Coastal Access and Working Waterfronts, in ME and Hancock County

HCPC workshop, June 2013

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Sea Grant Maine

Outline

- Economic value of marine sector
- Access challenges
- Access status
- Tools
- The Future

Economic value of marine sector

- 6 sectors: marine construction, marine living resources, offshore minerals, ship/boat building/repair, coastal tourism/rec, marine transportation.
- 11 U.S. coastal rgns, 30 states, 444 counties
  - 130,000 ocean-related business establishments
  - $84.25 billion in wages and benefits
  - $217.87 billion in GDP
  - 3.41% of total GDP
  - 4.85% total employment

Share of ocean economy employment, wages and Gross Domestic Product in 2009 by U.S. coastal region.

U.S. Coastal Region	U.S. Ocean Economy		
	Employment	Wages	Gross Domestic Product
Atlantic - North	18.3%	15.3%	12.1%
Atlantic - Middle	13.5%	11.9%	7.8%
Atlantic - South	10.8%	7.3%	6.6%
Gulf of Mexico - East	8.4%	5.6%	5.0%
Gulf of Mexico - West	9.9%	23.7%	38.3%
Pacific - Hawaii	3.9%	3.4%	2.4%
Pacific - California	17.8%	18.3%	14.1%
Pacific - Northwest	5.0%	5.6%	4.5%
Pacific - Alaska	1.6%	2.3%	4.0%
Great Lakes - East	3.8%	2.1%	1.6%
Great Lakes - West	7.0%	4.4%	3.6%
All Regions	**100%**	**100%**	**100%**

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Total Share of Gross Domestic Product contribution by ocean-related sectors in U.S. coastal regions in 2009

U.S. Coastal Regions	U.S. Ocean Economy Sectors						All Sectors
	Marine Construction	Living Resources	Offshore Minerals	Ship & Boat Building	Tourism & Recreation	Marine Transportation	
Atlantic Middle	0.4%	0.2%	0.0%	1.6%	4.7%	3.3%	10.2%
Atlantic North	0.3%	0.5%	0.0%	0.4%	10.3%	1.9%	13.4%
Atlantic South	0.4%	0.1%	0.0%	0.4%	4.4%	2.7%	8.1%
GOM East	0.3%	0.1%	0.0%	0.5%	3.5%	0.8%	5.1%
GOM West	0.5%	0.1%	26.1%	0.3%	0.9%	1.7%	29.6%
Great Lakes East	0.0%	0.0%	0.0%	0.0%	1.2%	0.5%	1.8%
Great Lakes West	0.1%	0.0%	0.1%	0.0%	2.9%	0.8%	4.0%
Pacific-Alaska	0.1%	0.3%	2.6%	0.0%	0.3%	0.0%	3.3%
Pacific-California	0.6%	0.1%	0.0%	0.8%	8.2%	8.1%	17.9%
Pacific-Hawaii	0.0%	0.0%	0.0%	0.0%	1.5%	0.1%	1.7%
Pacific-Northwest	0.2%	0.3%	0.0%	2.1%	1.3%	1.0%	4.9%
All Regions	2.9%	1.7%	28.9%	6.1%	39.4%	20.9%	100%

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Appendix 1: Ocean-related economic activity for U.S. coastal regions, states and counties in 2009.
(Data Source: National Ocean Economics Program.)

Region-State-County	Number of Business Establishments	Employment (Jobs)	Wages (Million $)	GDP (Million $)
Atlantic - North	**30,955**	**439,633**	**12,920**	**26,452**
Connecticut	**2,548**	**30,983**	**796**	**1,569**
Fairfield	1,092	12,466	366	752
Middlesex	210	2,920	87	162
New Haven	752	9,145	207	380
New London	494	6,451	136	275
Maine	**2,594**	**34,915**	**1,068**	**1,772**
Cumberland	809	13,144	278	532
Hancock	403	3,397	83	170
Kennebec	15	175	8	12
Knox	294	2,152	51	95
Lincoln	279	2,331	95	147
Penobscot	14	289	15	21
Sagadahoc	13	185	12	18
Waldo	88	929	26	48
Washington	111	898	28	44
York	568	11,414	472	686
Massachusetts	**5,079**	**77,043**	**2,527**	**4,577**
Barnstable	1,287	14,336	333	655

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Appendix 2. Gross Domestic Product for major ocean sectors in U.S. coastal regions, states and counties in 2009.
(Data Source: National Ocean Economics Program.)

