flounder market.

These results indicate that the northern district purchased very little product either in-state or out-of-state and, therefore, appears to have had adequate supplies to satisfy their existing demand. The central district, in contrast, purchased around 900,000 pounds out-of-state while the southern district purchased about 4.2 million pounds out-of-state. The northern district had a very small North Carolina market so most of their product was shipped north. The central and

Table 2-2

Pounds of Study Species Landed and Total Handled

in 1974 by N. C. Coastal Dealers Contacted

		Landed[1] (1000 lbs)	% of State Total	Total N.C. Handled[2] (1000 lbs)	% of State Total	Total Handled All Sources (1000 lbs)	% of State Total
Flounder	Northern District	5166	47.6	5168	31.5	5168	24
	Central District	5636	51.9	9151	55.8	10,073	46.7
	Southern District	50	.005	2076	12.7	6314	29.3
	State Total (1000 lbs)	10,852	100	16,395	100	21,555	100
Gray Trout	Northern District	2686	67.7	2687	32.6	2688	26.9
	Central District	1262	31.8	4949	60	6387	64.0
	Southern District	19	.005	612	7.4	902	9.0
	State Total (1000 lbs)	3967	100	8248	100	9977	100
Croaker	Northern District	1221	37.8	1222	19.3	1223	13.0
	Central District	1985	61.5	4078	64.6	4360	46.5
	Southern District	24	0.74	1017	16.1	3777	40.3
	State Total (1000 lbs)	3230	100	6317	100	9360	100

Footnotes:

[1]"Landed" refers to product purchased directly from fishermen or landed by the dealers own fleet.

[2]"Handled" refers to the combination of product purchased from fishermen, landed by the dealers fleet, and purchased from other dealers such as fishhouses or wholesalers.

		Landed (1000 lbs)	% of State Total	Total N.C. Handled (1000 lbs)	% of State Total	Total Handled All Sources (1000 lbs)	% of State Total
Spot	Northern District	622	15.6	623	10.8	624	10.1
	Central District	3294	82.7	3524	61.4	3559	57.6
	Southern District	69	1.7	1593	27.8	1993	32.2
	State Total (1000 lbs)	3985	100	5741	100	6175	100
Bluefish	Northern District	1581	78.5	1582	77.1	1582	76.8
	Central District	427	21.2	442	21.5	442	21.4
	Southern District	6	.3	30	1.5	36	1.7
	State Total (1000 lbs)	2012	100	2053	100	2059	100
Mullet	Northern District	527	45.5	527	29.8	527	25.2
	Central District	548	47.32	642	36.2	642	30.8
	Southern District	83	1.2	602	34	914	43.9
	State Total (1000 lbs)	1158	100	1771	100	2084	100
Shrimp	Northern District	353	15.2	366	9.5	373	9.3
	Central District	1845	79.4	2977	77.3	3052	76.5
	Southern District	125	5.4	508	13.2	563	14.1
	State Total (1000 lbs)	2323	100	3851	100	3988	100

particularly the southern districts had good year-round local and in-state markets and, therefore, were required to make extensive out-of-state purchases when flounder was out of season in North Carolina.

Gray Trout

A total of about 3.9 million pounds of gray trout were landed, 8.2 million pounds of North Carolina product handled, and about 10 million pounds from all sources sold by the dealers contacted in this study. In terms of product landed, the northern district was most important with 2.69 million pounds or 67.7 percent of the total. The central district was second with 1.26 million pounds or 31.8 percent of the total.

The percentages shifted, however, when total North Carolina pounds handled were considered. The central district increased its poundage to 4.95 million or 60 percent of the state totals when purchases from other dealers were considered, while the northern district remained unchanged. The southern dealers handled 32 times as much North Carolina gray trout as they landed for a total of 612,000 pounds or 7.4 percent of the state total. The consideration of out-of-state purchases of product placed the central district at 64 percent of state totals with 6.38 million pounds, the northern district at 26.4 percent with 2.69 million pounds, and the southern district at 9 percent with 902,000 pounds.

Croaker

The landings of croaker by the dealers contacted totaled 3.2 million pounds, while 6.31 million pounds of North Carolina product were handled when purchases from other dealers were considered. Out-of-state purchases raised the total sales to 9.36 million pounds.

The central district with 1.98 million pounds had the largest landings followed by the northern district's 1.22 million pounds. The southern district dealers landed only 24,000 pounds. The total North Carolina product handled remained almost the same in the north with 1.22 million pounds or 19.3 percent of the total. The central district increased to 4.07 million pounds or 64.6 percent of the total and the southern district handled 947,000 pounds for 14.3 percent.

Out-of-state purchases of croaker were concentrated in the southern district. These dealers purchased 2,760,000 pounds of out-of-state croaker. Those purchases put the southern district in second place in total croaker handled from all sources with 40.3 percent of the total.

The central district in contrast purchased only 282,000 pounds of out-of-state croaker. Those dealers handled 4.36 million pounds of croaker representing 46.5 percent of the states sales of croaker. The northern district made very few out-of-state purchases and so their percentage of the total handled from all sources declined to 13.0 percent.

Spot

The largest landings of spot were in the central district. These dealers landed 3.29 million pounds for 82.7 percent of the total landings. The northern district followed with 622,000 pounds or 15.6 percent, and the southern district dealers had 69,000 pounds for 1.7 percent.

The central district also led on total North Carolina product handled with 3.52 million pounds for 61.4 percent. The big increase came in the southern district with 1.59 million pounds for 27.8 percent of the total North Carolina product handled. That increase resulted from purchases made from other North Carolina fish houses/dealers.

The inclusion of out-of-state purchases impacts importantly on only the southern district. The purchase of 400,000 pounds out-of-state shifts the poundages and percentages of the total handled to 1.99 million pounds for 32.2 percent in the southern district; 3,560 million pounds for 57.6 percent in the central district; and 624,000 pounds for 10.1 percent in the northern district.

Bluefish

Bluefish was predominantly landed by the dealers in the northern district. That district accounted for 78.5 percent of the landings for a total of 1.58 million pounds. The central district dealers landed 427,000 pounds for 21.2 percent while the southern dealers landed only 6,000 pounds.

Bluefish was not a popular fish with the dealers. It spoils easily and frequently requires evisceration before shipping to customers. As a result dealers indicated that they typically handled as few bluefish as possible. The central and southern districts brought a few bluefish in from out-of-state but not many. The central district dealers purchased 15,000 pounds from other dealers and the southern dealers bought 24,000 pounds. Only 6,000 pounds were purchased out-of-state and that was by southern dealers.

Mullet

The largest landings of mullet, by a slight majority, were by dealers in the central district. Landings there totaled 548,000 pounds for 47.3 percent. The northern dealers were a close second with 527,000 pounds for 45.5 percent. The southern dealers landed only 83,000 pounds for 7.2 percent of the landings by the dealers contacted.

The purchase of mullet from other North Carolina dealers increased the central district totals to 642,000 pounds for 36.2 percent of the total handled. The percentage of the total dropped for the central district because the southern district increased from 83,000 pounds landed to 602,000 pounds handled when purchases from other North Carolina dealers were included. The latter figure represented 34 percent of the total handled by all districts.

The southern district dealers were the only ones importing mullet from out-of-state. They brought in 313,000 pounds making them the largest dealers in mullet. The total product identified amounted to 2.08 million pounds with the southern district accounting for 43.9 percent of the states sales. The central district had 30.8 percent and the northern district 25.2 percent of the total product handled when all sources were combined.

Shrimp

The total pounds of shrimp landings accounted for in this study amounted to 2.3 million pounds. Of this total, 79.4 percent or 1.8 million pounds were landed in the central district. The north was second with 353,000 pounds for 15.2 percent and the south trailed with 125,000 pounds for only 5.4 percent.

Neither the northern nor the central district dealers purchased significant quantities of shrimp from other dealers. The southern district, however, purchased 383,000 pounds of shrimp from other North Carolina dealers and brought in another 57,000 pounds from out-of-state.

The central district remained the dominant district in total product handled with 3.05 million pounds for 76.5 percent of the total. The southern district was second with 563,000 pounds for 14.1 percent and the north had 373,000 for 9.3 percent.

Summary

The data in Table 1-2 indicate that the northern district dealers depended almost exclusively on their own fleets as the source of the seafood products they handled. The central district dealers handled more of each species than they landed. These dealers--more so than the northern district dealers--were less dependent on their own fleets to supply them with the product. The larger dealers in this area, in fact, indicated that they preferred not to operate their own fleets. They indicated that they found dealing with independent fishermen a more satisfactory arrangement in terms of both their own finances and the performance incentives for the fisherman.

The dealers in the southern district handled far more of each species than they landed. Like the central district dealers, they indicated that they preferred to deal with independent fishermen for their supplies. Unlike the central district, however, there were not many independent fishermen to provide these supplies. As a result these dealers were dependent on other dealers both in and outside of North Carolina to provide them with the seafood they needed to meet demand. More information on in-state and out-of-state markets is presented in the next two sections of this report.

In-State Sources of Supplies

The data for sources of supply broken down by districts appear in Table 1-3. Those data point up some fundamental differences in the nature of the dealers' activities in each district.

In the northern district the product came primarily from two sources--private fishermen operating their own, or dealer-owned boats. Very little product was purchased out-of-state or transferred between in-state dealers. Each dealer shipped his own product to whatever market he served. Two dealers may have shipped on the same truck with one paying a transportation charge to the other, but each retained title to his own product. This pattern was fairly consistent for all species included in this study.

The central district had a mixed pattern in terms of the sources used by dealers, (see Table 1-4). For flounder, the order of importance was fish houses/wholesalers and dealers' fleets. Only 9.2 percent of the flounder was purchased from out-of-state.

For gray trout, the central district sources were more concentrated. Almost 58 percent of the product was purchased from fish houses/wholesalers, and 22.5 percent was brought in from out-of-state. The fishermen provided 12.6 percent and the dealers 7.2 percent of the product handled. The gray trout's out-of-state sources of product played an important role in the central district.

The principle source of croaker in the central district was the fish-house/wholesaler. That source provided 48 percent of the supply followed by fishermen and dealers' fleets with 23.9 percent and 21.7 percent respectively. Spot, bluefish, and mullet were overwhelmingly dominated by the private fishermen with 68.5 percent for spot, 67.4 percent for bluefish, and 66.8 percent for mullet. Dealers' fleets were second in importance for all three species.

The majority of the shrimp, 39.5 percent, in the central district was provided by the fish-house/wholesaler. Fishermen were a close second with 38 percent followed by dealers' fleets with 22.4 percent.

The southern district did not land many fish, (see Table 1-5). There were no fleets maintained by any of the dealers contacted and, with the exception of shrimp, very small percentages of the supply were landed by the fishermen. Other North Carolina fish-houses/wholesalers provided most of the product except in the case of flounder and croaker. In the latter two cases, out-of-state producers provided needed supplies.

Discussions with dealers in the southern district confirmed that very little if any of the study species was landed there. Most of these dealers depended on either out-of-state suppliers or fish-houses/wholesalers located in the central district for the product they needed for serving their customers.

Table 2-3

Sources of Supply for N. C.
Coastal Dealers in 1974

NORTHERN DISTRICT

	Private Fishermen		Dealers' Fleet		Fishhouses or Wholesalers		Out-of-State Purchases		District Total
	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs.
Flounder	2360	45.7	2807	54.3	0.750	0.014	0.375	0.007	5168
Gray Trout	1785	66.4	900	33.5	1.3	0.05	1.3	0.05	2688
Croaker	885	72.4	336	27.5	1.0	0.08	1.0	.08	1223
Spot	586	93.9	36	5.8	1.0	0.16	1.0	0.16	624
Bluefish	1379	87.2	202	12.8	0.375	0.02	0.375	0.02	1582
Mullet	527	100	----	----	----	----	----	----	527
Shrimp	300	80.4	52	14.1	21	5.5	----	----	373

Table 2-4

Sources of Supply for N. C.
Coastal Dealers in 1974

CENTRAL DISTRICT

	Private Fishermen		Dealers' Fleet		Fishhouses or Wholesalers		Out-of-State Purchases		District Total
	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs	% of District Total	1000 lbs.
Flounder	3038	30.2	2598	25.8	3515	34.0	922	9.2	10,073
Gray Trout	802	12.6	461	7.2	3686	57.7	1438	22.5	6787
Croaker	1041	23.9	945	21.7	2093	48.0	282	6.47	4361
Spot	2436	68.5	858	24.1	230	6.5	34	1.0	3558
Bluefish	298	67.4	129	29.2	15	3.4	----	----	442
Mullet	429	66.8	119	18.6	94	14.6	----	----	642
Shrimp	1611	38.0	684	22.4	1207	39.5	----	----	3052

Table 2-5

Sources of Supply for N. C.
Coastal Dealers in 1974

SOUTHERN DISTRICT

	Private Fishermen		Dealers' Fleet		Fishhouses or Wholesalers		Out-of-State Purchases		District Total
	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs.	% of District Total	1000 lbs.
Flounder	50	0.8	----	----	2026	32.1	4237	67.1	6314
Gray Trout	19	2.2	----	----	593	65.8	289	32	901
Croaker	24	0.7	----	----	993	26.3	2760	73	3777
Spot	69	3.5	----	----	1524	76.5	400	20	1993
Bluefish	6	16.0	----	----	24	66.8	6	17.2	36
Mullet	83	9.1	----	519	519	56.7	312	34.2	914
Shrimp	125	22.1	----	----	384	68.1	55	9.8	564

Out-of-State Sources of Supplies

Purchases of out-of-state supplies varied considerably in the three districts. Those patterns, however, were not inconsistent with the patterns of distribution that will be presented in a later section of this report.

The northern district dealers purchased very little out-of-state products, (see Table 1-6). What they did buy out-of-state came from the adjacent area of Virginia. This pattern was consistent with the fact that the northern district markets were principally in the out-of-state areas. There was little economic justification for those dealers, given the markets they were serving, to transport product into North Carolina and then ship it back out. Their operations were principally directed toward selling what they landed.

In the central district, in contrast, there were more out-of-state purchases of supplies (see Table 1-7). The difference developed in part due to the nature of the markets served. The principal influencing factor was one very large dealer who served a variety of different markets both in-state and out-of-state.

The southern district served an expanding in-state market for fresh seafood (see Table 1-8). That market is a year-round market while North Carolina's catch of fresh seafood is influenced by a high degree of seasonality as discussed later. The largest out-of-state purchases were for flounder. The 4.2 million pounds brought in were principally purchased from Massachusetts and Maryland. Alabama, which provided 500,000 pounds, was the only southern source for flounder. Croaker also had a strong out-of-state purchase rate in the southern district. In order to meet market demands, 2.6 million pounds were brought in from Alabama. This species, it might be noted, has a noticeably different flavor when caught in different waters. The Alabama or Gulf Coast croaker has a higher iodine content than the North Carolina croaker and consequently has a somewhat different flavor. It is conceivable that the inland North Carolina consumers could become accustomed to the flavor of the Gulf Coast croaker and subsequently find the North Carolina croaker sufficiently different in flavor that they would not buy it. Other out-of-state sources for the southern district included gray trout from Virginia, Alabama, and Massachusetts, and spot and mullet from Florida. The principle out-of-state source of shrimp was Alabama.

Table 2-6

Supplies Obtained from Out-of-State
Compared to Total Handled in 1974

Northern District

	(1000 lbs)	% of Total Handled	(1000 lbs)	% of Total Handled	(1000 lbs)	% of Total Handled
	FLOUNDER		GRAY TROUT		CROAKER	
N. C.	5168	99.9	2687	99.9	1222	99.9
Va.	.4	.007	1.4	.05	1	.08
Total Handled	5168.4	100%	2688.4	100%	1223	100%
	SPOT		BLUEFISH		MULLET	
N. C.	623	99.8	1582	99.9	527	100
Va.	1	.16	.4	.02	----	----
Total Handled	624	100%	1582.4	100%	527	100%
	SHRIMP					
N. C.	366	98.1				
Va.	7	1.8				
Total Handled	373	100%				

Table 2-7

Supplies Obtained from Out-of-State
Compared to Total Handled in 1974

Central District

	(1000 lbs)	% of Total Handled	% of Out of State	(1000 lbs)	% of Total Handled	% of Out of State	(1000 lbs)	% of Total Handled	% of Out of State
		FLOUNDER			GRAY TROUT			CROAKER	
Total N. C.	9151	90.8	----	4949	77.4	----	4079	93.5	----
Va.	----	----	----	----	----	----	281	6.4	99.6
Miss.	----	----	----	----	----	----	.7	.02	0.4
Mass.	222	2.2	24.1	----	----	----	----	----	----
N. J.	700	6.9	75.9	1438	22.5	100	----	----	----
Total Out of State	922			1438			281.7		
Total Handled	10,073	100%	100%	6387	100%	100%	4360.7	100%	100%
		SPOT			BLUEFISH			MULLET	
Total N. C.	3524	99.0	----	442	----	----	642	----	----
Va.	34	.95	100	----	----	----	----	----	----
Total Out of State	34			----			----		
Total Handled	3558	100%	100%	442	----	----	642	----	----
		SHRIMP							
Total N. C.	2977	97.5	----						
Va.	75	2.5	100						
Total Out of State	75								
Total Handled	3052	100%	100%						

Table 2-8

Supplies Obtained from Out-of-State
Compared to Total Handled in 1974

Southern District

	(1000 lbs)	% of Total Handled	% of Out of State	(1000 lbs)	% of Total Handled	% of Out of State	(1000 lbs)	% of Total Handled	% of Out of State
		FLOUNDER			GRAY TROUT			CROAKER	
Total N. C.	2076	32.9	----	612	67.9	----	1017	26.9	----
Va.	122	1.9	2.9	112	12.4	38.8	200	5.2	7.2
S. C.	----	----	----	----	----	----	----	----	----
Ala.	500	7.9	11.8	101	11.2	35.0	2560	67.6	92.8
Md.	1500	23.8	35.4	----	----	----	----	----	----
N. Y.	40	.6	0.9	.8	.08	0.3	----	----	----
Mass.	2075	32.9	49.0	75	8.3	26.0	----	----	----
Fla.	----	----	----	----	----	----	----	----	----
Total Out of State	4237			288.8			2760		
Total Handled	6313	100%	100%	901.0	100%	100%	3777	100%	100%
		SPOT			BLUEFISH			MULLET	
Total N. C.	1593	79.9	----	30	98.0	----	602	65.8	----
Va.	350	17.5	87.5	.6	1.9	100	62	6.8	19.9
Fla.	50	2.5	12.5	----	----	----	250	27.3	80.1
Total Out of State	400			.6			312		
Total Handled	1993	100%	100%	30.6	100%	100%	914	100%	100%
		SHRIMP							
Total N. C.	508	90.2	----						
S. C.	10	1.7	18.2						
Ala.	35	6.2	63.6						
La.	10	1.7	18.2						
Total Out of State	55								
Total Handled	563	100%	100%						

Impact of Seasonality in the Landings

The seasonality aspect of the North Carolina fisheries resources had an important influence on the extent of out-of-state purchases. The demand for flounder, for example, continues throughout the year. The North Carolina catches, however, are primarily concentrated during the three-month period from November through January. According to National Marine Fisheries Service data, 80 percent of the official North Carolina catch of flounder in 1974 was landed during the November through January period (see Table 1-9).

To deal with the seasonality problem the dealers must purchase the needed supplies from out-of-state sources. A number of the coastal dealers have also installed large freezers so that a small percentage of their landings can be preserved for sale during later periods when supplies are short. That storage capacity, however, is not adequate to hold sufficient product to meet the annual demand that the dealers serve nor does it seem to be intended primarily for that purpose. The freezing capacity, rather than providing a reserve for demand, primarily provides a hedge against crops in price when supplies become plentiful.

High levels of supply tend to drive prices down. When the prices reach a point that the dealer does not believe that it will be profitable to move the product to market, then the decision to freeze is made. Those fish are subsequently held until the prices rise to a level that will pay the dealer his expenses for freezing and a desired level of profit.

The holding of fish in a frozen state is an expensive proposition given current energy costs so the dealers tend to make the decision to freeze as a last resort. A few of the dealers indicated that they occasionally speculated by freezing shrimp or flounder in anticipation of future increases in price when those species are out of season but that did not seem to be a common practice. The practice was uncommon for most dealers due to a lack of sufficient freezing capacity, a reluctance or inability to take the financial risk, and/or the availability of adequate markets during the regular season.

Table 2-9

Seasonality of Catch as Demonstrated in
Monthly North Carolina Landings*
(1000 pounds)

	Flounder		Gray Trout		Croaker		Spot		Bluefish		Mullet		Shrimp	
Month	1973	1974	1973	1974	1973	1974	1973	1974	1973	1974	1973	1974	1973	1974
Jan.	2,335	2,811	1,624	2,071	363	607	119	----	424	83	49	49	0	0
Feb.	214	390	1,587	1,678	506	225	146	----	295	290	27	30	0	17
Mar.	221	154	971	799	255	437	54	11	333	94	11	28	0	8
Apr.	147	236	778	164	173	231	38	17	317	68	4	26	0	76
May	37	35	37	61	281	729	135	90	28	68	14	11	250	514
June	37	47	37	73	350	486	259	196	26	118	25	26	760	784
July	44	35	156	91	960	607	567	280	100	162	43	45	961	1,433
Aug.	74	142	205	127	545	959	475	432	112	341	80	111	941	4,163
Sep.	96	224	162	176	385	668	810	1,716	64	188	178	472	951	708
Oct.	435	673	143	279	173	267	2,035	2,321	179	513	318	928	745	556
Nov.	2,143	2,634	162	242	199	516	723	465	64	129	262	288	355	135
Dec.	1,554	4,359	336	260	112	188	5	62	58	120	24	111	20	----

*Based on data provided in T.M. Miller, N.B. Webb, F.B. Thomas, and J.E. Easley, Jr., Seafood Processing and Marketing in The Coastal Plains Area, Sea Grant Publication UNC-SG-75-24, July 1975, pp 7-28.

Chapter 3

DISTRIBUTION PATTERNS FOR THE SEVEN SPECIES STUDIED

This chapter presents information on the patterns of distribution for each of the seven species studied. The information is derived from data broken down in terms of each of the three districts as well as state totals for the combined districts. Data on in-state sales are presented in terms of two geographic areas. The Piedmont area emcompasses sales to markets west of U.S. Highway 301. The area east of and including the towns through which that highway passes was considered to be in the coastal area.

The out-of-state sales are examined in terms of the markets served. There markets are defined for this discussion as those states receiving shipments of the seven fresh iced seafood products studied.

Distribution Patterns for Flounder

In-State Sales

The overall state statistics shown in Table 3-1 indicate that 55 percent of the fresh iced flounder handled by North Carolina coastal dealers in 1974 moved into the in-state fresh seafood wholesale and retail markets. Of the 55 percent, 45.6 percent of the total catch was sold in the coastal area and the balance, 9.4 percent, moved inland to Piedmont area fresh fish wholesalers and retailers, considering only the flounder sold in North Carolina, the majority (82.6 percent) stayed in the coastal area and the balance of 17.4 percent was sold to inland dealers.

In-state sales of flounder are further analyzed in Table 3-2. From the data in that table it is evident that the central district was the largest supplier of flounder to the coastal area. The southern district was second with 12.8 percent followed by the northern district's 2.7 percent.

Shipments to the inland North Carolina markets were dominated by the southern district. Those dealers shipped 76.8 percent of the flounder moving into inland North Carolina markets in 1974. The central district was the second largest shipper, with 19.2 percent of the inland volume, followed by the northern district with 4.0 percent.

In terms of all in-state sales the central district supplied 73.4 percent of the fresh flounder sold in North Carolina. The southern district was second with 23.7 percent followed by the northern district's 2.9 percent.

Out-of-State Sales

Out-of-state shipments of flounder moved to a variety of states. Table 3-1 illustrates those sales patterns by both the state totals and the district totals. South Carolina with 22.8 percent of the total, was the largest customer. Virginia was second with 9.6 percent followed by New York with 5.5 percent of all sales of fresh iced seafood.

The northern district was the largest shipper of flounder for out-of-state sales. That district handled 45.5 percent of all flounder shipped out-of-state. The southern district was the second largest out-of-state shipper with 30.5 percent followed by the central district with 24.0 percent.

The out-of-state sales for each of the three districts are broken down in terms of their principal markets in Table 3-3. The northern districts's principal customers were South Carolina with 42.1 percent of their out-of-state sales, Virginia with 29.2 percent of out-of-state sales, and New York with 19 percent of out-of-state sales. The southern district, the second largest out-of-state shipper, sent 97.1 percent of its out-of-state shipments to South Carolina.

The central district shipments moved to Virginia with 31.8 percent, Maryland with 20.5 percent, and New York with 14.9 percent.

The state receiving the largest amount of North Carolina fresh iced flounder was South Carolina. That state received 50.7 percent of all out-of-state shipments in 1974 or over twice as much flounder as Virginia's 21.5 percent of the out-of-state sales.

Table 3-1

Distribution of Flounder in 1974

	Northern District		Central District		Southern District		State Totals	
	Total	%	Total	%	Total	%	Total	%
N. C.								
Coastal	291,760	5.6	9,099,100	75.4	1,376,006	21.8	10,766,966	45.6
Piedmont	89,093	1.7	426,000	3.5	1,700,000	27.0	2,215,093	9.4
Sub Total	380,853	7.3	9,525,100	78.9	3,076,006	48.8	12,982,059	55.0
Out of State								
Va.	1,403,823	27.0	808,500	6.7	60,000	.95	2,272,323	9.6
Md.	278,877	5.4	522,000	4.3	-----	----	800,877	3.3
Penn.	13,350	.2	181,000	1.5	18,852	.3	213,202	.9
N. Y.	915,280	17.6	377,500	3.1	13,466	.2	1,306,246	5.5
S. C.	2,027,555	39.0	200,000	1.6	3,135,000	49.7	5,362,555	22.8
Ga.	-----	----	96,000	.8	-----	----	96,000	.4
Fla.	54,715	1.05	232,000	1.9	-----	----	286,715	1.2
Ala.	-----	----	32,000	.3	-----	----	32,000	.1
La.	-----	----	32,000	.3	-----	----	32,000	.1
N. J.	117,450	2.3	60,000	.5	-----	----	177,450	.7
Misc.	919	.02	-----	----	-----	----	919	.003
Sub Total	4,811,969	92.6	2,541,000	21.1	3,227,318	51.1	10,580,287	44.6
Totals	5,192,822	100	12,066,100	100	6,303,324	100	23,562,346	

Table 3-2

FLOUNDER

Percentage of 1974 In-State and Out-of-State Sales by District

	Northern		Central		Southern		State Total	
	Pounds	%	Pounds	%	Pounds	%	Pounds	%
In-State								
Coastal	291,760	2.7	9,099,100	84.5	1,376,006	12.8	10,766,966	100
Piedmont	89,093	4.0	426,000	19.2	1,700,000	76.8	2,215,093	100
Sub Total	380,853	2.9	9,525,100	73.4	3,076,006	23.7	12,982,059	100
Out-of-State	4,811,969	45.5	2,541,000	24.0	3,227,318	30.5	10,580,287	100
Total	5,192,822		12,066,100		6,303,324		23,562,346	

Table 3-3

FLOUNDER

Percentage of 1974 Out-of-State Sales to

Principal Markets for Each District

	Northern			Central			Southern			Totals		
	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales
Principal Markets												
South Carolina	2,027,555	42.1	39.0	------	----	----	3,135,000	97.1	49.7	5,362,555	50.7	22.8
Virginia	1,403,823	29.2	27.0	808,500	31.8	6.7	------	----	----	2,272,323	21.5	9.6
New York	915,280	19.0	17.6	377,500	14.9	3.1	------	----	----	1,306,246	12.3	5.5
Maryland	------	----	----	522,000	20.5	4.3	------	----	----	800,877	7.6	3.4
Sub Total	4,346,658			1,708,000			3,135,000			9,742,001		
All Other States	465,311	9.7	9.0	833,000	32.8	6.9	92,318	2.9	1.5	838,286	7.9	3.5
Total	4,811,969	100	92.6	2,541,000	100	21.0	3,227,318	100	51.2	10,580,287	100	44.8
Grand Total*	5,192,822		100	12,066,100		100	6,303,324		100	23,562,346		100

* Includes in-state as well as out-of-state sales.

Distribution Patterns for Gray Trout

In-State Sales

Data on state totals and district totals for sales of gray trout appear in Table 3-4. Of the fresh iced gray trout handled by North Carolina coastal dealers in 1974, 80.4 percent was sold inside North Carolina. This represented a total volume of 7,319,493 pounds moving into the state. Of that total amount the majority (94.2 percent) was sold in the coastal areas of the state and the balance of 5.8 percent moved to inland areas of the state.

The data in Table 3-5 indicate that the central district dealers were the largest suppliers of gray trout to the coastal area. They supplied 84.1 percent of that species to the coastal area. The northern and southern districts followed with 13.4 and 2.5 percent respectively.

The inland market was served primarily by the northern district. That district provided 63.9 percent of the inland area shipments. They were followed by the southern district's 26.4 percent and the central district's 9.7 percent.

Out-of-State Sales

Data on all states receiving shipments of North Carolina gray trout appear in Table 3-4. These data cover each district's totals and include state totals. The largest out-of-state customer for gray trout was New York. That state received 7.5 percent of the total handled. In a close second place was Virginia with 6.0 percent. Maryland was third with 3.4 percent. The largest out-of-state shipper of gray trout was the northern district. These dealers shipped 82.8 percent of that species that moved out-of-state (see Table 3-5).

Sales by districts to their principal markets are highlighted in Table 3-6. The northern district's largest out-of-state market was New York. That state received 44.7 percent of the out-of-state sales of the northern district's dealers. Virginia was second with 31.1 percent followed by Maryland with 19.3 percent.

The central district had two principal customers, Virginia and Pennsylvania. These districts received 32.8 and 31.0 percent respectively of this district's out-of-state sales.

The southern district sold their gray trout primarily to South Carolina. That state received 76.1 percent of this district's out-of-state sales. Virginia was also a customer of the southern district receiving 23.9 percent of its out-of-state sales.

The central district shipped primarily to Pennsylvania. That state received 43.2 percent of the out-of-state sales of croaker by those dealers. Maryland was second with 22.5 percent followed by South Carolina with 17.0 percent.

The southern district shipped 96.8 percent of their croaker to South Carolina. This figure represented 1,944,000 pounds of fresh iced croaker.

Table 3-4

Distribution of Gray Trout in 1974

	Northern District		Central District		Southern District		State Totals	
	Total	%	Total	%	Total	%	Total	%
N. C.								
Coastal	923,005	34.6	5,794,150	95.4	174,545	49.2	6,891,700	75.7
Piedmont	273,543	10.2	41,250	.68	113,000	31.9	427,793	4.7
Sub Total	1,196,548	44.8	5,835,400	96.0	287,545	81.1	7,319,493	80.4
Out of State								
Va.	458,583	17.2	78,500	1.3	16,000	4.5	553,083	6.0
Md.	284,111	10.6	27,650	.45	-----	----	311,761	3.4
Penn.	1,733	.06	74,250	1.2	-----	----	75,983	.8
N. Y.	657,871	24.6	27,000	.44	-----	----	684,871	7.5
S. C.	59,655	2.2	28,750	.47	51,000	14.4	139,405	1.5
Ga.	-----	----	600	.099	-----	----	600	.006
Fla.	------	----	1,000	.016	-----	----	1,000	.01
Ala.	-----	----	800	.013	-----	----	800	.008
La.	-----	----	800	.013	-----	----	800	.008
N. J.	8,460	.31	-----	----	-----	----	8,460	.09
Misc.	1,989	.07	-----	----	-----	----	1,989	.02
Sub Total	1,472,402	55.0	239,350	4.0	67,000	18.9	1,778,752	19.3
Totals	2,668,950	100	6,074,750	100	354,545	100	9,098,245	100

Table 3-5

GRAY TROUT

Percentage of 1974 In-State and Out-of-State Sales by District

	Northern		Central		Southern		State Total	
	Pounds	%	Pounds	%	Pounds	%	Pounds	%
In-State								
Coastal	923,005	13.4	5,794,150	84.1	174,545	2.5	6,891,700	100
Piedmont	273,543	63.9	41,250	9.7	113,000	26.4	427,793	
Sub Total	1,196,548	16.4	5,835,400	79.7	287,545	3.9	7,319,493	
Out-of-State	1,472,402	82.8	239,350	13.4	67,000	3.8	1,778,752	
Total	2,668,950		6,074,250		354,545		9,098,245	

Table 3-6

GRAY TROUT

Percentage of 1974 Out-of-State Sales to

Prinicpal Markets for Each District

	Northern			Central			Southern			Totals		
	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales
Out-of-State												
South Carolina	-----	----	----	-----	----	----	51,000	76.1	14.4	139,405	7.8	1.5
Virginia	458,583	31.1	17.2	78,500	32.8	1.3	16,000	23.9	4.5	553,083	31.1	6.0
Pennsylvania	1,733	0.1	----	74,250	31.0	1.2	-----	----	----	75,983	4.3	0.8
New York	657,871	44.7	24.6	-----	----	----	-----	----	----	684,871	38.5	7.5
Maryland	281,111	19.3	10.6	-----	----	----	-----	----	----	311,761	17.5	3.4
Sub Total	1,400,565			152,750			67,000			1,765,103		
Other States	-- 71,837	4.9	2.7	86,600	36.2	1.4	-----	----	----	13,649	0.8	0.1
Total	1,472,402	100	55.1	239,350	100	3.9	67,000	100	18.9	1,778,752	100	19.3
Grand Total*	2,668,950			6,074,750			354,545			9,098,245		

*Includes in-state as well as out-of-state sales.

Distribution Patterns for Croaker

In-State Sales

The data shown in Table 3-7 indicate that 52 percent of the fresh iced croaker handled by the coastal dealers in 1974 moved into markets inside North Carolina. That 52 percent figure breaks down into 40.1 percent being sold in the coastal area and the balance of 11.9 percent moving into the rest of the state. If the North Carolina sales are viewed independently of the out-of-state sales, then the 40.1 percent figure converts to tell us that 77 percent of the fresh iced croaker sales to North Carolina markets were made to coastal area purchasers. The remaining 23 percent moved into other areas of the state.

Table 3-8 further analyzes the in-state data. These data indicate that the central district was the largest supplier of croaker to the coastal area markets. These dealers provided 69.7 percent of the coastal needs. The southern district supplied 25.7 percent followed by the northern district's 4.6 percent.

The inland North Carolina markets were served primarily by the southern dealers. They provided 93.7 percent of the inland requirements for croaker. The central district was second with 4.4 percent and the northern district supplied only 1.9 percent.

Out-of-State Sales

Out-of-state sales represented 47.6 percent of the fresh iced croaker handled in 1974 (see Table 3-7). The southern district was the largest supplier to those markets, having handled 47 percent of out-of-state shipments (see Table 3-8). The largest customer was South Carolina. That state received 24.4 percent of all croaker handled, an amount that represented 51.1 percent of all out-of-state sales (see Table 3-9).

The second largest customer for croaker was Pennsylvania which purchased 13.6 percent of the out-of-state sales. The other important customers included Virginia with 13.0 percent, Maryland with 10.9, and New York with 10.5 percent of out-of-state sales.

Table 3-9 illustrates the sales of croaker by districts. The northern district sold primarily to Virginia and New York. These states received 37.8 percent and 35.0 percent respectively of the out-of-state shipments from that district. Maryland received 18.5 percent with the balance spread out over a variety of states as indicated in Table 3-7.

Table 3-7

Distribution of Croaker in 1974

	Northern District		Central District		Southern District		State Totals	
	Total	%	Total	%	Total	%	Total	%
N. C.								
Coastal	164,865	13.5	2,495,200	66.2	918,931	23.4	3,578,996	40.1
Piedmont	20,058	1.6	47,500	1.2	1,000,000	25.5	1,067,558	11.9
Sub Total	184,923	15.1	2,542,700	67.4	1,918,931	48.9	4,646,554	52.0
Out of State								
Va.	392,321	32.1	98,250	2.6	64,000	1.6	554,571	6.2
Md.	192,402	15.7	276,500	7.3	-----	----	468,902	5.2
Penn.	51,333	4.2	531,100	14.0	-----	----	582,433	6.5
N. Y.	363,154	29.6	83,600	2.2	-----	----	446,754	5.0
S. C.	30,345	2.5	209,000	5.5	1,944,000	49.5	2,183,345	24.4
Ga.	-----	----	12,000	.3	-----	----	12,000	.1
Fla.	-----	----	10,000	.26	-----	----	10,000	.1
Ala.	-----	----	4,000	.1	-----	----	4,000	.04
La.	-----	----	4,000	.1	-----	----	4,000	.04
N. J.	7,490	.61	-----	----	-----	----	7,490	.08
Misc.	1,012	.08	-----	----	-----	----	1,012	.01
Sub Total	1,038,057	84.8	1,228,450	32.3	2,008,000	51.1	4,274,507	47.6
Totals	1,222,980	100	3,771,150	100	3,926,931	100	8,921,061	100

Table 3-8

CROAKER

Percentage of 1974 In-State and Out-of-State Sales by District

	Northern		Central		Southern		State Total	
	Pounds	%	Pounds	%	Pounds	%	Pounds	%
In-State								
Coastal	164,865	4.6	2,495,200	69.7	918,931	25.7	3,578,996	100
Piedmont	20,058	1.9	47,500	4.4	1,000,000	93.7	1,067,558	100
Sub Total	184,923	4.0	2,542,700	54.7	1,918,931	41.3	4,646,554	100
Out-of-State	1,038,027	24.3	1,228,450	28.7	2,008,000	47.0	4,274,507	100
Total	1,222,980		3,771,150		3,926,931		8,921,061	

Table 3-9

CROAKER

Percentage of 1974 Out-of-State Sales to

Principal Markets for Each District

	Northern			Central			Southern			Totals		
	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales
Out-of-State												
South Carolina	------	----	----	209,000	17.0	5.5	1,944,000	96.8	96.8	2,183,345	51.1	24.4
Virginia	392,321	37.8	32.1	------	----	----	-------	----	----	554,571	13.0	6.2
New York	363,154	35.0	29.6	------	----	----	------	----	----	446,754	10.5	5.0
Maryland	192,402	18.5	15.7	276,500	22.5	7.3	------	----	----	468,902	10.9	5.2
Pennsylvania	------	----	----	531,100	43.2	14.0	------	----	----	582,433	13.6	6.5
Sub Total	947,877			1,016,600			1,944,000			4,236,005		
Other States	90,180	8.7	7.4	211,850	17.3	5.6	64,000	3.2	1.6	38,502	0.9	0.4
Total	1,038,057	100	84.8	1,228,450	100	32.4	2,008,000	100	98.4	4,274,507	100	47.7
Grand Total	1,222,980			3,771,150			3,926,931			8,921,061		

Distribution Patterns for Spot

In-State Sales

Data on distribution patterns for fresh iced spot appear in Table 3-10. These data indicate that 60.5 percent of the spot handled by North Carolina coastal dealers in 1974 was distributed inside North Carolina. The coastal area received 51.4 percent of the 60.5 percent handled or 85 percent of the amount distributed in-state, the inland areas received the remaining 9.1 percent handled 15 percent of the amount drstributed in North Carolina.

The data in Table 3-11 indicate that the central district dealers were the largest suppliers of spot to the coastal area. They supplied 72.1 percent of the coastal area sales. The southern district provided 23.9 percent and the northern district 4.0 percent of the total.

Piedmont area sales were predominantly out of the southern district. These dealers provided 93.1 percent of the spot distributed inland to the Piedmont and western areas of the state. The central and northern districts supplied a nominal 4.4 percent and 2.4 percent respectively.

In terms of all of the in-state sales, the central district was the principal supplier of spot to the North Carolina market. These dealers provided 61.9 percent of the spot distributed to the inland markets. The southern district was second with 34.3 percent, and the northern district supplied 3.8 percent.

Out-of-State Sales

Table 3-10 provides information on the states to which spot were shipped in 1974. The largest customer was South Carolina. That state received 12.4 percent of all fresh iced spot handled. Maryland was the second largest customer with 9.4 percent followed by New York and Virginia with 8.3 percent and 5.5 percent respectively.

In Table 3-11 the percentage of out-of-state sales for each district is enumerated. The central district's dealers were the largest out-of-state distributors of spot. They sold 50.6 percent of the spot followed by the southern district with 28.9 percent and the northern district with 20.5 percent.

District sales by principal customer areas are presented in Table 3-12. The northern district's principal customer was New York. That state received 54.5 percent of that district's out-of-state sales. The other main customers were Maryland with 25.9 percent and Virginia with 18.4 percent of the northern district's out-of-state sales.

The central district was the largest seller of spot to out-of-state markets. Its main customer was Maryland which received 36.6 percent of the central district shipments. New York was second with 19.8 percent and Virginia received 14.3 percent. Other states shown in Table 3-10 received the balance of 28.9 percent of the central district's out-of-state shipments of spot.

The southern district had two customers. South Carolina received 91 percent and Virginia received the other 9 percent of that district's out-of-state shipments of fresh iced spot.

Table 3-10

Distribution of Spot in 1974

	Northern District		Central District		Southern District		State Totals	
	Total	%	Total	%	Total	%	Total	%
N. C.								
Coastal	129,586	20.0	2,296,400	64.5	760,090	38.1	3,186,086	51.4
Piedmont	13,748	2.1	25,000	.7	525,000	26.3	563,748	9.1
Sub Total	143,334	22.1	2,321,400	65.2	1,285,090	64.4	3,749,834	60.5
Out of State								
Va.	92,004	14.3	188,750	5.3	64,000	3.2	344,754	5.5
Md.	129,743	20.0	452,800	12.7	-----	----	582,543	9.4
Penn.	1,333	.20	213,900	6.0	-----	----	215,233	3.4
N. Y.	272,692	42.3	244,500	6.9	-----	----	517,192	8.3
S. C.	4,485	.7	121,500	3.4	644,000	32.3	769,985	12.4
Ga.	-----	----	6,000	.17	-----	----	6,000	.09
Fla.	-----	----	5,000	.14	-----	----	5,000	.08
Ala.	-----	----	2,000	.06	-----	----	2,000	.03
La.	-----	----	2,000	.06	-----	----	2,000	.03
N. J.	40	.006	-----	----	-----	----	40	.006
Misc.	149	.023	-----	----	-----	----	149	.002
Sub Total	500,446	77.7	1,236,450	34.7	708,000	35.5	2,444,896	39.2
Totals	643,780	100	3,557,850	100	1,993,060	100	6,194,720	100

Table 3-11

SPOT

Percentage of 1974 In-State and Out-of-State Sales by District

	Northern		Central		Southern		State Total	
	Pounds	%	Pounds	%	Pounds	%	Pounds	%
In-State								
Coastal	129,586	4.0	2,296,400	72.1	760,090	23.9	3,186,086	100
Piedmont	13,748	2.4	25,000	4.4	525,000	93.1	563,748	100
Sub Total	143,334	3.8	2,321,400	61.9	1,285,090	34.3	3,749,834	
Out-of-State	500,446	20.5	1,236,450	50.6	708,000	28.9	2,444,896	100
Total	643,780		3,557,850		1,993,060		6,194,720	

Table 3-12

SPOT

Percentage of 1974 Out-of-State Sales to

Principal Markets for Each District

	Northern			Central			Southern			Totals		
	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales
Out-of-State												
South Carolina	------	----	----	------	----	----	644,000	91.0	32.3	769,985	31.5	12.4
Virginia	92,004	18.4	14.3	188,750	15.3	5.3	64,000	9.0	3.2	344,754	14.1	5.6
New York	272,692	54.5	42.3	244,500	19.8	6.9	------	----	----	517,192	21.2	8.3
Maryland	129,743	25.9	20.0	452,800	36.6	12.7	------	----	----	582,543	23.8	9.4
Sub Total	494,439			886,050			708,000			2,214,474		
Other States	6,007	1.2	.9	350,400	28.3	9.8	------	----	----	230,422	9.4	3.7
Total	500,446	100	77.5	1,236,450	100	34.7	708,000	100	35.5	2,444,896	100	39.4
Grand Total	643,780			3,557,850			1,993,060			6,194,720		

Distribution Patterns for Bluefish

In-State Sales

The state totals for bluefish appear in Table 3-13. Of the fresh iced bluefish handled in 1974, 21.1 percent went to markets in North Carolina. That represented a total volume of 438,644 pounds moving into this state. Of the total in-state sales, 410,621 pounds--or 93.6 percent--were sold in the coastal area and the balance of 6.4 percent moved into the Piedmont area.

In-state sales are further analyzed in Table 3-13. These data indicate that the northern district was the largest supplier of bluefish to the coastal market in 1974. Those dealers supplied 62.3 percent of the total followed by the central district with 34.3 percent and the southern district with only 3.4 percent.

Shipments to inland North Carolina markets originated primarily in the southern district. Of the 28,023 pounds shipped into those areas, 56.9 percent was shipped by the southern district dealers. The central district and northern district were almost shared equally in the balance of the shipments with 24.1 percent and 19.0 percent respectively.

In terms of all in-state sales, the northern district was the main supplier of the North Carolina market with 59.5 percent of the sales. This was followed by the central district with 33.7 percent and the southern district with 6.8 percent.

Out-of-State Sales

Table 3-13 provides information on out-of-state sales for all states receiving shipments of fresh iced bluefish. These data are broken down by districts and a state total is provided. The largest customer for bluefish, as indicated in Table 3-13, was New York. That state received 43.7 percent of all fresh iced bluefish handled by North Carolina dealers. The next largest customers were Maryland with 18.1 percent of sales and Virginia with 10.2 percent.

In Table 3-14 the data indicate that the northern district dealers were the largest out-of-state shippers of bluefish, as they shipped 80.8 percent of the total. The central and southern districts respectively shipped 18.8 and 0.4 percent of the total.

Sales by districts to principal markets are presented in Table 3-15. The principal markets for the northern district were New York with 64.6 percent of their total out-of-state sales, Maryland with 23.2 percent and Virginia with 10.2 percent.

The central district's largest customer was Pennsylvania with 33.8 percent of the out-of-state sales. Virginia received 24.4 percent, followed by Maryland with 22.5 percent and New York with 17.3 percent.

The southern district's sales of bluefish went primarily to South Carolina and Virginia. These states received 69.2 and 30.8 percent of its sales out-of-state.

Table 3-13

Distribution of Bluefish in 1974

	Northern District		Central District		Southern District		State Totals	
	Total	%	Total	%	Total	%	Total	%
N. C.								
Coastal	255,785	16.2	140,900	31.0	13,936	38.3	410,621	19.8
Piedmont	5,323	.3	6,750	1.5	15,950	43.8	28,023	1.3
Sub Total	261,108	16.5	147,650	32.5	29,886	82.1	438,644	21.1
Out of State								
Va.	135,439	8.6	74,850	16.5	2,000	5.5	212,289	10.2
Md.	306,334	19.4	69,150	15.2	-----	----	375,484	18.1
Penn.	1,500	.09	103,850	22.8	-----	----	105,350	5.0
N. Y.	853,539	54.0	53,000	11.6	-----	----	906,539	43.7
S. C.	4,935	.3	1,651	.36	4,500	12.4	11,086	.5
Ga.	-----	----	1,800	.4	-----	----	1,800	.08
Fla.	-----	----	1,500	.33	-----	----	1,500	.07
Ala.	-----	----	600	.13	-----	----	600	.02
La.	-----	----	600	.13	-----	----	600	.02
N. J.	19,180	1.2	-----	----	-----	----	19,180	.9
Misc.	165	.01	-----	----	------	----	165	.007
Sub Total	1,321,092	83.6	307,001	67.4	6,500	17.9	1,634,593	78.6
Totals	1,582,200	100	454,651	100	36,386	100	2,073,237	100

Table 3-14

BLUEFISH

Percentage of 1974 In-State and Out-of-State Sales by District

	Northern		Central		Southern		State Total	
	Pounds	%	Pounds	%	Pounds	%	Pounds	%
In-State								
Coastal	255,785	62.3	140,900	34.3	13,936	3.4	410,621	100
Piedmont	5,323	19.0	6,750	24.1	15,950	56.9	28,023	100
Sub Total	261,108	59.5	147,650	33.7	29,886	6.8	438,644	100
Out-of-State	1,321,092	80.8	307,001	18.8	6,500	0.4	1,634,593	100
Total	1,582,200		454,651		36,386		2,073,237	

Table 3-15

BLUEFISH

Percentage of 1974 Out-of-State Sales to

Principal Markets for Each District

	Northern			Central			Southern			Totals		
	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales
Out-of-State												
South Carolina	------	----	----	------	----	----	4,500	69.2	12.4	11,086	0.7	0.5
Virginia	135,439	10.2	8.6	74,850	24.4	16.5	2,000	30.8	5.5	212,289	13.0	10.2
New York	853,539	64.6	54.0	53,000	17.3	11.6	------	----	----	906,539	55.5	43.7
Maryland	306,334	23.2	19.4	69,150	22.5	15.2	------	----	----	375,484	22.9	18.1
Pennsylvania	------	----	----	103,850	33.8	22.8	------	----	----	105,350	6.4	5.0
Sub Total	1,295,312			300,850			6,500			1,610,748		
Other States	25,780	2.0	1.6	6,151	2.0	1.4	------	----	----	23,845	1.5	1.3
Total	1,321,092	100	83.6	307,001	100	67.5	6,500	100	17.9	1,634,593	100	78.7
Grand Total	1,582,200			454,651			36,386			2,073,237		

Distribution Patterns for Mullet

In-State Sales

The overall statistics on distribution of mullet in 1974 are presented in Table 3-16. These data indicate that 58.6 percent of the total fresh iced mullet handled by North Carolina coastal dealers was shipped to markets inside North Carolina. The coastal area received 57.3 percent of the in-state sales while the balance of 42.7 percent went to the inland areas of North Carolina.

Table 3-17 permits futher insight into in-state sales of mullet. The central district was the largest supplier of coastal area markets. These dealers supplied 45 percent of the mullet sold in the coastal area. The southern district was also a major supplier of coastal area mullet with 37.7 percent of sales. The northern district provided 17.3 percent of coastal area sales.

Shipments into the inland areas were overwhelmingly dominated by the southern district. These dealers shipped 99.2 percent of the mullet sold to inland dealers.

Looking at total in-state sales of mullet, the southern district was the dominant source with 63.9 percent of sales. The central district provided 26.2 percent and the northern district had 4.4 percent.

Out-of-State Sales

Table 3-16 provides a breakdown of all states receiving shipments of fresh iced mullet. New York dealers were the principal customers. They received 14.3 percent of the total mullet handled. South Carolina was a close second with 13.4 percent and Maryland was third with 7.6 percent. The northern district was the largest shipper of mullet out-of-state. Those dealers shipped 57.5 percent of all out-of-state shipments (see Table 3-17). The southern district was second with 31.3 percent followed by the central district's 11.2 percent.

The breakdown of out-of-state sales by principal customers appears in Table 3-18. The northern district's principal customer was New York. That state received 60.2 percent of the northern district's out-of-state sales. Maryland received 30.2 percent and Virginia 8.4 percent of those sales.

The central district sold very similar amounts to three states. Those states included South Carolina with 30.1 percent of sales, Virginia with 29.5 percent and Pennsylvania with 26.8 percent.

The southern district had only two out-of-state markets. South Carolina received 91.5 percent of its out-of-state shipments and Virginia received the balance of 8.5 percent.

The state receiving the largest amount of North Carolina fresh iced mullet was New York. That state received 34.6 percent of all North Carolina's out-of-state shipments of that species. South Carolina was a close second with 32.4 percent of the total. In third place was Maryland with 18.3 percent followed by Virginia with 10.8 percent.

Table 3-16

Distribution of Mullet in 1974

	Northern District		Central District		Southern District		State Totals	
	Total	%	Total	%	Total	%	Total	%
N. C.								
Coastal	105,205	19.6	274,328	75.8	229,635	25.1	609,168	33.6
Piedmont	495	.09	3,500	.97	450,000	49.2	453,995	25.0
Sub Total	105,700	19.7	277,828	76.7	679,635	74.3	1,063,163	58.6
Out of State								
Va.	36,159	6.7	24,850	6.9	20,000	2.2	81,009	4.5
Md.	130,098	6.7	7,450	2.06	-----	----	137,548	7.6
Penn.	-----	----	22,550	6.2	-----	----	22,550	1.2
N. Y.	259,649	48.4	-----	----	-----	----	259,649	14.3
S. C.	2,970	.5	25,300	7.0	215,000	23.5	243,270	13.4
Ga.	-----	----	1,200	.33	-----	----	1,200	.06
Fla.	-----	----	2,000	.55	-----	----	2,000	.1
Ala.	-----	----	400	.11	-----	----	400	.02
La.	-----	----	400	.11	-----	----	400	.02
N. J.	2,100	.4	-----	----	-----	----	2,100	.1
Misc.	99	.02	-----	----	-----	----	99	.005
Sub Total	431,075	80.2	84,150	23.2	235,000	25.7	750,225	41.3
Totals	536,775	100	361,978	100	914,635	100	1,813,388	100

Table 3-17

MULLET

Percentage of 1974 In-State and Out-of-State Sales by District

	Northern		Central		Southern		State Total	
	Pounds	%	Pounds	%	Pounds	%	Pounds	%
In-State								
Coastal	105,205	17.3	274,328	45.0	229,635	37.7	609,168	100
Piedmont	495	0.1	3,500	0.7	450,000	99.2	453,995	100
Sub-Total	105,700	4.4	277,828	26.2	679,635	63.9	1,063,163	100
Out-of-State	431,075	57.5	84,150	11.2	235,000	31.3	750,225	100
Grand Total	536,775		361,978		914,635		1,813,388	

Table 3-18

MULLET

Percentage of 1974 Out-of-State Sales to

Principal Markets for Each District

	Northern			Central			Southern			Totals		
	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales
Out-of-State												
South Carolina	-----	----	----	25,300	30.1	7.0	215,000	91.5	23.5	243,270	32.4	13.4
Virginia	36,159	8.4	6.7	24,850	29.5	6.9	20,000	8.5	2.2	81,009	10.8	4.5
Pennsylvania	-----	----	----	22,550	26.8	6.2	-----	----	----	22,550	3.0	1.2
New York	259,649	60.2	48.4	-----	----	----	-----	----	----	259,649	34.6	14.3
Maryland	130,098	30.2	6.7	-----	----	----	-----	----	----	137,548	18.3	7.5
Sub Total	425,906			72,700			215,000			744,026		
Other States	5,169	1.2	1.0	11,450	13.6	3.2	-----	----	----	6,199	0.8	0.4
Total	431,075	100	62.8	84,150	100	23.3	235,000	100	25.7	750,225	100	41.4
Grand Total	536,775			361,978			914,635			1,813,388		

DISTRIBUTION PATTERNS FOR SHRIMP

The statistics for distribution of shrimp in 1974 appear in Table 3-19. Those data indicate that 55.5 percent of the shrimp handled by the coastal dealers was distributed within North Carolina. The Piedmont received 718,172 pounds or 16.6 percent of the shrimp handled. The balance of 1,677,970 pounds representing 38.9 percent was distributed in the coastal North Carolina area.

In-State Sales

Viewing the data above in terms of sales inside North Carolina, 70 percent of fresh iced shrimp sold by the coastal dealers was sold in the coastal area. Inland dealers received 30 percent of the in-state shipments.

Shrimp sales are further analyzed in Table 3-20. The central district was the largest supplier of the coastal area with 83.1 percent of the coastal sales. The southern district was second with 12.1 percent, and the north was last with 4.8 percent.

Inland sales were also dominated by the central district dealers. Their sales of 60.4 percent of the fresh iced shrimp topped the southern district's 38.7 percent and the north's 0.9 percent.

The central district was the largest supplier of shrimp to all North Carolina dealers. Their sales amounted to 76.3 percent of all shrimp sold in-state during 1974. The southern district had only 20.1 percent followed by the north's 3.6 percent.

Out-of-State Sales

A number of states received substantial shipment of North Carolina shrimp. Table 3-19 presents data on which states received those shipments. Florida was the largest customer receiving 20.2 percent of all shrimp handled. Virginia was second with 8 percent.

Table 3-20 indicates that the central district shipped 86.5 percent of all out-of-state sales of shrimp. The north was second with 10.2 percent of the out-of-state sales followed by the south with 3.3 percent.

Out-of-state sales by districts are presented in Table 3-21. The central district's principal out-of-state customer in 1974 was Florida with 44.4 percent of its out-of-state sales. Virginia was second with 19.8 percent, followed by Georgia with 13.8 percent.

The southern district shipped 71.2 percent of its out-of-state shrimp to South Carolina. The balance went to Virginia.

The northern district's sales went to Florida and New York. Those states received 68.5 percent and 30.8 percent respectively of out-of-state sales.

The state receiving the largest amount of North Carolina shrimp was Florida. That state received 871,911 pounds of fresh iced shrimp. That figure represents 20.2 percent of the total handled and 45.5 percent of out-of-state sales. Virginia was the second largest customer with 347,078 pounds representing 8 percent of the total handled and 18.1 percent of out-of-state sales.

Table 3-19

Distribution of Shrimp in 1974:

	Northern District		Central District		Southern District		State Totals	
	Total	%	Total	%	Total	%	Total	%
N. C.								
Coastal	79,980	28.2	1,394,396	40.0	203,594	37.4	1,677,970	38.9
Piedmont	6,240	2.2	433,932	12.4	278,000	51.0	718,172	16.6
Sub Total	86,220	30.4	1,828,328	52.4	481,594	88.4	2,396,142	55.5
Out of State								
Va.	-----	----	329,078	9.4	18,000	3.3	347,078	8.1
Md.	693	.2	85,000	2.4	-----	----	85,693	2.0
Penn.	693	.2	-----	----	-----	----	693	.016
N. Y.	60,694	21.4	113,304	3.2	-----	----	173,998	4.1
S. C.	-----	----	82,400	2.4	44,500	8.2	125,900	2.9
Ga.	-----	----	227,860	6.5	-----	----	227,860	5.3
Fla.	135,000	47.6	736,911	21.1	-----	----	871,911	20.2
N. J.	-----	----	60,000	1.7	-----	----	60,000	1.4
Wash., D. C.	-----	----	24,120	.7	-----	----	24,120	0.6
Sub Total	197,080	69.4	1,658,673	47.4	62,500	11.5	1,917,253	44.6
Totals	283,300	100	3,487,001	100	544,094	100	4,313,395	100

Table 3-20

SHRIMP

Percentage of 1974 In-State and Out-of-State Sales by District

	Northern		Central		Southern		State Total	
	Pounds	%	Pounds	%	Pounds	%	Pounds	%
In-State								
Coastal	79,980	4.8	1,394,396	83.1	203,594	12.1	1,677,970	100
Piedmont	6,240	0.9	433,932	60.4	278,000	38.7	718,172	100
Sub-Total	86,220	3.6	1,828,328	76.3	481,594	20.1	2,396,142	100
Out-of-State	197,080	10.2	1,658,673	86.5	62,500	3.3	1,917,253	100
Total	283,300		3,487,001		544,094		4,313,395	

Table 3-21

SHRIMP

Percentage of 1974 Out-of-State Sales to

Principal Markets for Each District

	Northern			Central			Southern			Totals		
	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales	Pounds	% of Out-of State	% of Total Sales
Out-of-State												
New York	60,694	30.8	21.4	113,304	6.8	3.3	-----	----	----	173,998	9.1	4.0
Florida	135,000	68.5	47.6	736,911	44.4	20.1	-----	----	----	871,911	45.5	20.2
Virginia	-----	----	----	329,078	19.8	9.4	18,000	28.8	3.3	347,078	18.1	8.0
Georgia	-----	----	----	227,860	13.8	6.5	-----	----	----	227,860	11.9	5.3
South Carolina	-----	----	----	-----	----	----	44,500	71.2	8.2	125,900	6.5	2.9
Sub Total	135,000			1,407,153			44,500			1,746,747		
Other States	1,386	0.7	0.5	251,520	15.2	7.2	-----	----	----	170,506	8.9	4.0
Total	197,080	100	69.5	1,658,673	100	46.5	62,500	100	11.5	1,917,253	100	44.4
Grand Total	283,300			3,487,001			544,094			4,313,395		

Chapter 4

MARKETS SERVED BY THE NORTH CAROLINA COASTAL FISH DEALERS

Introduction

This chapter will explore the types of markets served by the dealers. More specifically, information will be presented on the proportions of the fresh iced products which were shipped to (1) wholesalers and distributors, (2) retail fish markets, (3) supermarkets, (4) restaurants, (5) seafood processors, and (6) sold as direct retail sales to consumers. The discussion is broken down by species and by districts. In addition, a summary table encompassing the state as a whole is provided for each species.

Markets for Flounder

Northern District

In-State-Markets. Sales of flounder within North Carolina by northern district dealers were primarily made to other coastal or Piedmont dealers and distributors (see Table 4-1). In Chapter 3 it was pointed out that only 7.3 percent of the sales of flounder in the Northern District were made in the coastal region. From Table 4-1 it is evident that 79 percent of those sales were to other dealers and distributors in the North Carolina Coastal Area. It would appear that the northern district's larger dealers serve primarily as suppliers to other dealers in the in-state markets. This conclusion is further supported by the nominal amounts distributed to retail fish markets, supermarkets, and restaurants, both along the Coast and in the Piedmont area.

It is interesting to note the very small quantity of flounder moving into coastal restaurants in the northern districts. This finding might raise a question about the rather substantial restaurant trade during the summer tourist season. The restaurant operators and the fish dealers both indicated that the business consisted primarily of portion-controlled product, i.e. fish that is filleted to specific weights as specified by the restaurant operators. That form of product was generally not available from the northern district dealers. A second factor is the seasonality of the catch. The flounder season is principally during the winter months around December while the tourist season is in the summer.

Table 4-1

Markets for Flounder in 1974:

Northern District

	Whole. & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	230,615	79.0	27,383	9.4	1,500	0.5	8,262	2.8	-----	---	24,000	8.2	291,760	100
Piedmont	86,506	97.1	750	0.8	-----	----	1,837	2.1	-----	---	-----	----	89,093	100
Sub Total	317,121	83.3	28,133	7.4	1,500	0.4	10,099	2.6	-----	---	24,000	6.3	380,853	100
Out of State														
Va.	1,402,905	99.9	-----	----	-----	----	918	0.07	-----	----	-----	----	1,403,823	100
Md.	278,877	100	-----	----	-----	----	-----	----	-----	----	-----	----	278,877	100
Penn.	13,350	100	-----	----	-----	----	-----	----	-----	----	-----	----	13,350	100
N. Y.	915,280	100	-----	----	-----	----	-----	----	-----	----	-----	----	915,280	100
S. C.	2,027,555	100	-----	----	-----	----	-----	----	-----	----	-----	----	2,027,555	100
Fla.	54,715	100	-----	----	-----	----	-----	----	-----	----	-----	----	54,715	100
N. J.	117,450	100	-----	----	-----	----	-----	----	-----	----	-----	-----	117,450	100
Misc.	919	100	-----	----	-----	----	-----	----	-----	----	-----	-----	919	100
Sub Total	4,811,051	99.9	-----	----	-----	----	918	0.02	-----	----	-----	----	4,811,969	100
Totals	5,128,172	98.8	28,133	0.5	1,500	0.03	11,017	0.2	-----	----	24,000	0.5	5,192,822	100

Out-of-State Markets. Out-of-state markets represented a substantial 92.6 percent of the northern district's sales (see Table 3-1, page 31). The exclusive market for the northern district with only one very minor exception was the wholesalers and distributors in the other states (see Table 4-1).

Central District

In-State Markets. The markets served by the central district dealers were very different from those of the northern district (see Table 4-2). The first important contrast is in terms of the proportions of volume which stayed in-state. A total of 78.9 percent of the central district's flounder stayed in North Carolina. The majority, or 75.4 percent, of that total volume was distributed in the coastal area. Second, the major coastal market served was the restaurant trade. Dealers in the central district shipped 4.5 million pounds representing 50 percent of their coastal area sales to that market. This finding points out a substantial difference between the northern and central district's restaurant markets. Few if any central district dealers were cutting portion-controlled fillets. The central district restaurant market was therefore buying non-portion-controlled fillets or whole flounders. The northern district's restaurant market, as discussed earlier, was buying portion-controlled fillets or whole flounders.

Central district dealers also engaged in active wholesale trade with other coastal zone wholesalers and distributors. This market represented 24.9 percent of their business. Direct retail sales were also greater than in the northern district. Slightly more than two million pounds or 23.2 percent of their coastal zone sales of flounder was sold at retail. Sales to independent retail fish markets represented only 118,500 pounds for 1.3 percent of their coastal zone market.

The Piedmont area received only slight attention from the central district dealers. Only 3.5 percent representing 426,000 pounds of flounder made it into the Piedmont zone. The market patterns were similiar but not the same as for the coastal area. Wholesalers and distributors received 54 percent of the total followed by restaurants with 17.8 percent and retail fish markets and supermarkets with 14.1 percent each.

Out-of-State Markets. The out-of-state markets for central district flounder were also more diverse than those for the northern district (see Table 4-2). Wholesalers and distributors purchased 90.8 percent of the out-of-state volume. Retail fish markets, supermarkets and restaurants shared almost equally in the remaining 9.2 percent.

Table 4-2

Markets for Flounder in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,265,100	24.9	118,500	1.3	60,000	0.6	4,550,500	50.0	------	---	2,105,100	23.2	9,099,100	100
Piedmont	230,000	54.0	60,000	14.1	60,000	14.1	76,000	17.8	------	---	-----	----	426,000	100
Sub Total	2,495,100	26.2	178,500	1.9	120,000	1.2	4,626,500	48.6	------	---	2,105,100	22.1	9,525,100	100
Out of State														
Va.	785,500	97.2	15,000	1.8	-----	----	8,000	1.0	-----	---	-----	----	808,500	100
Md.	522,000	100	-----	----	-----	----	-----	----	-----	---	-----	----	522,000	100
Penn.	181,000	100	-----	----	-----	----	-----	----	-----	---	-----	----	181,000	100
N. Y.	377,500	100	-----	----	-----	----	-----	----	-----	---	-----	----	377,500	100
S. C.	170,000	85.0	10,000	5.0	10,000	5.0	10,000	5.0	-----	---	-----	----	200,000	100
Ga.	24,000	25.0	24,000	25.0	24,000	25.0	24,000	25.0	-----	---	-----	----	96,000	100
Fla.	172,000	74.2	20,000	8.6	20,000	8.6	20,000	8.6	-----	---	-----	----	232,000	100
Ala.	8,000	25.0	8,000	25.0	8,000	25.0	8,000	25.0	-----	---	-----	----	32,000	100
La.	8,000	25.0	8,000	25.0	8,000	25.0	8,000	25.0	-----	---	-----	----	32,000	100
N. J.	60,000	100	-----	----	-----	----	-----	----	-----	---	-----	----	60,000	100
Sub Total	2,308,000	90.8	85,000	3.3	70,000	2.8	78,000	3.1	-----	---	-----	----	2,541,000	100
Totals	4,803,100	39.8	263,500	2.2	190,000	1.6	4,704,500	39.0	-----	---	2,105,000	17.4	12,066,100	100

Southern District

In-State Markets. In contrast to the northern district's sales of flounder to the wholesalers and distributors and the central district's sales to restaurants, the southern district's principal market was retail fish markets (see Table 4-3). This market absorbed 71.8 percent of the southern dealers' coastal zone sales and 93.8 percent of their Piedmont area sales. Restaurants in the coastal area were also a significant outlet with 22.4 percent of the coastal zone sales.

Out-of State Markets. The southern district was almost equally balanced between in-state and out-of-state sales. In-state sales represented approximately 49 percent of total sales while the balance of 51 percent was out-of-state sales. The principal market followed the in-state pattern of selling to retail fish markets. That market absorbed 65.4 percent of sales while supermarkets received 31.7 percent.

Aggregate State Data

The data for the state as a whole appear in Table 4-4. These data indicate the aggregate markets served by the state as a whole, and the weights and percentages moving into each market. The largest market served by the state was other wholesalers and distributors with 43 percent of the total. That market was followed by retail fish markets and restaurants with 21.2 and 21.3 percent of the market respectively.

Supermarkets accounted for only 5.5 percent of the market. When the supermarkets' and retail fish markets' shares are combined to form an aggregate total for final retail outlets, they represent 26.7 percent of the market and 6,283,133 pounds of flounder. Conspicuous by its absence is the sale of flounder to seafood processors. Some of the North Carolina product may have been ultimately sold to processors in 1974, however, the dealers contacted in this study did not indicate any such sales.

Table 4-3

Markets for Flounder in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	11,850	0.8	987,500	71.8	67,500	4.4	308,079	22.4	-----	----	1,077	0.08	1,376,006	100
Piedmont	90,000	5.3	1,595,000	93.8	15,000	0.9	-----	----	-----	----	-----	----	1,700,000	100
Sub Total	101,850	3.3	2,582,500	83.9	82,500	2.7	308,079	10.0	-----	----	1,077	.04	3,076,006	48.8
Out of State														
Va.	60,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	60,000	100
Penn.	18,852	100	-----	----	-----	----	-----	----	-----	-----	-----	----	18,852	100
N. Y.	13,466	100	-----	----	-----	----	-----	----	-----	----	-----	----	13,466	100
S. C.	-----	----	2,112,500	67.4	1,022,500	32.6	-----	----	-----	----	-----	----	3,135,000	100
Sub Total	92,318	2.9	2,112,500	65.4	1,022,500	31.7	-----	----	-----	----	-----	----	3,227,318	100
Totals	194,168	3.1	4,695,000	74.5	1,105,000	17.5	308,079	4.9	-----	----	1,077	0.02	6,303,324	100

Table 4-4

Markets for Flounder in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,507,565	23.3	1,133,383	10.5	129,000	1.2	4,866,841	45.2	-----	---	2,130,177	19.8	10,766,966	100
Piedmont	406,506	18.4	1,655,750	74.7	75,000	3.4	77,837	3.5	-----	---	-----	---	2,215,093	100
Sub Total	2,914,071	22.4	2,789,133	21.5	204,000	1.6	4,944,678	38.1	-----	---	2,130,177	16.4	12,982,059	100
Out of State														
Va.	2,248,405	98.9	15,000	0.7	-----	----	8,918	0.4	-----	---	-----	----	2,272,323	100
Md.	800,877	100	-----	----	-----	----	-----	----	-----	---	-----	----	800,877	100
Penn.	213,202	100	-----	----	-----	----	-----	----	-----	---	-----	----	213,202	100
N. Y.	1,306,246	100	-----	----	-----	----	-----	----	-----	---	-----	----	1,306,246	100
S. C.	2,197,555	41.0	2,122,500	39.6	1,032,500	19.2	10,000	0.2	-----	---	-----	----	5,362,555	100
Ga.	24,000	25.0	24,000	25.0	24,000	24.0	24,000	25.0	-----	---	-----	----	96,000	100
Fla.	226,715	25.0	20,000	25.0	20,000	25.0	20,000	25.0	-----	---	-----	----	286,715	100
Ala.	8,000	25.0	8,000	25.0	8,000	25.0	8,000	25.0	-----	---	-----	----	32,000	100
La.	8,000	25.0	8,000	25.0	8,000	25.0	8,000	25.0	-----	---	-----	----	32,000	100
N. J.	177,450	100	-----	----	-----	----	-----	----	-----	---	-----	----	177,450	100
Misc.	919	100	-----	----	-----	----	-----	----	-----	---	-----	----	919	100
Sub Total	7,211,369	71.1	2,197,500	20.8	1,092,500	10.3	78,918	0.74	-----	---	-----	----	10,580,287	100
Totals	10,125,440	43.0	4,986,633	21.2	1,296,500	5.5	5,023,596	21.3	-----	---	2,130,177	9.0	23,562,346	100

Conclusions About the Flounder Markets

The markets for North Carolina flounder vary depending upon the fishing district within the state that is being examined. The patterns, however, are very distinctive. The northern district was primarily an exporter of flounder to wholesalers and distributors in neighboring states both north and south of North Carolina. The largest market was South Carolina and the second largest was Virginia. The central district sold primarily to in-state markets with a large quantity of flounder being sold to coastal area restaurants.

The southern district dealers were balanced between in and out-of-state markets. The retail fish markets and supermarkets represented their market for fresh iced flounder. Within the state, the southern district served both the coastal and the Piedmont areas. The Piedmont area, however, received more flounder than did the coastal area. It appears from the data collected on the flounder market that the southern district dealers were the main suppliers of fresh iced flounder to the inland areas of North Carolina.

Markets for Gray Trout

Northern District

In-State Markets. The in-state market for gray trout from the northern district was strongest is the coastal zone with wholesalers and distributors as the principal customers. That market accounted for 75.2 percent of coastal sales (see Table 4-5). Direct retail sales by the dealers were also an important 16.8 percent of sales.

Piedmont area sales, as was the case for flounder, were almost exclusively to wholesalers and distributors. The in-state market in the northern district purchased a total of 1,196,548 pounds of gray trout with 80.3 percent of that going to wholesalers and distributors, 13 percent to direct retail sales, and 4.9 percent to retail fish markets. The restaurant market was very small consuming only 17,119 pounds or 1.4 percent of the in-state volume.

Out-of-State Markets. In the out-of-state market, 99.9 percent of all the gray trout went to wholesalers and distributors. Approximately 2,000 pounds of this product was shipped to restaurants in Virginia.

Central District

In-State Markets. The in-state markets for gray trout in the central district are reported in Table 4-6. In contrast to the northern district's concentration on the wholesaler and distributor market, the central district's main coastal zone market was the retail fish market. That customer group absorbed 81.2 percent of the coastal area sales of 5,794,150 pounds. The wholesaler-distributor market did get some activity with 17.3 percent of the total coastal sales. The Piedmont area was a very small market for the central district. That market received only 41,250 pounds of gray trout, the majority of which went to wholesalers and distributors. In contrast, the coastal area markets consumed 5,794,150 pounds of gray trout.

Out-of-State Markets. Out-of-state markets for the central district were slightly more diverse than for the northern district. A majority of 96.4 percent of the sales did go to wholesalers and distributors but it was spread across the nine states indicated in Table 3-6. Restaurants, retail fish markets and supermarkets were minor purchasers of the gray trout handled by the central district dealers.

Table 4-5

Markets for Gray Trout in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	693,950	75.2	55,513	6.0	5,200	0.6	13,142	1.4	-----	----	155,200	16.8	923,005	100
Piedmont	266,966	97.6	2,600	1.0	-----	----	3,977	1.4	-----	----	-----	----	273,543	100
Sub Total	960,916	80.3	58,113	4.9	5,200	0.4	17,119	1.4	-----	----	155,200	13.0	1,196,548	100
Out of State														
Va.	456,595	99.6	-----	----	-----	----	1,988	0.43	-----	----	-----	----	458,583	100
Md.	284,111	100	-----	----	-----	----	-----	----	-----	----	-----	----	284,111	100
Penn.	1,733	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,733	100
N. Y.	657,871	100	-----	----	-----	----	-----	----	-----	----	-----	----	657,871	100
S. C.	59,655	100	-----	----	-----	----	-----	----	-----	----	-----	----	59,655	100
N. J.	8,460	100	-----	----	-----	----	-----	----	-----	----	-----	----	8,460	100
Misc.	1,989	100	-----	----	-----	-----	-----	----	-----	----	-----	----	1,989	100
Sub Total	1,470,414	99.9	-----	----	-----	----	1,988	0.1	-----	----	-----	----	1,472,402	100
Totals	2,431,330	91.1	58,113	2.2	5,200	0.2	19,107	0.7	-----	----	155,200	5.8	2,668,950	100

Table 4-6

Markets for Gray Trout in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	1,002,650	17.3	4,706,750	81.2	1,500	0.03	16,500	0.3	1,750	0.03	65,000	1.1	5,794,150	100
Piedmont	36,750	89.1	1,500	3.6	1,500	3.6	1,500	3.6	-----	----	-----	----	41,250	100
Sub Total	1,039,400	17.8	4,708,250	80.7	3,000	0.05	18,000	0.3	1,750	0.03	65,000	1.1	5,835,400	100
Out of State														
Va.	71,050	90.5	3,500	4.5	-----	----	3,950	5.0	-----	----	-----	----	78,500	100
Md.	27,650	100	-----	----	-----	----	-----	----	-----	----	-----	----	27,650	100
Penn.	74,250	100	-----	----	-----	----	-----	----	-----	----	-----	----	74,250	100
N. Y.	27,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	27,000	100
S. C.	28,750	100	-----	----	-----	----	-----	----	-----	----	-----	----	28,750	100
Ga.	600	100	-----	----	-----	----	-----	----	-----	----	-----	----	600	100
Fla.	1,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,000	100
Ala.	200	25.0	200	25.0	200	25.0	200	25.0	-----	----	-----	----	800	100
La.	200	25.0	200	25.0	200	25.0	200	25.0	-----	----	-----	----	800	100
Sub Total	230,700	96.4	3,900	1.6	400	0.2	4,350	1.8	-----	----	-----	----	239,350	100
Totals	1,270,100	20.9	4,712,150	77.5	3,400	0.06	22,350	0.4	1,750	0.03	65,000	1.1	6,074,750	100

Southern District

In-State Markets. As reported in Chapter 3 the in-state market was the principal outlet for southern district gray trout. The coastal zone absorbed the majority of those in-state sales (see Table 4-7). Retail fish markets were the main customer group absorbing 77.3 percent of the 174,545 pounds sold. Supermarkets were second with 13.4 percent of coastal zone sales.

The Piedmont area purchased 113,000 pounds of gray trout. Retail fish markets and supermarkets received 88.9 percent and 3.6 percent respectively. As in the case of flounder, these final retail outlet constituted a majority of the southern district's markets for seafood products.

Out-of-State Markets. The southern district's out-of-state markets for gray trout were very small. All 67,000 pounds was sold in South Carolina where 67.2 percent went to retail fish markets and 8.9 percent to supermarkets. The balance of 23.9 percent went to wholesalers and distributors in Virginia.

Aggregate State Data

Data for all three fishing districts are combined in Table 4-8. Those data indicate the nature of the aggregate markets for gray trout served by North Carolina's coastal fish dealers. The major in-state markets were retail fish markets (68.3 percent), wholesalers and distributors (27.6 percent), and direct retail sales (3.1 percent). Restaurants and supermarkets purchased proportionally very small quantities of this species.

The out-of-state sales of gray trout totaled 1,778,752 pounds of which 91.5 percent went to wholesalers and distributors. Retail fish markets received 2.75 percent and the balance of 0.8 percent was shared equally by supermarkets and restaurants.

Table 4-7

Markets for Gray Trout in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	10,773	6.2	135,000	77.3	23,386	13.4	-----	----	-----	----	5,386	3.1	174,545	100
Piedmont	8,500	7.5	100,500	88.9	4,000	3.6	-----	----	-----	----	-----	----	113,000	100
Sub Total	19,273	6.7	235,500	81.9	27,286	9.5	-----	----	-----	----	5,386	1.9	287,545	100
Out of State														
Va.	16,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	16,000	100
S. C.	-----	----	45,000	88.2	6,000	11.8	-----	----	-----	----	-----	----	51,000	100
Sub Total	16,000	23.9	45,000	67.2	6,000	8.9	-----	----	-----	----	-----	----	67,000	100
Totals	35,273	10.0	280,500	79.1	33,386	9.4	-----	----	-----	----	5,386	1.5	354,545	100

Table 4-8

Markets for Gray Trout in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	1,707,373	24.7	4,897,263	71.0	30,086	0.43	29,642	0.43	1,750	.025	225,586	3.2	6,891,700	100
Piedmont	312,216	73.0	104,600	24.4	5,500	1.3	5,477	1.3	-----	----	-----	----	427,793	100
Sub Total	2,019,589	27.6	5,001,863	68.3	35,586	0.5	35,119	0.5	1,750	.024	225,586	3.1	7,319,493	100
Out of State														
Va.	543,645	98.3	3,500	0.7	-----	----	5,938	1.1	-----	----	-----	----	553,083	100
Md.	311,761	100	-----	----	-----	----	-----	----	-----	----	-----	----	311,761	100
Penn.	75,983	100	-----	----	-----	----	-----	----	-----	----	-----	----	75,983	100
N. Y.	684,871	100	-----	----	-----	----	-----	----	-----	----	-----	----	684,871	100
S. C.	88,405	63.4	45,000	32.3	6,000	4.3	-----	----	-----	----	-----	----	139,405	100
Ga.	600	100	-----	----	-----	----	-----	----	-----	----	-----	----	600	100
Fla.	1,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,000	100
Ala.	200	25.0	200	25.0	200	25.0	200	25.0	-----	----	-----	----	800	100
La.	200	25.0	200	25.0	200	25.0	200	25.0	-----	----	-----	----	800	100
N. J.	8,460	100	-----	----	-----	----	-----	----	-----	----	-----	----	8,460	100
Misc.	1,989	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,989	100
Sub Totals	1,717,114	96.5	48,900	2.7	6,400	0.4	6,338	0.4	-----	----	-----	----	1,778,752	100
Totals	3,736,703	41.1	5,050,763	55.5	41,986	0.5	41,457	0.4	1,750		225,586	2.5	9,098,245	100

Conclusions About the Gray Trout Markets

The gray trout market in aggregate was somewhat similar to the flounder market in that wholesalers and distributors, and retail fish markets received the majority of the product marketed. There were differences in that proportionally more gray trout than flounder moved to retail fish markets and proportionally less to wholesalers and distributors. Sales of gray trout to restaurants and supermarkets did not constitute important markets for this product. Even the direct retail sales by the dealers were small as a proportion of the total volume handled.

The in-state market was the major outlet for this species. It is apparent that North Carolina consumers either liked to prepare gray trout in their homes and there was either sufficient demand here to absorb the majority of the catch, or that there was insufficient out-of-state demand to make prices high enough to draw the product into the more distant markets.

Markets for Croaker

Northern District

In-State Markets. Of the 1,222,980 pounds of croaker handled by the northern district dealers, only 184,923 or 15.1 percent was sold inside North Carolina. A majority of 164,865 pounds of that total was sold in the coastal zone (see Table 4-9). The major coastal zone markets were wholesalers and distributors (27.4 percent) and retail fish markets (17.9). A fairly good local market was apparently present for croaker as the dealers indicated that 79,000 pounds or 47.9 percent of their coastal area sales were direct retail sales to final consumers.

Only the nominal quantity of 20,058 pounds of croaker moved into the Piedmont markets from the northern district. The majority of 79.9 percent of that was sold to wholesalers and distributors. Retail fish markets and restaurants purchased about 10 percent each.

Out-of-State Markets. The out-of-state market represented 84.8 percent of the northern district's sales of croaker. Wholesalers and distributors received 99.9 percent of those shipments. Only one dealer reported sales to the other types of markets and that was a small sale to a restaurant in Virginia.

Central District

In-State Markets. The central district's sales in North Carolina encompassed 67.4 percent of the total croaker handled with almost all of that being sold in the coastal zone (see Table 4-10). The largest market served was the wholesaler and distributor market which received 94.2 percent of the 2,495,200 pounds of croaker sold in the coastal zone. Retail fish markets purchased 101,750 pounds for 4.1 percent of the total. Restaurants consumed 25,500 pounds but that only represented 1.0 percent of sales making that a very insignificant market.

Piedmont area markets were dominated by the wholesalers who bought 52.6 percent of the 47,500 pounds of croaker moving inland. As before, the Piedmont remained a very insignificant market for the central district dealers.

Out-of-State Markets. The markets served outside North Carolina purchased 32.4 percent of the central district's croaker. A majority of 77.2 percent of those 1,228,450 pounds of croaker was sold to wholesalers and distributors. Supermarkets were also an important outlet for this species with purchases of 258,750 pounds for 21.1 percent of the out-of-state market for this district.

Table 4-9

Markets for Croaker in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	45,080	27.4	29,508	17.9	4,000	2.4	7,277	4.4	-----	----	79,000	47.9	164,865	100
Piedmont	16,035	79.9	2,000	10.0	-----	----	2,023	10.1	-----	----	-----	----	20,058	100
Out of State														
Va.	391,310	99.7	-----	----	-----	----	1,011	0.3	-----	----	-----	----	392,321	100
Md.	192,402	100	-----	----	-----	----	-----	----	-----	----	-----	----	192,402	100
Penn.	51,333	100	-----	----	-----	----	-----	----	-----	----	-----	----	51,333	100
N. Y.	363,154	100	-----	----	-----	----	-----	----	-----	----	-----	----	363,154	100
S. C.	30,345	100	-----	----	-----	----	-----	----	-----	----	-----	----	30,345	100
N. J.	7,490	100	-----	----	-----	----	-----	----	-----	----	-----	----	7,490	100
Misc.	1,012	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,012	100
Sub Total	1,037,046	99.9	-----	----	-----	----	1,011	0.1	-----	----	-----	----	1,038,057	100
Totals	1,098,161	89.8	31,508	2.6	4,000	.3	10,311	.8	-----	----	79,000	6.5	1,222,980	100

Table 4-10

Markets for Croaker in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,351,050	94.2	101,750	4.1	7,500	0.3	25,500	1.0	1,250	.05	8,150	0.3	2,495,200	100
Piedmont	25,000	52.6	7,500	15.8	7,500	15.8	7,500	15.8	-----	----	-----	----	47,500	100
Out of State														
Va.	94,750	96.4	2,500	2.6	-----	----	1,000	1.0	-----	----	-----	----	98,250	100
Md.	276,500	100	-----	----	-----	----	-----	----	-----	----	-----	----	276,500	100
Penn.	281,100	52.9	-----	----	250,000	47.1	-----	----	-----	----	-----	----	531,100	100
N. Y.	83,600	100	-----	----	-----	----	-----	----	-----	----	-----	----	83,600	100
S. C.	205,250	98.2	1,250	0.6	1,250	0.6	1,250	0.6	-----	----	-----	----	209,000	100
Ga.	3,000	25.0	3,000	25.0	3,000	25.0	3,000	25.0	-----	----	-----	----	12,000	100
Fla.	2,500	25.0	2,500	25.0	2,500	25.0	2,500	25.0	-----	----	-----	----	10,000	100
Ala.	1,000	25.0	1,000	25.0	1,000	25.0	1,000	25.0	-----	----	-----	----	4,000	100
La.	1,000	25.0	1,000	25.0	1,000	25.0	1,000	25.0	-----	----	-----	----	4,000	100
Sub Total	948,700	77.2	11,250	0.9	258,750	21.1	9,750	0.8	-----	----	-----	----	1,228,450	100
Totals	3,324,750	88.2	120,500	3.2	273,750	7.2	42,750	1.1	1,250	.03	8,150	.2	3,771,150	100

Southern District

In-State Markets. The in-state markets for the southern district represented 48.9 percent of the southern district's sales of croaker. That figure represented 1,918,931 pounds of croaker of which slightly less than half was sold in the coastal zone and the balance moved into the Piedmont area of the state (see Table 4-11). The major market for these dealers, both on the coast and in the Piedmont, was retail fish markets. In all, 91.4 percent of the in-state sales went to the retail fish markets and 4.6 percent went to supermarkets. This pattern is in line with the southern district's sales of both flounder and gray trout.

Out-of-State Markets. The out-of-state markets for southern district croaker also approximate the patterns followed in this district by the species already discussed. Retail fish markets in South Carolina purchased 95.4 percent of the 2,008,000 pounds shipped out-of-state while the balance went to wholesalers and distributors in Virginia (3.2 percent) and supermarkets in South Carolina (1.2 percent).

Aggregate State Data

The aggregate state data for croaker appear in Table 4-12. Those data point out that within North Carolina the major markets for croaker were wholesalers and distributors, and retail outlets such as fish markets and supermarkets.

The out-of-state markets were split almost equally between wholesalers and distributors (48 percent) and retail fish markets (45.2 percent). The sales to retail fish markets, however, were predominantly by the southern district dealers, while the wholesaler and distributor sales were by central and northern district dealers as discussed earlier.

Table 4-11

Markets for Croaker in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	13,465	1.5	826,733	90.0	72,000	7.8	-----	----	-----	----	6,733	0.7	918,931	100
Piedmont	56,000	5.6	928,000	92.8	16,000	1.6	=----	----	-----	----	-----	----	1,000,000	100
Sub Total	69,465	3.6	1,754,733	91.4	88,000	4.6	-----	----	-----	----	6,733	0.4	1,918,931	100
Out of State														
Va.	64,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	64,000	100
S. C.	-----	----	1,920,000	98.8	24,000	1.2	-----	----	-----	----	-----	----	1,944,000	100
Sub Total	64,000	3.2	1,920,000	95.6	24,000	1.2	-----	----	-----	----	-----	----	2,008,000	100
Totals	133,465	3.4	3,674,733	93.6	112,000	2.8	-----	----	-----	----	6,733	0.2	3,926,931	100

Table 4-12

Markets for Croaker in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,409,595	67.3	957,991	26.8	83,500	2.3	32,777	.9	1,250	.04	93,883	2.6	3,578,996	100
Piedmont	97,035	9.0	937,500	87.8	23,500	2.2	9,523	0.9	-----	----	-----	----	1,067,558	100
Sub Total	2,506,630	53.9	1,895,491	40.8	107,000	2.3	42,300	0.9	1,250	.03	93,883	2.0	4,646,554	100
Out of State														
Va.	550,060	99.2	2,500	0.4	-----	----	2,011	0.4	-----	----	-----	----	554,571	100
Md.	468,902	100	-----	----	-----	----	-----	----	-----	----	-----	----	468,902	100
Penn.	332,433	57.1	-----	----	250,000	42.9	-----	----	-----	----	-----	----	582,433	100
N, Y.	446,754	100	-----	----	-----	----	-----	----	-----	----	-----	----	446,754	100
S. C.	235,595	10.8	1,921,250	88.0	25,250	1.1	1,250	0.06	-----	----	-----	----	2,183,345	100
Ga.	3,000	25.0	3,000	25.0	3,000	25.0	3,000	25.0	-----	----	-----	----	12,000	100
Fla.	2,500	25.0	2,500	25.0	2,500	25.0	2,500	25.0	-----	----	-----	----	10,000	100
Ala.	1,000	25.0	1,000	25.0	1,000	25.0	1,000	25.0	-----	----	-----	----	4,000	100
La.	1,000	25.0	1,000	25.0	1,000	25.0	1,000	25.0	-----	-----	-----	----	4,000	100
N. J.	7,490	100	-----	----	-----	----	-----	----	-----	----	-----	----	7,490	100
Misc.	1,012	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,012	100
Sub Total	2,049,746	48.0	1,931,250	45.2	282,750	6.6	10,761	0.2	-----	----	-----	----	4,274,507	100
Totals	4,556,376	51.1	3,826,741	42.9	389,750	4.4	53,061	0.5	1,250	.01	93,883	1.1	8,921,061	100

Conclusion About Croaker Markets

Percentage-wise and pound-wise, the in-state market for croaker was not as great as the in-state market for gray trout or flounder. The coastal zone, however, continued to be the major consumer of the catch with 70 percent of the croaker being sold in that market.

The largest single purchasers of croaker were the retail fish markets in South Carolina. That customer group purchased 21.5 percent of the total pounds reported by the dealers surveyed.

There appeared to be a substantial market for croaker at the retail fish market level both in and out-of-state. The southern district dealers, seemed to be the only dealers who actively sought to serve that market during the 1974 period.

Markets for Spot

Northern District

In-State Markets. The northern district dealers sold 143,334 pounds of spot in in-state markets (see Table 4-13). The coastal zone was the major sales area with 129,586 pounds. Direct retail sales were the largest market with 60.9 percent of the total. Wholesalers and distributors were second with 27.7 percent.

Sales in the Piedmont went primarily to wholesalers and distributors. They purchased 83.3 percent of the 13,748 pounds going into that area. Retail fish markets purchased 2,000 pounds for 14.5 percent of those sales.

Out-of-State Markets. Wholesalers and distributors purchased 99.9 percent of the out-of-state sales of spot from the northern district. This finding is in line with the distribution patterns for previously discussed species.

Central District

In-State Markets. The central district sold 2,321,400 pounds of spot in in-state markets (see Table 4-14) with the coastal zone receiving 2,296,400 pounds of that total. The dominant market in the coastal zone was wholesalers and distributors with 92 percent of that volume. Retail fish markets were second with 95,150 pounds (4.1 percent) followed by direct retail sales of 65,100 pounds (2,8 percent).

The Piedmont area received only 25,000 pounds of the central district's sales in North Carolina. Wholesalers and distributors received 13,750 pounds (55 percent) of that with the balance split equally between retail fish markets, supermarkets and restaurants.

Out-of-State Markets. Sales to markets outside North Carolina totaled 1,236,450 pounds. Of that total, 95.7 percent was sold to wholesalers and distributors. The second largest market was supermarkets with 34,375 pounds (2.8 percent). Seafood processors also purchased small quantities of spot. That market consumed 4,375 pounds, but it was spread out over five states with no one state receiving more than 1,500 pounds.

Table 4-13

Markets for Spot in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	35,920	27.7	7,828	6.1	4,000	3.1	2,838	2.2	-----	----	79,000	60.9	129,586	100
Piedmont	11,449	83.3	2,000	14.5	-----	----	299	2.2	-----	----	-----	----	13,748	100
Sub Total	47,369	33.1	9,828	6.8	4,000	2.8	3,137	2.2	-----	----	79,000	55.1	143,334	100
Out of State														
Va.	91,855	99.8	-----	----	-----	----	149	.2	-----	----	-----	----	92,004	100
Md.	129,743	100	-----	----	-----	----	-----	----	-----	-----	-----	----	129,743	100
Penn.	1,333	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,333	100
N. Y.	272,692	100	-----	----	-----	----	-----	----	-----	----	-----	----	272,692	100
S. C.	4,485	100	-----	----	-----	----	-----	----	-----	----	-----	----	4,485	100
N. J.	40	100	-----	----	-----	----	-----	----	-----	----	-----	----	40	100
Misc.	149	100	-----	----	-----	----	-----	----	-----	----	-----	----	149	100
Sub Total	500,297	99.9	-----	----	-----	----	149	.1	-----	----	-----	----	500,446	100
Totals	547,666	85.1	9,828	1.5	4,000	.6	3,286	.5	-----	----	79,000	12.3	643,780	100

Table 4-14

Markets for Spot in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,112,050	92.0	95,150	4.1	3,750	.16	19,750	.8	500	.02	65,100	2.8	2,296,400	100
Piedmont	13,750	55.0	3,750	15.0	3,750	15.0	3,750	15.0	-----	----	-----	----	25,000	100
Sub Total	2,125,800	92.0	79,000	3.4	7,500	.32	23,500	1.0	500	1.1	65,100	2.8	2,321,400	100
Out of State														
Va.	179,250	95.0	1,000	.5	-----	----	8,500	4.5	-----	----	-----	----	188,750	100
Md.	452,800	100	-----	----	-----	----	-----	----	-----	----	-----	----	452,800	100
Penn.	183,900	86.0	-----	----	30,000	14.0	-----	----	-----	----	-----	----	213,900	100
N. Y.	244,500	100	-----	----	-----	----	-----	----	-----	----	-----	----	244,500	100
S. C.	119,625	98.5	625	.5	635	.5	-----	----	625	.5	-----	----	121,500	100
Ga.	1,500	25.0	1,500	25.0	1,500	25.0	-----	----	1,500	25.0	-----	----	6,000	100
Fla.	1,250	25.0	1,250	25.0	1,250	25.0	-----	----	1,250	25.0	-----	----	5,000	100
Ala.	500	25.0	500	25.0	500	25.0	-----	----	500	25.0	-----	----	2,000	100
La.	500	25.0	500	25.0	500	25.0	-----	----	500	25.0	-----	----	2,000	100
Sub Total	1,183,825	95.7	5,375	.4	34,375	2.8	8,500	.7	4,375	.4	-----	----	1,236,450	100
Totals	3,309,625	93.1	104,375	2.9	41,875	1.2	32,000	.9	4,875	.1	65,100	1.8	3,557,850	100

Southern District

In-State Markets. This district sold 1,285,090 pounds of spot inside North Carolina (see Table 4-15). The coastal area received 760,090 pounds of that total with retail fish markets purchasing 84.9 percent. Supermarkets were the second largest customer with 10.9 percent of the total.

The Piedmont area purchased 525,000 pounds of southern district spot. Retail fish markets were the major market with 84.5 percent of the total followed by supermarkets with 7.7 percent. Wholesalers and distributors purchased 90,054 pounds for 7 percent of the spot shipped into the Piedmont.

Out-of-State Markets. Sales of spot outside North Carolina totaled 708,000 pounds for the southern district. Of that, 87.6 percent was sold to retail fish markets and 3.4 percent to supermarkets. Both of these market groups were located in South Carolina. The only other out-of-state market was wholesalers and distributors in Virginia.

Aggregate State Data

State totals for the spot markets appear in Table 4-16. Within North Carolina the majority of 60.3 percent of the 3,749,834 pounds of spot were sold to wholesalers and distributors. Retail fish markets were major buyers with 1,194,328 pounds for 31.9 percent. Direct retail sales (4.1 percent) and supermarkets (2.9 percent) also played an important role.

The out-of-state markets totaled 2,444,896 pounds of which 71.5 percent went to wholesalers and distributors. Retail fish markets' purchases of 625,375 pounds represented 25.6 percent of sales.

Table 4-15

Markets for Spot in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	21,554	2.8	645,000	84.9	82,773	10.9	-----	----	-----	----	10,773	1.4	760,090	100
Piedmont	68,500	13.0	440,500	84.0	16,000	3.0	-----	----	-----	----	-----	----	525,000	100
Sub Total	90,054	7.0	1,085,500	84.5	98,773	7.7	-----	----	-----	----	10,773	.8	1,285,090	100
Out of State														
Va.	64,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	64,000	100
S. C.	-----	----	620,000	96.3	24,000	3.7	-----	----	-----	----	-----	----	644,000	100
Sub Total	64,000	9.0	620,000	87.6	24,000	3.4	-----	----	-----	----	-----	----	708,000	100
Totals	154,054	7.7	1,705,500	85.6	122,773	6.2	-----	----	-----	----	10,733	.5	1,993,060	100

Table 4-16

Markets for Spot in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,169,524	68.1	748,078	23.5	90,523	2.8	22,588	.7	500	.1	154,873	4.8	3,186,086	100
Piedmont	93,699	16.6	446,250	79.2	19,750	3.5	4,049	.7	-----	----	------	----	563,748	100
Sub Total	2,263,223	60.3	1,194,328	31.9	110,273	2.9	26,637	.7	500	.1	154,873	4.1	3,749,834	100
Out of State														
Va.	335,105	97.2	1,000	.3	-----	----	8,649	2.5	-----	----	-----	----	344,754	100
Md.	582,543	100	-----	----	-----	----	-----	----	-----	----	-----	----	582,543	100
Penn.	185,233	86.1	-----	----	30,000	13.9	-----	----	-----	----	-----	----	215,233	100
N. Y.	517,192	100	-----	----	-----	----	-----	----	-----	----	-----	----	517,192	100
S. C.	124,110	16.1	620,625	80.6	24,625	3.2	-----	----	625	.1	-----	----	769,985	100
Ga.	1,500	25.0	1,500	25.0	1,500	25.0	-----	----	1,500	25.0	-----	----	6,000	100
Fla.	1,250	25.0	1,250	25.0	1,250	25.0	-----	----	1,250	25.0	-----	----	5,000	100
Ala.	500	25.0	500	25.0	500	25.0	-----	----	500	25.0	-----	----	2,000	100
La.	500	25.0	500	25.0	500	25.0	-----	----	500	25.0	-----	----	2,000	100
N. J.	40	100	-----	----	-----	----	-----	----	-----	----	-----	----	40	100
Misc.	149	100	-----	----	-----	----	-----	----	-----	----	-----	----	149	100
Sub Total	1,748,122	71.5	625,375	25.6	58,375	2.4	8,649	.3	4,375	.2	-----	----	2,444,896	100
Totals	4,011,345	64.7	1,819,703	29.4	168,648	2.7	35,286	.6	4,875	.1	154,873	2.5	6,194,720	100

Conclusions about Spot Markets

The principal markets for spot were located in North Carolina. The central district was the largest supplier of those markets, although sales were almost exclusively in the coastal area. The southern district dealers also sold a slight majority of their spot in the coastal area but they had a relatively large flow (525,000 pounds) into the Piedmont area. These results indicate a healthy market for spot both along the coast and in the inland areas of the state.

The out-of-state market was also good. Demand pulled only 32.2 percent of the 6,194,720 pounds of spot into markets outside the state but that is still a lot of fish and it represents a healthy market.

Markets for Bluefish

Northern District

In-State Markets. The northern district dealers handled 1,582,000 pounds of bluefish (see Table 4-17). Of that total, 261,108 pounds or 16.5 percent was sold inside North Carolina. Coastal area sales of 255,785 pounds far outpaced the 5,323 pounds sold in the Piedmont. In the coastal area a majority of 71 percent of the market was direct retail sales by the dealers to final consumers. Coastal wholesalers and distributors purchased 25.6 percent and retail fish markets 2.2 percent.

The 5,323 pounds of bluefish sold in the Piedmont area went principally to wholesalers and distributors (79.8 percent). Nominal amounts went to retail fish markets(740 pounds) and restaurants (329 pounds).

Viewing the in-state market for the northern district as a whole, direct retail sales to consumers encompassed 69.5 percent of in-state sales of bluefish. Wholesalers and distributors purchased 26.7 percent for the lion's share of that product not sold directly to consumers.

Out-of-State Markets. Out-of-state sales of bluefish by the northern district dealers totaled 1,321,092 pounds (see Table 4-17). Virtually 100 percent of that total was sold to wholesalers and distributors in the states indicated in the table. The only other sale was 164 pounds one dealer indicated that he sold to a restaurant in Virginia.

Central District

In-State Markets. The in-state markets for bluefish from this district were also predominantly along the coast. Of the 147,650 pounds sold in-state, 140,900 were sold in the coastal area (see Table 4-18). Wholesalers and distributors purchased 94.9 percent of that total. Restaurants were the second largest customer purchasing 3,375 pounds or 2.4 percent of the total coastal area sales.

The Piedmont area received 6,750 pounds of bluefish from the northern district dealers. Fifty percent of that total went to wholesalers and distributors. The balance was shared equally by retail fish markets, supermarkets, and restaurants.

4-17

Markets for Bluefish in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	65,460	25.6	5,683	2.2	1,500	.6	1,642	.641	-----	----	181,500	71.0	255,785	100
Piedmont	4,244	79.8	750	14.0	-----	----	329	6.2	-----	----	-----	----	5,323	100
Sub Total	69,704	26.7	6,433	2.5	1,500	.574	1,971	.8	-----	----	181,500	69.5	261,108	100
Out of State														
Va.	135,275	99.9	-----	----	-----	----	164	.121	-----	----	-----	----	135,439	100
Md.	306,334	100	-----	----	-----	----	-----	----	-----	----	-----	----	306,334	100
Penn.	1,500	100	-----	----	-----	----	-----	----	-----	----	-----	----	1,500	100
N. Y.	853,539	100	-----	----	-----	----	-----	----	-----	----	-----	----	853,539	100
S. C.	4,935	100	-----	----	-----	----	-----	----	-----	----	-----	----	4,935	100
N. J.	19,180	100	-----	----	-----	----	-----	----	-----	----	-----	----	19,180	100
Misc.	165	100	-----	----	-----	----	-----	----	-----	----	-----	----	165	100
Sub Total	1,320,928	99.9	-----	----	-----	----	164	.012	----	----	-----	----	1,321,092	100
Totals	1,390,632	87.9	6,433	.406	1,500	.1	2,135	.134	-----	----	181,500	11.5	1,582,200	100

Table 4-18

Markets for Bluefish in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	133,775	94.9	1,875	1.3	1,125	.8	3,375	2.4	750	.6	-----	----	140,900	100
Piedmont	3,375	50.0	1,125	16.6	1,125	16.7	1,125	16.7	-----	----	-----	----	6,750	100
Sub Total	137,150	92.9	3,000	2.03	2,250	1.5	4,500	3.0	750	.6	-----	----	147,650	100
Out of State														
Va.	73,200	97.8	1,500	2.0	-----	----	150	.2	-----	----	-----	----	74,850	100
Md.	69,150	100	-----	----	-----	----	-----	----	-----	----	-----	----	69,150	100
Penn.	103,850	100	-----	----	-----	----	-----	----	-----	----	-----	----	103,850	100
N. Y.	53,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	53,000	100
S. C.	1,087	65.8	188	11.4	188	11.4	188	11.4	-----	----	-----	----	1,651	100
Ga.	450	25.0	450	25.0	450	25.0	450	25.0	-----	----	-----	----	1,800	100
Fla.	375	25.0	375	25.0	375	25.0	375	25.0	-----	----	-----	----	1,500	100
Ala.	150	25.0	150	25.0	150	25.0	150	25.0	-----	----	-----	----	600	100
La.	150	25.0	150	25.0	150	25.0	150	25.0	-----	----	-----	----	600	100
Sub Total	301,412	98.2	2,813	1.0	1,313	.427	1,463	.476	-----	----	-----	----	307,001	100
Totals	438,562	96.5	5,813	1.3	3,563	.8	5,963	1.3	750	.164	-----	----	454,651	100

The central district's in-state markets consisted primarily of wholesalers and distributors. That market received 92.9 percent of the bluefish sold in North Carolina by these dealers.

Out-of-State Markets. The majority of the central district's bluefish was sold out-of-state. As in the case of the in-state market, wholesalers and distributors were the major market with 98.2 percent of the 307,001 pounds sold out-of-state.

Southern District

In-State Markets. The southern district dealers handled only 36,386 pounds of bluefish (see Table 4-19). Of that total, 29,886 pounds were sold inside North Carolina. The market was almost evenly divided between coastal and Piedmont area sales. The markets, however, were different.

In the coastal area retail fish markets received 45.2 percent and wholesalers and distributors 38.7 percent of the 13,936 pounds shipped. The balance of 16.14 percent went to supermarkets. The Piedmont area sales of 15,950 pounds went principally to retail fish markets (90.8 percent).

Out-of-State Markets. The out-of-state markets received 6,500 pounds of bluefish from the southern district. The majority of that went to retail fish markets (57.7 percent) and supermarkets (11.5 percent) in South Carolina. The balance of 2,000 pounds went to wholesalers and distributors in Virginia.

Aggregate State Data

The aggregate state data for bluefish are presented in Table 4-20. These data indicate that with the state the major markets for this species were wholesalers and distributors (48.6 percent) and direct retail sales to consumers (41.2 percent). Retail fish markets received some of the product but that amounted to only 30,208 pounds or 6.9 percent. A total of only 438,644 pounds of bluefish were sold in North Carolina by the dealers surveyed.

Out-of-state markets were much more concentrated. Wholesalers and distributors purchased 99.4 percent of the 1,634,593 pounds of bluefish sold outside North Carolina.

Table 4-19

Markets for Bluefish in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	5,386	38.7	6,300	45.2	2,250	16.1	-----	----	-----	----	-----	----	13,936	100
Piedmont	975	6.1	14,475	90.8	500	3.1	-----	----	-----	----	-----	----	15,950	100
Sub Total	6,361	21.3	20,775	69.5	2,750	9.2	-----	----	-----	----	-----	----	29,886	100
Out of State														
Va.	2,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	2,000	100
S. C.	-----	----	3,750	83.3	750	16.7	-----	----	-----	----	-----	----	4,500	100
Sub Total	2,000	30.8	3,750	57.7	750	11.5	-----	----	-----	----	-----	----	6,500	100
Totals	8,361	23.0	24,525	67.4	3,500	9.6	-----	----	-----	----	-----	----	36,386	100

Table 4-20

Markets for Bluefish in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	204,621	49.8	13,858	3.4	4,875	1.2	5,017	1.2	750	.2	181,500	44.2	410,621	100
Piedmont	8,594	30.6	16,350	58.3	1,625	5.7	1,454	5.1	-----	----	-----	----	28,023	100
Sub Total	213,215	48.6	30,208	6.9	6,500	1.5	6,471	1.5	750	.2	181,500	41.2	438,644	100
Out of State														
Va.	210,475	99.1	1,500	.706	-----	----	314	.2	-----	----	-----	----	212,289	100
Md.	375,484	100	-----	----	-----	----	-----	----	-----	----	-----	----	375,484	100
Penn.	105,350	100	-----	----	-----	----	-----	----	-----	----	-----	----	105,350	100
N. Y.	906,539	100	-----	----	-----	----	-----	-----	-----	----	------	----	906,539	100
S. C.	6,022	54.3	3,938	35.5	938	8.5	188	1.7	-----	----	-----	----	11,086	100
Ga.	450	25.0	450	25.0	450	25.0	450	25.0	-----	----	-----	----	1,800	100
Fla.	375	25.0	375	25.0	375	25.0	375	25.0	-----	----	-----	----	1,500	100
Ala.	150	25.0	150	25.0	150	25.0	150	25.0	-----	----	-----	----	600	100
La.	150	25.0	150	25.0	150	25.0	150	25.0	-----	----	-----	----	600	100
N. J.	19,180	100	-----	----	-----	----	-----	----	-----	----	-----	----	19,180	100
Misc.	165	100	-----	----	-----	----	-----	----	-----	----	-----	----	165	100
Sub Total	1,624,340	99.4	6,563	.401	2,063	.126	1,627	,09	-----	----	-----	----	1,634,593	100
Totals	1,837,555	88.6	36,771	1.8	8,563	.413	8,098	.390	750	.1	181,500	8.8	2,073,237	100

Conclusions About the Bluefish Markets

In contrast to the other species studied, the bluefish market was primarily an out-of-state market. Of the 2,073,237 pounds handled, 78.6 percent moved to out-of-state purchasers. All three districts were similar on this point. The principal out-of-state market was wholesalers and distributors.

As in the case of the other species studied, direct retail sales by the dealers played a role in the distribution pattern for in-state sales. Proportionally more bluefish were sold in this market, however, than was the case for the other species.

It is difficult to tell from the data whether the limited catch of bluefish was a function of non-availability of the species or overall weakness in the market. Discussions with the dealers, however, revealed that the prices paid to fishermen for bluefish were lower than those paid for other species due to low aggregate consumer demand and extra cost in handling.

Bluefish spoils easily. As a result many wholesalers and distributors will not accept shipments unless the fish have been eviscerated, thus requiring considerable work and extra expense for a product that usually brings a lower price. Several dealers commented that they only handled bluefish when they had to and that they handled those reluctantly.

Whether or not this market will expand is a big question. The consumer typically wants delicately flavored fish such as flounder. Bluefish is a strong flavored fish. Consumer demand directly influences dealer and fishermen's actions, therefore, the ultimate answer would appear to lie in the marketers' ability or desire to shift consumer expectations and demands to encompass the stronger flavored species of fish such as bluefish.

Markets for Mullet

Northern District

In-State Markets. The in-state market for mullet absorbed only 19.7 percent of the total of 536,775 pounds reported by the northern district dealers surveyed (see Table 4-21). The two main markets were direct retail sales by the dealer (71.3 percent) and sales to coastal area wholesalers and distributors (25.8 percent). The Piedmont area markets received only 495 pounds of mullet and were therefore not an important factor in the northern district's sales.

Out-of-State Markets. The out-of-state market absorbed 80.2 percent of the northern district's landings of mullet. Those sales were almost exclusively to wholesalers and distributors. In general, the northern district dealers handled very few mullet with the majority of those that were handled going out-of-state.

Central District

In-State Markets. The central district handled more mullet than did the northern district. Of the 361,978 pounds reported, 76.8 percent of 277,828 pounds were sold in-state (see Table 4-22). Almost all of the in-state sales were made in the coastal zone with wholesalers and distributors purchasing 96.8 percent.

Out-of-State Markets. The out-of-state markets absorbed 84,150 pounds of mullet for 23.3 percent of the total volume. A majority of 95.3 percent of that total was sold to wholesalers and distributors.

Southern District

In-State Sales. The southern district dealers handled the majority of the mullet distributed within North Carolina. Their in-state shipments totaled 679,635 pounds and represented 74.3 percent of the total 914,635 pounds handled in that district (see Table 4-23). Sales in the coastal area represented 33.8 percent of the in-state volume, while 66.2 percent was shipped into the Piedmont area market.

A total of 62.1 percent of the coastal sales went to retail fish markets, while 7 percent was sold at retail by the dealers themselves. The Piedmont area sales also went to retail fish markets. The Piedmont area sales also went to retail fish markets. Of the 450,000 pounds of mullet shipped into the Piedmont area, 92.2 percent went to retail fish markets.

Aggregate State Data

The combined data for mullet sales by three districts appears in Table 4-24. Those data indicate that the in-state market represented the majority of the sales of fresh iced mullet. The 1,063,163 pounds sold in North Carolina represented 58.6 percent of all sales of mullet by the dealers contacted. The major markets for those sales were retail fish markets (53.2 percent) and wholesalers and distributors (33.5 percent). The coastal dealers also sold 91,154 pounds (8.6 percent) directly to final consumers in the coastal zone.

The out-of-state markets received 750,225 pounds of mullet. Wholesalers and distributors represented the major market with 70.8 percent of the sales. They were followed by retail fish markets (predominantly in South Carolina) which received 27.9 percent of the out-of-state shipments.

Conclusions About the Mullet Markets

The data on mullet indicate that the southern district is the major handler of that species. Those dealers cater primarily to coastal and Piedmont markets with retail fish markets as the major customer. The central district also serves primarily an in-state market. Its customers, however, are predominantly coastal area wholesalers and distributors with less than 4 percent going to other types of customers. The northern district, as with most other species, sells primarily to out-of-state markets.

Mullet does not appear to be a major factor in the North Carolina seafood catch. It is not a particularly popular fish with consumers, although some types of mullet are used as bait in recreational fishing. The lack of popularity makes it a species that is priced low and therefore does not attract commercial fishermen or dealers.

Table 4-21

Markets for Mullet in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N.C.														
Coastal	27,105	25.8	2,540	100	----	---	560	.532	----	---	75,000	71.3	105,205	19.6
Piedmont	297	60	----	---	----	---	198	40	----	---	----	---	495	.09
Sub Total	27,402	25.92	2,540	2.40	----	---	758	.717	----	---	75,000	71	105,700	19.7
Out of State														
Va.	36,060	99.8	----	---	----	---	99	.273	----	---	----	---	36,159	6.7
Md.	130,098	100	----	---	----	---	----	---	----	---	----	---	130,098	6.7
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N.Y.	259,649	100	----	---	----	---	----	---	----	---	----	---	259,649	48.4
S.C.	2,970	100	----	---	----	---	----	---	----	---	----	---	2,970	.5
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N.J.	2,100	100	----	---	----	---	----	---	----	---	----	---	2,100	.4
Misc.	99	100	----	---	----	---	----	---	----	---	----	---	99	.02
Sub Total	430,976	100	----	---	----	---	99	.022	----	---	----	---	431,075	80.2
Total	458,378	85.4	2,540	.473	----		857	.159	----		75,000	14	536,775	

Table 4-22

Markets for Mullet in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N.C.														
Coastal	265,528	96.8	4,150	1.6	750	.273	3,900	1.42	----	---	----	---	274,328	75.8
Piedmont	1,250	35.71	750	21.42	750	21.42	750	21.42	----	---	----	---	3,500	.97
Sub Total	266,778	96.02	4,900	1.7	1,500	.6	4,650	1.7	----	---	----	---	277,828	76.77
Out of State														
Va.	24,250	97.6	500	2.01	----	---	100	.402	----	---	----	---	24,850	6.9
Md.	7,450	100	----	---	----	---	----	---	----	---	----	---	7,450	2.06
Penn.	22,550	100	----	---	----	---	----	---	----	---	----	---	22,550	6.2
S.C.	24,925	98.51	125	.5	125	.5	125	.5	----	---	----	---	25,300	7.0
Ga.	300	25	300	25	300	25	300	25	----	---	----	---	1,200	.33
Fla.	500	25	500	25	500	25	500	25	----	---	----	---	3,000	.55
Ala.	100	25	100	25	100	25	100	25	----	---	----	---	400	.11
La.	100	25	100	25	100	25	100	25	----	---	----	---	400	.11
Sub Total	80,175	95.3	1,625	2	1,125	1.33	1,225	1.455	----	---	----	---	84,150	23.26
Totals	346,953	95.9	6,525	1.80	2,625	.725	5,875	1.62	----		----		361,978	

Table 4-23

Markets for Mullet in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N.C.														
Coastal	32,317	14.1	142,500	62.1	38,659	16.8	----	---	----	---	16,159	7.03	229,635	25.1
Piedmont	30,000	6.7	415,000	92.2	5,000	1.11	----	---	----	---	----	---	450,000	49.2
Sub Total	62,317	9.16	557,500	82.02	43,659	6.5	----	---	----	---	16,159	2.4	679,635	74.3
Out of State									----	---	----			
Va.	20,000	100	----	---	----	---	----	---	----	---	----	---	20,000	2.2
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N.Y.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
S.C.	----	---	207,500	96.51	7,500	3.5	----	---	----	---	----	---	215,000	23.5
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	20,000	8.510	207,500	88.3	7,500	3.19	----	---	----	---	----	---	235,000	25.7
Totals	82,317	9	765,000	83.63	51,159	5.6	----		----		16,159	1.8	914,635	

Table 4-24

Markets for Mullet in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N.C.														
Coastal	324,950	53.34	149,190	25.5	39,409	6.5	4,460	.732	----	---	91,159	15	609,168	33.6
Piedmont	31,547	6.94	415,750	91.6	5,750	1.3	948	.208	----	---	----	---	453,995	25.0
Sub Total	356,497	33.53	564,940	53.2	45,159	4.24	5,408	0.5	----	---	91,159	8.6	1,063,163	100
Out of State														
Va.	80,310	99.13	500	.7	----	---	199	.245	----	---	----	---	81,009	4.5
Md.	137,548	100	----	---	----	---	----	---	----	---	----	---	137,548	7.6
Penn.	22,550	100	----	---	----	---	----	---	----	---	----	---	22,540	1.2
N.Y.	259,649	100	----	---	----	---	----	---	----	---	----	---	259,649	14.3
S.C.	27,895	11.5	207,625	85.34	7,625	3.13	125	.1	----	---	----	---	243,270	13.4
Ga.	300	25	300	25	300	25	300	25	----	---	----	---	1,200	.06
Fla.	500	25	500	25	500	25	500	25	----	---	----	---	2,000	.1
Ala.	100	25	100	25	100	25	100	25	----	---	----	---	400	.02
La.	100	25	100	25	100	25	100	25	----	---	----	---	400	.02
N.J.	2,100	100	----	---	----	---	----	---	----	---	----	---	2,100	.1
Misc.	99	100	----	---	----	---	----	---	----	---	----	---	99	.005
Sub Total	531,151	70.8	209,125	27.9	8,625	1.14	1,324	.2	----	---	----	---	750,225	41.3
Totals	887,648	48.94	774,065	42.7	53,784	2.3	6,732	5.02	----	---	91,159	5.02	1,813,388	

Markets for Shrimp*

Northern District

In-State Markets. The northern district sold 86,220 pounds of shrimp in North Carolina of which 79,980 was sold in the coastal area (see Table 4-25). A majority of 65.8 percent of that shrimp was sold at retail directly to comsumers and 25.3 percent was sold to wholesalers and distributors. Retail fish markets and supermarkets were also important customers with 4,000 pounds (5 percent) and 2,080 pounds (2.6 percent) each.

Sales in the Piedmont area amounted to 6,240 pounds with 83.3 percent of that going to wholesalers and distributors. Restaurants purchased the balance of 1,040 pounds for 16.7 percent.

Out-of-State Markets. The northern district dealers sold 197,000 pounds of shrimp outside North Carolina. Two markets absorbed all these sales. Wholesalers and distributors purchased 62,773 pounds for 31.5 percent of the sales. Seafood processors in Florida bought the remaining 135,000 pounds representing 68.5 percent of the out-of-state sales.

Central District

In-State Markets. The central district dealers were by far the largest dealers in shrimp. They handled 3,487,000 pounds of shrimp of which a majority of 1,828,328 was sold inside North Carolina (see Table 4-26). The coastal area purchased 1,394,396 pounds with a majority of 849,968 pounds (61 percent) sold to restaurants. Wholesalers and distributors were an important market with purchases of 281,843 pounds (20.2 percent). As in the case of all species studied, direct retail sales to consumers was a good market for the central district with that market absorbing 155,244 pounds (11.1 percetn) of these dealers sales in the coastal zone.

Piedmont area markets purchased 433,932 pounds of shrimp of which 132,682 pounds (30.6 percent) went to wholesalers and distributors. Restaurants and supermarkets were important customers with 103,750 pounds (23 percent) each followed by retail fish markets with 93,750 pounds (21.6 percent).

Out-of-State Markets. The shrimp sold outside North Carolina totaled 1,658,673 which was just slightly less than the in-state sales. The markets, however, were very different. Seafood processors represented

*All shrimp are reported as weights with heads removed.

Table 4-25

Markets for Shrimp in 1974:

Northern District*

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	20,200	25.3	4,000	5.0	2,080	2.6	1,040	1.3	-----	----	52,660	65.8	79,980	100
Piedmont	5,200	83.3	-----	----	-----	----	1,040	16.7	-----	----	-----	----	6,240	100
Sub Total	25,400	29.5	4,000	4.6	2,080	2.4	2,080	2.4	-----	----	52,660	61.1	86,220	100
Out of State														
Md.	693	100	-----	----	-----	----	-----	----	-----	----	-----	----	693	100
Penn.	693	100	-----	----	-----	----	-----	----	-----	----	-----	----	693	100
N. Y.	60,694	100	-----	----	-----	----	-----	----	-----	----	-----	----	60,694	100
Fla.	-----	----	-----	----	-----	----	-----	----	135,000	100	-----	----	135,000	1100
Sub Total	62,773	31.5	-----	----	-----	----	-----	----	135,000	68.5	-----	----	197,080	100
Totals	87,480	30.9	4,000	1.4	2,080	.7	2,080	.7	135,000	47.7	52,660	18.6	283,300	100

*weights with heads removed

Table 4-26

Markets for Shrimp in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	281,843	20.2	107,341	7.7	-----	--	849,968	61.0	-----	----	155,244	11.1	1,394,396	100
Piedmont	132,682	30.6	93,750	21.6	103,750	23.9	103,750	23.9	-----	----	-----	----	433,932	100
Sub Total	414,525	22.7	201,091	11.0	103,750	5.7	953,718	52.1	-----	----	155,244	8.5	1,828,328	100
Out of State														
Va.	225,774	68.6	-----	----	20,000	6.1	57,000	17.3	26,304	8.0	-----	----	329,078	100
Md.	37,500	44.1	-----	----	37,500	44.1	10,000	11.8	----	----	-----	----	85.000	100
N. Y.	113,304	100	-----	----	-----	----	-----	----	-----	----	-----	----	113,304	100
S. C.	14,500	17.6	-----	----	-----	----	30,000	36.4	37,900	46.0	-----	----	82,400	100
Ga.	62,500	27.4	-----	----	-----	----	60,000	26.3	105,360	46.3	-----	----	227,860	100
N. J.	60,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	60,000	100
Wash., D. C.	24,120	100	-----	----	-----	----	-----	----	-----	----	-----	----	24,120	100
Fla.	-----	----	-----	----	-----	----	-----	----	736,911	100	-----	----	736,911	100
Sub Total	537,698	32.4	-----	----	57,500	3.5	157,000	9.5	906,475	54.6	-----	----	1,658,673	100
Totals	952,223	27.3	201,091	5.8	161,250	4.6	1,110,718	31.9	906,475	26.0	155,244	4.4	3,487,001	100

*weights with heads removed

the major out-of-state market with 906,475 pounds for 54.5 percent of sales. Wholesalers and distributors were a more important market than they were for in-state sales with 537,698 pounds (32.4 percent). The sales to the restaurant market were also fairly significant. A total of 157,000 (9.5 percent) of the shrimp were sold to restaurants outside North Carolina. Supermarket sales were a representative 57,500 pounds but that was only 3.5 percent of the out-of-state sales.

Southern District

In-State Markets. This district handled 544,094 pounds of shrimp with a majority of 481,594 pounds going into markets within North Carolina (see Table 4-27). The coastal zone markets received less than one half of the in-state sales. Of the 203,594 pounds sold in that area, retail fish markets purchased 90,348 pounds (44.4 percent). Restaurants were also an important market with purchases totaling 60,623 pounds (29,8 percent). Direct retail sales to consumers by the dealers as for almost all other species consumed a significant proportion of sales. That market totaled 52,623 pounds for 25.8 percent of the coastal area sales.

The Piedmont market received 278,000 pounds of shrimp. Of that total, 144,500 pounds (52 percent) went to wholesalers and distributors and 126,750 pounds (45.6 percent) to retail fish markets. The inland markets for shrimp for this district were consistent with the patterns followed for the other species studied.

Out-of-State Markets. Markets outside North Carolina received only 62,500 pounds of shrimp from the southern district's dealers. The majority of 33,750 pounds (54 percent) went to retail fish markets. Supermarkets were also important with purchases of 6,750 pounds (15.2 percent). Sales to wholesalers and distributors absorbed the balance of 4,000 pounds (9 percent).

Aggregate State Data

Summary data combining the sales of all three districts appear in Table 4-28. Those data indicate that in terms of in-state sales, the restaurant market was the most important market for shrimp. That market consumed 1,018,671 pounds of shrimp which represented 42.6 percent of in-state sales. Wholesalers and distributors purchased 584,425 pounds (23.4 percent). Retail fish markets were close behind the wholesalers and distributors with 422,189 pounds (18 percent).

The out-of-state markets for the state as a whole were dominated by seafood processors. That market purchased 1,041,475 pounds of shrimp for 54.3 percent of the out-of-state sales. Wholesalers and distributors in other states received 621,778 pounds representing 32.4 percent of sales. The restaurant market with purchases totaling 157,000 pounds (8.2 percent) was also an important market.

Table 4-27

Markets for Shrimp in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	-----	----	90,348	44.4	-----	----	60,623	29.8	-----	----	52,623	25.8	203,594	100
Piedmont	144,500	52.0	126,750	45.6	4,500	1.6	2,250	.8	-----	----	-----	----	278,000	100
Out of State														
Va.	18,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	18,000	100
S. C.	4,000	9.0	33,750	75.8	6,750	15.2	-----	-----	-----	----	-----	----	44,500	100
Sub Total	22,000	35.2	33,750	54.0	6,750	10.8	-----	----	-----	----	-----	----	62,500	100
Total	166,500	30.6	250,848	46.1	11,250	2.1	62,873	11.5	-----	----	52,623	9.7	544,094	100

*weights with heads removed

Table 4-28

Markets for Shrimp in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	302,043	18.0	201,689	12.0	2,080	.1	911,631	54.3	-----	----	260,527	15.6	1,677,970	100
Piedmont	282,382	39.3	220,500	30.7	108,250	15.1	107,040	14.9	-----	----	-----	----	718,172	100
Out of State														
Va.	243,774	70.2	-----	---	20,000	5.8	57,000	16.4	26,304	7.6	-----	----	347,078	100
Md.	38,193	44.6	-----	----	37,500	43.7	10,000	11.7	-----	----	-----	----	85,693	100
Penn.	693	100	-----	----	-----	----	-----	----	-----	----	-----	----	693	100
N. Y.	173,998	100	-----	----	-----	----	-----	----	-----	----	-----	----	173,998	100
S. C.	18,500	14.4	33,750	26.8	6,750	5.0	30,000	23.8	37,900	30.0	-----	----	125,900	100
Ga.	62,500	27.4	-----	----	-----	----	60,000	26.3	105,360	46.3	-----	----	227,860	100
Fla.	-----	----	-----	----	-----	----	-----	----	871,911	100	-----	----	871,911	100
N. J.	60,000	100	-----	----	-----	----	-----	----	-----	----	-----	----	60,000	100
Wash., D. C.	24,120	100	-----	----	-----	----	-----	----	-----	----	-----	----	24,120	100
Sub Total	621,778	32.4	33,750	1.8	64,250	3.3	157,000	8.2	1041475	54.3	-----	----	1,917,253	100
Totals	1,206,203	27.9	455,939	10.6	174,580	4.0	1,175,671	27.2	1041475	24.2	260,527	6.1	4,313,395	100

*weights with heads removed

Conclusions About Shrimp Markets

Shrimp follow the prices which in turn are determined by consumer demand. In the northern areas of the United States the consumers like large shrimp and will pay high prices to satisfy that demand. As a result the larger shrimp move into that market area. Small shrimp in contrast, are in general scorned by all consumers. As a result they bring lower prices, a phenomena that makes this size of shrimp attractive to the processors. The processors buy all the small shrimp they can get and still wind up importing shrimp from outside the United States. What they do is take the small shrimp, add lots of breading to make them look large, and then sell them to consumers who want large breaded shrimp. Lest this be taken as an unfair act, please note that the consumer seems perfectly happy with this arrangement as evidenced by their continuing high and increasing demand for the breaded shrimp products.

The medium size shrimp tend to go into the North Carolina markets. That size shrimp sells at a price which North Carolinians seem to be willing to pay. Since this market will not pay the higher prices for the larger shrimp, it gets only what is not in demand elsewhere.

The shrimp markets represent the financially most lucrative market for the North Carolina fishing industry. Shrimp has always been and probably will always be a high consumer demand item. When in short supply the prices soar. In periods of seemingly excess supply, however, prices may drop very low. Given the increases in available freezing capacity which have been taking place, these extremes in prices at the dealer level may settle out somewhat at some future point.

The problem is and will remain one of deciding when to freeze. The dealer does not know that the sudden increase in supplies may not continue for long periods leaving him with large quantities of frozen shrimp for which he paid high prices. Alternatively, if he waits, then supplies may suddenly become short leaving him without any frozen shrimp which he could sell in the more lucrative post season market.

Mother nature is in charge as always. Until we can accurately predict the level of supplies that will be available, the shrimp market will remain a risky as well as potentially rewarding phenomena for both the fisherman and the dealers.

APPENDIX

SUMMARY TABLES ON DISTRIBUTION

OF STUDY SPECIES

Table A-1

Distribution of Flounder in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	230,615	4.5	27,383	97.3	1,500	100	8,262	75.0	----	---	24,000	100	291,760	5.6
Piedmont	86,506	1.7	750	2.7	----	---	1,837	16.7	----	---	----	---	89,093	1.7
Sub Total	317,121	6.2	28,133	100	1,500	100	10,099	91.7	----	---	24,000	100	380,853	7.3
Out of State														
Va.	1,402,905	27.4	----	---	----	---	918	8.3	----	---	----	---	1,403,823	27.0
Md.	278,877	5.4	----	---	----	---	----	---	----	---	----	---	278,877	5.4
Penn.	13,350	.3	----	---	----	---	----	---	----	---	----	---	13,350	.2
N. Y.	915,280	17.8	----	---	----	---	----	---	----	---	----	---	915,280	17.6
S. C.	2,027,555	39.5	----	---	----	---	----	---	----	---	----	---	2,027,555	39.0
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	54,715	1.06	----	---	----	---	----	---	----	---	----	---	54,715	1.05
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. J.	117,450	2.3	----	---	----	---	----	---	----	---	----	---	117,450	2.3
Misc.	919	.02	----	---	----	---	----	---	----	---	----	---	919	.02
Sub Total	4,811,051	93.8	----	---	----	---	918	8.3	----	---	----	---	4,811,969	92.6
Totals	5,128,172		28,133		1,500		11,017		----		24,000		5,192,822	

Table A-2

Distribution of Flounder in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,265,100	47.2	118,500	45.0	60,000	31.6	4,550,500	96.7	----	---	2,105,100	100	9,099,100	75.4
Piedmont	230,000	4.8	60,000	22.8	60,000	31.6	76,000	1.6	----	---	----	---	426,000	3.5
Sub Total	2,495,100	52.0	178,500	67.8	120,000	63.2	4,626,500	98.3	----	---	2,105,100	100	9,525,100	78.9
Out of State														
Va.	785,500	16.4	15,000	5.7	----	---	8,000	.17	----	---	----	---	808,500	6.7
Md.	522,000	10.9	-----	---	----	---	----	---	----	---	----	---	522,000	4.3
Penn.	181,000	3.8	----	---	----	---	----	---	----	---	----	---	181,000	1.5
N. Y.	377,500	7.8	----	---	----	---	----	---	----	---	----	---	377,500	3.1
S.C.	170,000	3.5	10,000	3.8	10,000	5.3	10,000	.21	----	---	----	---	200,000	1.6
Ga.	24,000	.5	24,000	9.1	24,000	12.6	24,000	.5	----	---	----	---	96,000	.8
Fla.	172,000	3.6	20,000	7.6	20,000	10.5	20,000	.42	----	---	----	---	232,000	1.9
Ala.	8,000	.2	8,000	3.0	8,000	4.2	8,000	.17	----	---	----	---	32,000	.3
La.	8,000	.2	8,000	3.0	8,000	4.2	8,000	.17	----	---	----	---	32,000	.3
N. J.	60,000	1.2	----	---	----	---	----	---	----	---	----	---	60,000	.5
Sub Total	2,308,000	48.1	85,000	32.2	70,000	36.8	78,000	1.7	----	---	----	---	2,541,000	21.0
Totals	4,803,100		263,500		190,000		4,704,500		----		2,105,000		12,066,100	

Table A-3

Distribution of Flounder in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	11,850	6.1	987,500	21.0	67,500	6.1	308,079	100	----	---	1,077	100	1,376,006	21.8
Piedmont	90,000	46.4	1,595,000	34.0	15,000	1.4	----	---	----	---	----	---	1,700,000	27.0
Sub Total	101,850	52.5	2,582,500	55.0	82,500	7.5	308,079	100	----	---	1,077	100	3,076,006	48.8
Out of State														
Va.	60,000	30.9	----	---	----	---	----	---	----	---	----	---	60,000	.95
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn.	18,852	9.7	----	---	----	---	----	---	----	---	----	---	18,852	.3
N. Y.	13,466	6.9	----	---	----	---	----	---	----	---	----	---	13,466	.2
S. C.	----	---	2,112,500	45.0	1022,500	92.5	----	---	----	---	----	---	3,135,000	49.7
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	92,318	47.5	2,112,500	45.0	1022,500	92.5	----	---	----	---	----	---	3,227,318	51.15
Totals	194,168		4,695,000		1105,000		308,079		----		1,077		6,303,324	

Table A-4

Distribution of Flounder in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	
N.C.														
Coastal	2,507,565	24.7	1,133,383	22.7	129,000	9.9	4,866,841	96.8	----	---	2,130,177	100	10,766,966	45.6
Piedmont	406,506	4.0	1,655,750	33.2	75,000	5.7	77,837	1.5	----	---	----	---	2,215,093	9.4
Sub Total	2,914,071	28.7	2,789,133	55.9	204,000	15.6	4,944,678	98.3	----	---	2,130,177	100	12,982,059	55.0
Out-of-State														
Va.	2,248,405	22.2	15,000	.30	----	---	8,918	.17	----	---	----	---	2,272,323	9.6
Md.	800,877	7.9	----	---	----	---	----	---	----	---	----	---	800,877	3.3
Penn.	213,202	2.1	----	---	----	---	----	---	----	---	----	---	213,202	.9
N.Y.	1,306,246	12.9	----	---	----	---	----	---	----	---	----	---	1,306,246	5.5
S.C.	2,197,555	21.7	2,122,500	42.5	1,032,500	79.6	10,000	.19	----	---	----	---	5,362,555	22.8
Ga.	24,000	.23	24,000	.48	24,000	1.8	24,000	.47	----	---	----	---	96,000	.4
Fla.	226,715	2.2	20,000	.40	20,000	1.5	20,000	.39	----	---	----	---	286,715	1.2
Ala.	8,000	.07	8,000	.16	8,000	.6	8,000	.15	----	---	----	---	32,000	.1
La.	8,000	.07	8,000	.16	8,000	.6	8,000	.15	----	---	----	---	32,000	.1
N.J.	177,450	1.7	----	---	----	---	----	---	----	---	----	---	177,450	.7
Misc.	919	.009	----	---	----	---	----	---	----	---	----	---	919	.003
Sub Total	7,211,369	140379	7,184,133	44.0	1092,500	84.1	78,918	1.52	----	---	----	---	10,580,287	44.6
Totals	10,125,440		4,986,633		1296,500		5,023,596		----		2,130,177		23,562,346	

Table A-5

Distribution of Gray Trout in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	693,950	28.5	55,513	95.5	5,200	100	13,142	68.8	----	---	155,200	100	923,005	34.6
Piedmont	266,966	11.0	2,600	4.4	----	---	3,977	20.8	----	---	----	---	273,543	10.2
Sub Total	960,916	39.5	58,113	99.9	5,200	100	17,119	89.6	----	---	155,200	100	1,196,548	44.8
Out of State														
Va.	456,595	18.8	-----	---	----	---	1,988	10.4	----	---	----	---	458,583	17.2
Md.	284,111	11.7	----	---	----	---	----	---	----	---	----	---	284,111	10.6
Penn.	1,733	.07	----	---	----	---	----	---	----	---	----	---	1,733	.06
N. Y.	657,871	27.0	----	---	----	---	----	---	----	---	----	---	657,871	24.6
S. C.	59,655	2.4	----	---	----	---	----	---	----	---	----	---	59,655	2.2
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	-----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. J.	8,460	.35	----	---	----	---	----	---	----	---	----	---	8,460	.31
Misc.	1,989	.08	----	---	----	---	----	---	----	---	----	---	1,989	.07
Sub Total	1,470,414	60.4	----	---	----	---	1,988	10.4	----	---	----	---	1,472,402	55.0
Totals	2,431,330		58,113		5,200		19,107		----		155,200		2,668,950	

Table A-6

Distribution of Gray Trout in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	1,002,650	79	4,706,750	99.8	1,500	44.1	16,500	73.8	1,750	100	65,000	100	5,794,150	95.4
Piedmont	36,750	2.9	1,500	.03	1,500	44.1	1,500	6.7	----	---	----	---	41,250	.68
Sub Total	1,039,400	81.9	4,708,250	99.83	3,000	88.2	18,000	80.5	1,750	100	65,000	100	5,835,400	96.08
Out of State														
Va.	71,050	5.6	3,500	.07	----	---	3,950	17.7	----	---	----	---	78,500	1.3
Md.	27,650	2.2	----	---	----	---	----	---	----	---	----	---	27,650	.45
Penn.	74,250	5.8	----	---	----	---	----	---	----	---	----	---	74,250	1.2
N. Y.	27,000	2.1	----	---	----	---	----	---	----	---	----	---	27,000	.44
S. C.	28,750	2.1	----	---	----	---	----	---	----	---	----	---	28,750	.47
Ga.	600	.05	----	---	----	---	----	---	----	---	----	---	600	.099
Fla.	1,000	.08	----	---	----	---	----	---	----	---	----	---	1,000	.016
Ala.	200	.01	200	.004	200	5.9	200	.9	----	---	----	---	800	.013
La.	200	.01	200	.004	200	5.9	200	.9	----	---	----	---	800	.013
Sub Total	230,700	18.15	3,900	.015	400	11.8	4,350	19.5	----	---	----	---	239,350	4.001
Totals	1,270,100		4,712,150		3,400		22,350		1,750		65,000		6,074,750	

Table A-7

Distribution of Gray Trout in 1974:

Southern District

N. C.	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
Coastal	10,773	30.5	135,000	48.1	23,386	70.0	----	---	----	---	5,386	100	174,545	49.2
Piedmont	8,500	24.1	100,500	35.8	4,000	12.0	----	---	----	---	----	---	113,000	31.9
Sub Total	19,273	54.6	235,500	83.9	27,286	82.0	----	---	----	---	5,386	100	287,545	81.1
Out of State														
Va.	16,000	45.4	----	---	----	---	----	---	----	---	----	---	16,000	4.5
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
S. C.	----	---	45,000	16.0	6,000	18.0	----	---	----	---	----	---	51,000	14.4
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	16,000	45.4	45,000	16.0	6,000	18.0	----	---	----	---	----	---	67,000	18.9
Totals	35,273		280,500		33,386		----		----		5,386		354,545	

Table A-8

Distribution of Gray Trout in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	1,707,373	45.6	4,897,263	96.9	30,086	71.6	29,642	71.5	1,750	100	225,586	100	6,891,700	75.7
Piedmont	312,216	8.3	104,600	2.0	5,500	13.0	5,477	13.2	----	---	----	---	427,793	4.7
Sub Total	2,019,589	53.9	5,001,863	98.9	35,586	84.6	35,119	84.7	1,750	100	225,586	100	7,319,493	80.4
Out of State														
Va.	543,645	14.5	3,500	.06	----	---	5,938	14.3	----	---	----	---	553,083	6.0
Md.	311,761	8.3	----	---	----	---	----	---	----	---	----	---	311,761	3.4
Penn.	75,983	2.0	----	---	----	---	----	---	----	---	----	---	75,983	.8
N.Y.	684,871	18.3	----	---	----	---	----	---	----	---	----	---	684,871	7.5
S.C.	88,405	2.3	45,000	.89	6,000	14.2	----	---	----	---	----	---	139,405	1.5
Ga.	600	.016	----	---	----	---	----	---	----	---	----	---	600	.006
Fla.	1,000	.02	----	---	----	---	----	---	----	---	----	---	1,000	.01
Ala.	200	.005	200	.003	200	.47	200	.48	----	---	----	---	800	.008
La.	200	.005	200	.003	200	.46	200	.48	----	---	----	---	800	.008
N.J.	8,460	.2	----	---	----	---	----	---	----	---	----	---	8,460	.09
Misc.	1,989	.05	----	---	----	---	----	---	----	---	----	---	1,989	.02
Sub Total	1,717,114	45696	48,900	.956	6,400	15.13	6,338	15.26	----	---	----	---	1,778,752	19342
Totals	3,736,703		5,050,763		41,986		41,457		1,750		225,586		9,098,245	

Table A-9

Distribution of Croaker in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C														
Coastal	45,080	4.1	29,508	93.6	4,000	100	7,277	70.5	----	---	79,000	100	164,865	13.5
Piedmont	16,035	1.4	2,000	6.3	----	---	2,023	19.6	----	---	----	---	20,058	1.6
Sub Total	61,115	5.5	31,508	99.9	4,000	100	9,300	90.1	----	---	79,000	100	184,923	15.1
Out of State														
Va.	391,310	35.6	----	---	----	---	1,011	9.8	----	---	----	---	392,321	32.1
Md.	192,402	17.5	----	---	----	---	----	---	----	---	----	---	192,402	15.7
Penn.	51,333	4.6	----	---	----	---	----	---	----	---	----	---	51,333	4.2
N. Y.	363,154	33.1	----	---	----	---	----	---	----	---	----	---	363,154	29.6
S. C.	30,345	2.8	----	---	----	---	----	---	----	---	----	---	30,345	2.5
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. J.	7,490	.68	-----	---	----	---	----	---	----	---	----	---	7,490	.61
Misc.	1,012	.09	----	---	----	---	----	---	----	---	----	---	1,012	.08
Sub Total	1,037,046	94.3	----	---	----	---	1,011	9.8	----	---	----	---	1,038,057	84.8
Totals	1,098,161		31,508		4,000		10,311		----		79,000		1,222,980	

Table A-10

Distribution of Croaker in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,351,050	70.7	101,750	84.4	7,500	2.7	25,500	60.0	1,250	100	8,150	100	2,495,200	66.2
Piedmont	25,000	.75	7,500	6.2	7,500	2.7	7,500	17.5	----	---	----	---	47,500	1.2
Sub Total	2,376,050	71.45	109,250	90.6	15,000	5.4	33,000	77.5	1,250	100	8,150	100	2,542,700	67.4
Out of State														
Va.	94,750	2.8	2,500	2.07	----	---	1,000	2.3	----	---	----	---	98,250	2.6
Md.	276,500	8.3	----	---	----	---	----	---	----	---	----	---	276,500	7.3
Penn.	281,100	8.4	----	---	250,000	91.3	----	---	----	---	----	---	531,100	14.0
N. Y.	83,600	2.5	----	---	----	---	----	---	----	---	----	---	83,600	2.2
S.C.	205,250	6.2	1,250	1.03	1,250	.4	1,250	2.9	----	---	----	---	209,000	5.5
Ga.	3,000	.09	3,000	2.5	3,000	1.09	3,000	7.0	----	---	----	---	12,000	.3
Fla.	2,500	.08	2,500	2.07	2,500	.9	2,500	5.8	----	---	----	---	10,000	.26
Ala.	1,000	.03	1,000	.83	1,000	.4	1,000	2.3	----	---	----	---	4,000	.1
La.	1,000	.03	1,000	.83	1,000	.4	1,000	2.3	----	---	----	---	4,000	.1
Sub Total	948,700	28.43	11,250	9.33	258,750	94.49	9,750	22.6	----	---	----	---	1,228,450	32.36
Totals	3,324,750		120,500		273,750		42,750		1,250		8,150		3,771,150	

Table A-11

Distribution of Croaker in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	13,465	10.0	826,733	22.5	72,000	64.3	----	---	----	---	6,733	100	918,931	23.4
Piedmont	56,000	42.0	928,000	25.2	16,000	14.3	----	---	----	---	----	---	1,000,000	25.5
Sub Total	69,465	52.0	1,754,733	47.7	88,000	78.6	----	---	----	---	6,733	100	1,918,931	48.9
Out of State														
Va.	64,000	48.0	----	---	----	---	----	---	----	---	----	---	64,000	1.6
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
S. C.	----	---	1,920,000	52.2	24,000	21.4	----	---	----	---	----	---	1,944,000	49.5
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	-----	---	----	---	----	---	----	---	----	---	-----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	64,000	48.0	1,920,000	52.2	24,000	21.4	----	---	----	---	----	---	2,008,000	51.1
Totals	133,465		3,674,733		112,000		----		----		6,733		3,926,931	

Table A-12

Distribution of Croaker in 1974

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,409,595	52.8	957,991	25.0	83,500	21.4	32,777	61.7	1,250	100	93,883	100	3,578,996	40.1
Piedmont	97,035	2.1	937,500	24.4	23,500	6.0	9,523	17.9	----	---	----	---	1,067,558	11.9
Sub Total	2,506,630	54.9	1,895,491	49.4	107,000	27.4	42,300	79.6	1,250	100	93,883	100	4,646,554	52.0
Out of State														
Va.	550,060	12.0	2,500	.06	----	---	2,011	3.7	----	---	----	---	554,571	6.2
Md.	468,902	10.2	----	---	----	---	----	---	----	---	----	---	468,902	5.2
Penn.	332,433	7.2	----	---	250,000	64.1	----	---	----	---	----	---	582,433	6.5
N. Y.	446,754	9.8	----	---	----	---	----	---	----	---	----	---	446,754	5.0
S. C.	235,595	5.1	1,921,250	50.2	25,250	6.4	1,250	2.3	----	---	----	---	2,183,345	24.4
Ga.	3,000	.06	3,000	.07	3,000	.7	3,000	5.6	----	---	----	---	12,000	.1
Fla.	2,500	.05	2,500	.06	2,500	.6	2,500	4.7	----	---	----	---	10,000	.1
Ala.	1,000	.02	1,000	.02	1,000	.25	1,000	1.8	----	---	----	---	4,000	.04
La.	1,000	.02	1,000	.02	1,000	.25	1,000	1.8	----	---	----	---	4,000	.04
N. J.	7,490	.16	----	---	----	---	----	---	----	---	----	---	7,490	.08
Misc.	1,012	.02	----	---	----	----	----	---	----	---	----	---	1,012	.01
Sub Total	2,049,746	44.6	1,931,250	50.4	282,750	72.3	10,761	19.9	----	---	----	---	4,274,507	47.6
Totals	4,556,376		3,826,741		389,750		53,061		1,250		93,883		8,921,061	

Table A-13

Distribution of Spot in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	35,920	6.5	7,828	79.6	4,000	100	2,838	86.4	----	---	79,000	100	129,586	20.0
Piedmont	11,449	2.0	2,000	20.4	----	---	299	9.0	----	---	----	---	13,748	2.1
Sub Total	47,369	8.5	9,828	100.0	4,000	100	3,137	95.4	----	---	79,000	100	143,334	22.1
Out of State														
Va.	91,855	16.8	----	---	----	---	149	4.3	----	---	----	---	92,004	14.3
Md.	129,743	23.7	----	---	----	---	----	---	----	---	----	---	129,743	20.0
Penn.	1,333	.24	----	---	----	---	----	---	----	---	----	---	1,333	.20
N. Y.	272,692	49.8	----	---	----	---	----	---	----	---	----	---	272,692	42.3
S. C.	4,485	.82	----	---	----	---	----	---	----	---	----	---	4,485	.7
Ga.	-----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. J.	40	.007	----	---	----	---	----	---	----	---	----	---	40	.006
Misc.	149	.027	----	---	----	---	----	---	----	---	----	---	149	.023
Sub Total	500,297	91.4	----	---	----	---	149	4.3	----	---	----	---	500,446	77.7
Totals	547,666		9,828		4,000		3,286		----		79,000		643,780	

Table A-14

Distribution of Spot in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,112,050	63.8	95,150	91.2	3,750	9.0	19,750	61.7	500	10.2	65,100	100	2,296,400	64.5
Piedmont	13,750	.42	3,750	3.6	3,750	9.0	3,750	11.7	----	---	----	---	25,000	.7
Sub Total	2,125,800	64.2	79,000	94.8	7,500	18.0	23,500	73.4	500	10.2	65,100	100	2,321,400	65.2
Out of State														
Va.	179,250	5.4	1,000	.96	----	---	8,500	26.6	----	---	----	---	188,750	5.3
Md.	452,800	13.7	----	---	----	---	----	---	----	---	----	---	452,800	12.7
Penn.	183,900	5.6	----	---	30,000	71.6	----	---	----	---	----	---	213,900	6.0
N. Y.	244,500	7.4	----	---	----	---	----	---	----	---	----	---	244.500	6.9
S. C.	119,625	3.6	625	.6	635	1.5	----	---	625	12.8	----	---	121,500	3.4
Ga.	1,500	.04	1,500	1.44	1,500	3.6	----	---	1,500	30.8	----	---	6,000	.17
Fla.	1,250	.04	1,250	1.2	1,250	3.0	----	---	1,250	25.6	----	---	5,000	.14
Ala.	500	.02	500	.48	500	1.2	----	---	500	10.2	----	---	2,000	.06
La.	500	.02	500	.48	500	1.2	----	---	500	10.2	----	---	2,000	.06
Sub Total	1,183,825	35.8	5,375	5.16	34,375	82.1	8,500	26.6	4,375	89.6	----	---	1,236,450	34.7
Totals	3,309,625		104,375		41,875		32,000		4,875		65,100		3,557,850	

Table A-15

Distribution of Spot in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	21,554	14.0	645,000	37.8	82,773	73.4	----	---	----	---	10,773	38.1	760,090	38.1
Piedmont	68,500	44.5	440,500	25.8	16,000	13.0	----	---	----	---	----	---	525,000	26.3
Sub Total	90,054	58.5	1,085,500	63.6	98,773	86.4	----	---	----	---	10,773	---	1,285,090	64.4
Out of State														
Va.	64,000	41.5	----	---	----	---	----	---	----	---	----	---	64,000	3.2
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
S.C.	----	---	620,000	36.4	24,000	19.5	----	---	----	---	----	---	644,000	32.3
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	64,000	41.5	620,000	36.4	24,000	19.5	----	---	----	---	----	---	708,000	35.5
Totals	154,054		1,705,500		122,773		----		----		10,733		1,993,060	

Table A-16

Distribution of Spot in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	2,169,524	5.3	748,078	41.1	90,523	53.6	22,588	64.0	500	10.2	154,873	100	3,186,086	51.4
Piedmont	93,699	2.3	446,250	24.5	19,750	11.7	4,049	11.4	---	---	----	---	563,748	9.1
Sub Total	2,263,223	7.6	1,194,328	65.6	110,273	65.3	26,637	75.4	500	10.2	154,873	100	3,749,834	60.5
Va.	335,105	8.3	1,000	.05	----	---	8,649	24.5	----	---	----	---	344,754	5.5
Md.	582,543	14.5	----	---	----	---	----	---	----	---	----	---	582,543	9.4
Penn.	185,233	14.5	----	---	30,000	17.7	----	---	----	---	----	---	215,233	3.4
N. Y.	517,192	12.8	----	---	----	---	----	---	----	---	----	---	517,192	8.3
S. C.	124,110	3.0	620,625	34.1	24,625	14.6	----	---	625	12.8	----	---	769,985	12.4
Ga.	1,500	.03	1,500	.08	1,500	.88	----	---	1,500	30.8	----	---	6,000	.09
Fla.	1,250	.03	1,250	.06	1,250	.7	----	---	1,250	25.6	----	---	5,000	.08
Ala.	500	.01	500	.02	500	.2	----	---	500	10.2	----	---	2,000	.03
La.	500	.01	500	.02	500	.2	----	---	500	10.2	----	---	2,000	.03
N. J.	40	.0009	----	---	----	---	----	---	----	---	----	---	40	.0006
Misc.	149	.003	----	---	----	---	----	---	----	---	----	---	149	.002
Sub Total	1,748,122	43.4	625,375	34.3	58,375	34.2	8,649	24.5	4,375	89.6	----	---	2,444,896	32.2
Totals	4,011,345		1,819,703		168,648		35,286		4,875		154,873		6,194,720	

Table A- 17

Distribution of Bluefish in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	65,460	4.7	5,683	88.3	1,500	100	1,642	77.0	----	---	181,500	100	255,785	16.2
Piedmont	4,244	.3	750	11.6	----	---	329	15.4	----	---	----	---	5,323	.3
Sub Total	69,704	5.0	6,433	99.9	1,500	100	1,971	92.4	----	---	181,500	100	261,108	16.5
Out of State														
Va.	135,275	9.7	----	---	----	---	164	7.7	----	---	----	---	135,439	8.6
Md.	306,334	22.0	----	---	----	---	----	---	----	---	----	---	306,334	19.4
Penn.	1,500	.1	----	---	----	---	----	---	----	---	----	---	1,500	.09
N. Y.	853,539	61.4	----	---	----	---	----	---	----	---	----	---	853,539	54.0
S. C.	4,935	.4	----	---	----	---	----	---	----	---	----	---	4,935	.3
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. J.	19,180	1.4	----	---	----	---	----	---	----	---	----	---	19,180	1.2
Misc.	165	.01	----	---	----	---	----	---	----	---	----	---	165	.01
Sub Total	1,320,928	95.0	----	---	----	---	164	7.7	----	---	----	---	1,321,092	83.6
Totals	1,390,632		6,433		1,500		2,135		----		181,500		1,582,200	

Table A-18

Distribution of Bluefish in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	133,775	30.5	1,875	32.2	1,125	31.6	3,375	56.6	750	100	----	---	140,900	31.0
Piedmont	3,375	.77	1,125	19.4	1,125	31.6	1,125	18.9	----	---	----	---	6,750	1.5
Sub Total	137,150	31.3	3,000	51.6	2,250	63.2	4,500	75.5	750	100	----	---	147,650	32.5
Out of State														
Va.	73,200	16.7	1,500	25.8	----	---	150	2.5	----	---	----	---	74,850	16.5
Md.	69,150	15.8	----	---	----	---	----	---	----	---	----	---	69,150	15.2
Penn.	103,850	23.7	----	---	----	---	----	---	----	---	----	---	103,850	22.8
N. Y.	53,000	12.1	----	---	----	---	----	---	----	---	----	---	53,000	11.6
S. C.	1,087	.25	188	3.2	188	5.3	188	2.5	----	---	----	---	1,651	.36
Ga.	450	.10	450	7.7	450	12.6	450	7.5	----	---	----	---	1,800	.4
Fla.	375	.08	375	6.4	.375	10.5	375	6.3	----	---	----	---	1,500	.33
Ala.	150	.03	150	2.6	150	4.2	150	2.5	----	---	----	---	600	13
La.	150	.03	150	2.6	150	4.2	150	2.5	----	---	----	---	600	.13
Sub Total	301,412	68.8	2,813	48.3	1,313	36.8	1,463	23.8	----	---	----	---	307,001	67.4
Totals	438,562		5,813		3,563		5,963		750		----		454,651	

Table A-19

Distribution of Bluefish in 1974:

Southern District

N. C.	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
Coastal	5,386	52.0	6,300	25.7	2,250	64.3	----	---	----	---	----	---	13,936	38.3
Piedmont	975	9.4	14,475	59.0	500	14.3	----	---	----	---	----	---	15,950	43.8
Sub Total	6,361	61.4	20,775	84.7	2,750	78.6	----	---	----	---	----	---	29,886	82.1
Out of State														
Va.	2,000	19.3	----	---	----	---	----	---	----	---	----	---	2,000	5.5
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
S. C.	----	---	3,750	15.3	750	21.4	----	---	----	---	----	---	4,500	12.4
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	2,000	19.3	3,750	15.3	750	21.4	----	---	----	---	----	---	6,500	17.9
Totals	8,361		24,525		3,500		----		----		----		36,386	

Table A- 20

Distribution of Bluefish in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	204,621	11.1	13,858	37.6	4,875	.01	5,017	62.0	750	100	181,500	100	410,621	19.8
Piedmont	8,594	.46	16,350	44.4	1,625	18.9	1,454	.17	----	---	----	---	28,023	1.3
Sub Total	213,215	11.5	30,208	82.0	6,500	18.9	6,471	62.1	750	100	181,500	100	438,644	21.1
Out of State														
Va.	210,475	11.4	1,500	4.0	----	---	314	3.8	----	---	----	---	212,289	10.2
Md.	375,484	20.4	----	---	----	---	----	---	----	---	----	---	375,484	18 1
Penn.	105,350	5.7	----	---	----	---	----	---	----	---	----	---	105,350	5.0
N. Y.	906,539	49.3	----	---	----	---	----	---	----	---	----	---	906,539	43.7
S. C.	6,022	.32	3,938	10.7	938	10.9	188	2.3	----	---	----	---	11,086	.5
Ga.	450	.02	450	1.2	450	5.2	450	5.5	----	---	----	---	1,800	.08
Fla.	375	.02	375	1.0	375	4.3	375	4.6	----	---	----	---	1,500	.07
Ala.	150	.008	150	.40	150	1.7	150	1.8	----	---	----	---	600	.02
La.	150	.008	150	.40	150	1.7	150	1.8	----	---	----	---	600	.02
N. J.	19,180	1.0	----	---	----	---	----	---	----	---	----	---	19,180	.9
Misc.	165	.008	----	---	----	---	----	---	----	---	----	---	165	.007
Sub Total	1,624,340	88.2	6,563	17.7	2,063	23.8	1,627	19.8	----	---	----	---	1,634,593	78.6
Totals	1,837,555		36,771		8,563		8,098		750		181,500		2,073,237	

Table A-21

Distribution of Mullet in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	27,105	6.0	2,540	100	----	---	560	65.3	----	---	75,000	100	105,205	19.6
Piedmont	297	.06	----	---	----	---	198	23.0	----	---	----	---	495	.09
Sub Total	27,402	6.06	2,540	100	----	---	758	88.3	----	---	75,000	100	105,700	19.7
Out of State														
Va.	36,060	7.9	----	---	----	---	99	11.6	----	---	----	---	36,159	6.7
Md.	130,098	28.4	----	---	----	---	----	---	----	---	----	---	130,098	6.7
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	259,649	56.6	----	---	----	---	----	---	----	---	----	---	259,649	48.4
S. C.	2,970	.6	----	---	----	---	----	---	----	---	----	---	2,970	.5
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. J.	2,100	.4	----	---	----	---	----	---	----	---	----	---	2,100	.4
Misc.	99	.02	----	---	----	---	----	---	----	---	----	---	99	.02
Sub Total	430,976	93.9	----	---	----	---	99	11.6	----	---	----	---	431,075	80.2
Total	458,378		2,540		----		857		----		75,000		536,775	

Table A- 22

Distribution of Mullet in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	265,528	76.5	4,150	63.6	750	28.6	3,900	66.4	----	---	----	---	274,328	75.8
Piedmont	1,250	.36	750	11.5	750	28.6	750	12.8	----	---	----	---	3,500	.97
Sub Total	266,778	76.86	4,900	75.1	1500	57.2	4,650	79.2	----	---	----	---	277,828	76.77
Out of State														
Va.	24,250	7.0	500	7.7	----	---	100	1.7	----	---	----	---	24,850	6.9
Md.	7,450	2.1	----	---	----	---	----	---	----	---	----	---	7,450	2.06
Penn.	22,550	6.5	----	---	----	---	----	---	----	---	----	---	22,550	6.2
S. C.	24,925	7.2	125	1.9	125	4.8	125	2.1	----	---	----	---	25,300	7.0
Ga.	300	.09	300	4.6	300	11.4	300	5.1	----	---	----	---	1,200	.33
Fla.	500	.14	500	7.7	500	19.0	500	8.5	----	---	----	---	2,000	.55
Ala.	100	.03	100	1.5	100	3.8	100	1.7	----	---	----	---	400	.11
La.	100	.03	100	1.5	100	3.8	100	1.7	----	---	----	---	400	.11
Sub Total	80,175	23.19	1,625	24.9	1125	42.8	1,225	20.8	----	---	----	---	84,150	23.26
Totals	346,953		6,525		2625		5,875		----		----		361,978	

Table A-23

Distribution of Mullet in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	32,317	39.2	142,500	18.6	38,659	75.6	----	---	----	---	16,159	100	229,635	25.1
Piedmont	30,000	36.4	415,000	54.2	5,000	9.8	----	---	----	---	----	---	450,000	49.2
Sub Total	62,317	75.6	557,500	72.8	43,659	85.4	----	---	----	---	16,159	100	679,635	74.3
Out of State														
Va.	20,000	24.3	----	---	----	---	----	---	----	---	----	---	20,000	2.2
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
S. C.	----	---	207,500	27.1	7,500	14.7	----	---	----	---	----	---	215,000	23.5
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	20,000	24.3	207,500	27.1	7,500	14.7	----	---	----	---	----	---	235,000	25.7
Totals	82,317		765,000		51,159		----		----		16,159		914,635	

Table A- 24

Distribution of Mullet in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	324,950	36.6	149,190	19.2	39,409	73.2	4,460	66.2	----	---	91,159	100	609,168	33.6
Piedmont	31,547	3.5	415,750	53.7	5,750	10.6	948	14.0	----	---	----	---	453,995	25.0
Sub Total	356,497	40.1	564,940	72.9	45,159	83.8	5,408	80.2	----	---	91,159	100	1,063,163	
Out of State														
Va.	80,310	9.0	500	.06	----	---	199	2.9	----	---	----	---	81,009	4.5
Md.	137,548	15.4	----	---	----	---	----	---	----	---	----	---	137,548	7.6
Penn.	22,550	2.5	----	---	----	---	----	---	----	---	----	---	22,550	1.2
N. Y.	259,649	29.2	----	---	----	---	----	---	----	---	----	---	259,649	14.3
S. C.	27,895	3.1	207,625	26.8	7,625	14.1	125	1.8	----	---	----	---	243,270	13.4
Ga.	300	.03	300	.03	300	.55	300	4.4	----	---	----	---	1,200	.06
Fla.	500	.05	500	.06	500	.9	500	1.4	----	---	----	---	2,000	.1
Ala.	100	.01	100	.01	100	.1	100	1.4	----	---	----	---	400	.02
La.	100	.01	100	.01	100	.1	100	1.4	----	---	----	---	400	.02
N. J.	2,100	.2	----	---	----	---	----	---	----	---	----	---	2,100	.1
Misc.	99	.01	----	---	----	---	----	---	----	---	----	---	99	.005
Sub Total	531,151	59.51	209,125	26.97	8,625	15.75	1,324	13.3	----	---	----	---	750,225	41.3
Totals	887,648		774,065		53,784		6,732		----	---	91,159		1,813,388	

Table A-25

Distribution of Shrimp in 1974:

Northern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	20,200	23.0	4,000	100	2,080	100	1,040	50.0	----	---	52,660	100	79,980	28.2
Piedmont	5,200	5.6	----	---	----	---	1,040	50.0	----	---	----	---	6,240	2.2
Sub Total	25,400	28.6	4,000	100	2,080	100	2,080	100	----	---	52,660	100	86,220	30.4
Out of State														
Va.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Md.	693	.8	----	---	----	---	----	---	----	---	----	---	693	.2
Penn.	693	.8	----	---	----	---	----	---	----	---	----	---	693	.2
N. Y.	60,694	69.4	----	---	----	---	----	---	----	---	----	---	60,694	21.4
S. C.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	135,000	100	----	---	135,000	47.6
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	62,773	71.0	----	---	----	---	----	---	135,000	100	----	---	197,080	69.4
Total	87,480		4,000		2,080		2,080		135,000		52,660		283,300	

Table A- 26

Distribution of Shrimp in 1974:

Central District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	281,843	29.6	107,341	53.4	----	---	849,968	76.5	----	---	155,244	100	1,394,396	40.0
Piedmont	132,682	14.0	93,750	46.6	103,750	64.3	103,750	9.3	----	---	----	---	433,932	12.4
Sub Total	414,525	43.6	201,091	100	103,750	64.3	953,718	85.8	----	---	155,244	100	1,828,328	52.4
Out of State														
Va.	225,774	24.0	----	---	20,000	12.4	57,000	5.1	26,304	2.9	----	---	329,078	9.4
Md.	37,500	4.0	----	---	37,500	23.2	10,000	.9	----	---	----	---	85,000	2.4
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	113,304	11.9	----	---	----	---	----	---	----	---	----	---	113,304	3.2
S. C.	14,500	1.5	----	---	----	---	30,000	2.7	37,900	4.2	----	---	82,400	2.4
Ga.	62,500	6.6	----	---	----	---	60,000	5.4	105,360	11.6	----	---	227,860	6.5
Fla.	----	---	----	---	----	---	----	---	736,911	81.3	----	---	736,911	21.1
Ala.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. J.	60,000	6.3	----	---	----	---	----	---	----	---	----	---	60,000	1.7
Wash., D. C.	24,120	2.5	----	---	----	---	----	---	----	---	----	---	24,120	.7
Sub Total	537,698	56.8	----	---	57,500	35.6	157,000	14.1	906,475	100	----	---	1,658,673	47.4
Total	952,223		201,091		161,250		1,110,718		906,475		155,244		3,487,001	

Table A- 27

Distribution of Shrimp in 1974:

Southern District

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	----	---	90,348	41.6	----	---	60,623	96.4	----	---	52,623	100	203,594	37.4
Piedmont	144,500	86.8	126,750	58.4	4,500	40.0	2,250	3.6	----	---	----	---	278,000	51.0
Sub Total	144,500	86.8	217,098	100	4,500	40.0	62,873	100	----	---	52,623	100	481,594	125.8
Out of State														
Va.	18,000	10.8	----	---	----	---	----	---	----	---	----	---	18,000	3.3
Md.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Penn.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
N. Y.	----	---	----	---	----	---	----	----	----	---	----	---	----	---
S. C.	4,000	2.4	33,750	15.5	6,750	60.0	----	---	----	---	----	---	44,500	8.2
Ga.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Fla.	----	---	----	---	----	---	----	---	----	---	----	---	----	---
Ala.	-----	---	----	---	----	---	----	---	----	---	----	---	----	---
La.	------	---	----	---	----	---	----	---	----	---	----	---	----	---
Sub Total	22,000	13.2	33,750	15.5	6,750	60.0	----	---	----	---	----	---	62,500	11.5
Total	166,500		217,098		11,250		62,873		----		52,623		544,094	

Table A- 28

Distribution of Shrimp in 1974:

State Totals

	Whole & Dist.	%	Retail Fish Mkts.	%	Super Mkts.	%	Rest.	%	Seafood Process	%	Retail Sales	%	Total	%
N. C.														
Coastal	302,043	25.0	201,689	44.2	2080	1.1	911,631	77.5	----	---	260,527	100	1,677,970	38.9
Piedmont	282,382	23.4	220,500	48.3	108,250	62.0	107,040	9.1	----	---	----	---	718,172	16.6
Sub Total	584,425	48.4	422,189	92.5	110,330	63.1	1018,671	86.6	----	---	260,527	100	2,396,142	55.5
Out of State														
Va.	243,774	20.2	----	---	20,000	11.4	57,000	4.8	26,304	2.5	----	---	347,078	8.1
Md.	38,193	3.1	----	---	37,500	21.4	10,000	.8	----	---	----	---	85,693	2.0
Penn.	693	.05	----	---	----	---	----	---	----	---	----	---	693	.016
N.Y.	173,998	14.4	----	---	----	---	----	---	----	---	----	---	173,998	4.1
S.C.	18,500	1.5	33,750	7.4	6750	3.8	30,000	2.5	37,900	3.6	----	---	125,900	2.9
Ga.	62,500	.005	----	---	----	---	60,000	5.1	105,360	10.1	----	---	227,860	5.3
Fla.	----	---	----	---	----	---	----	---	871,911	83.7	----	---	871,911	20.2
N.J.	60,000	4.9	----	---	----	---	----	---	----	---	----	---	60,000	1.4
Wash., D.C.	24,120	1.9	----	---	----	---	----	---	----	---	----	---	24,120	0.6
Sub Total	621,778	46055	33,750	7.4	64,250	36.6	157,000	13.2	1041,475	99.9	----	---	1,917,253	44616
Totals	1,206,203		455,939		174,580		1,175,671		1041,475		260,527		4,313,395	