Region-State-County	Sum of Gross Domestic Product (Million Dollars)						
	Marine Construction	Living Resources	Offshore Minerals	Ship & Boat Building	Tourism & Recreation	Marine Transportation	All Six Sectors
Atlantic - North	**676.4**	**737.9**	**59.3**	**967.9**	**20,772.8**	**3,237.6**	**26,452.0**
Connecticut	**19.5**	**13.5**	**5.4**	**63.9**	**1,151.9**	**315.2**	**1,569.3**
Fairfield	2.5	8.9	2.2	13.8	544.5	180.3	752.1
Middlesex	11.5	1.5	0.0	0.0	110.5	38.4	162.0
New Haven	2.9	1.3	1.2	13.8	265.0	95.8	380.1
New London	2.6	1.8	2.0	36.2	231.8	0.7	275.1
Maine	**20.6**	**59.9**	**4.9**	**564.8**	**886.7**	**235.4**	**1,772.3**
Cumberland	9.5	8.3	0.7	5.5	370.2	138.0	532.3
Hancock	0.6	33.0	0.2	19.4	114.2	2.1	169.6
Kennebec	0.7	2.6	0.2	4.6	0.0	3.6	11.8
Knox	0.7	1.2	0.2	11.0	67.0	15.3	95.4
Lincoln	3.7	3.1	0.2	69.1	51.2	19.2	146.6
Penobscot	0.0	0.5	1.0	13.8	0.0	5.2	20.5
Sagadahoc	0.7	4.1	0.2	9.2	0.0	3.8	18.2
Waldo	0.7	2.6	0.2	0.8	24.3	19.2	47.8
Washington	0.0	2.8	0.5	18.4	14.4	7.7	43.7
York	3.7	1.8	1.2	413.0	245.4	21.2	686.4
Massachusetts	**87.9**	**437.5**	**13.5**	**89.1**	**2,523.9**	**1,425.1**	**4,577.0**
Barnstable	8.2	10.5	1.5	0.8	612.1	22.3	655.5

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Table 5. Summary of GDP and share of ocean-related employment, wages, and GDP in 2009 for the top 50 U.S. coastal counties

Rank	Region	State	County	GDP (Million $)	Share Employment	Share Wages	Share GDP
1	Gulf of Mexico – West	Louisiana	Vermilion	1,629	13.7%	17.8%	58.8%
2	Gulf of Mexico – West	Louisiana	Plaquemines	2,574	19.2%	20.8%	43.2%
3	Great Lakes – West	Michigan	Keweenaw	14	60.2%	50.7%	42.3%
4	Pacific – Alaska	Alaska	Bristol Bay	163	70.0%	61.7%	34.3%
5	Gulf of Mexico – West	Texas	Refugio	186	23.2%	27.0%	31.7%
6	Gulf of Mexico – West	Louisiana	Lafourche	4,585	13.2%	22.1%	29.3%
7	Gulf of Mexico – West	Louisiana	Orleans	22,955	12.8%	11.7%	28.5%
8	Pacific – Alaska	Alaska	Aleutians West	521	62.9%	52.3%	27.4%
9	Gulf of Mexico – West	Louisiana	Cameron	396	3.0%	5.4%	26.4%
10	Pacific – Alaska	Alaska	Kenai Peninsula	2,315	14.2%	11.4%	25.6%
11	Great Lakes – West	Michigan	Mackinac	271	29.0%	23.7%	23.6%
12	Pacific – Alaska	Alaska	Anchorage	22,031	11.4%	11.7%	23.6%
13	Gulf of Mexico – West	Texas	Harris	291,828	5.4%	12.0%	20.9%
14	Atlantic – Middle	Maryland	Worcester	1,501	29.4%	19.9%	20.1%
15	Pacific – Hawaii	Hawaii	Kauai	2,059	42.6%	29.6%	18.9%
16	Gulf of Mexico – East	Florida	Monroe	3,245	29.9%	21.1%	18.5%
17	Pacific – Hawaii	Hawaii	Maui	6,332	26.1%	21.9%	18.5%
18	Pacific – Northwest	Washington	Kitsap	8,477	12.5%	22.2%	18.4%
19	Atlantic – Middle	Virginia	Westmoreland	248	14.3%	9.3%	17.9%
20	Gulf of Mexico – West	Louisiana	Iberia	4,571	17.0%	20.2%	15.7%
21	Great Lakes – West	Minnesota	Cook	172	28.2%	16.9%	15.0%
22	Atlantic – Middle	Virginia	Portsmouth City	4,630	20.5%	30.8%	14.9%
23	Gulf of Mexico – West	Texas	Aransas	395	20.5%	17.4%	14.8%
24	Atlantic – South	Georgia	McIntosh	82	18.9%	11.4%	14.7%
25	Gulf of Mexico – West	Louisiana	Terrebonne	7,961	19.1%	21.9%	14.7%
26	Pacific – Alaska	Alaska	North Slope	6,606	43.3%	48.9%	14.5%
27	Atlantic – North	Massachusetts	Nantucket	429	24.5%	16.2%	14.2%
28	Pacific – Alaska	Alaska	Yakutat	16	27.6%	23.1%	14.2%
29	Atlantic – North	Maine	York	5,057	17.4%	19.9%	13.5%
30	Gulf of Mexico – East	Florida	Walton	1,427	19.4%	15.2%	12.9%
31	Atlantic – North	Massachusetts	Dukes	636	18.9%	13.0%	12.7%
32	Atlantic – South	South Carolina	Horry	7,234	21.2%	13.8%	12.3%
33	Atlantic – Middle	New Jersey	Cape May	2,944	22.0%	13.6%	12.1%
34	Pacific – Northwest	Washington	San Juan	392	16.5%	10.7%	11.2%
35	Atlantic – Middle	Maryland	Queen Anne's	842	18.1%	10.9%	11.1%
36	Atlantic – South	North Carolina	Hyde	180	17.6%	11.1%	10.9%
37	Atlantic – South	Florida	Nassau	1,442	20.2%	12.3%	10.9%
38	Pacific – Hawaii	Hawaii	Hawaii	5,931	17.6%	13.2%	10.6%
39	Pacific – Northwest	Washington	Pacific	441	15.2%	9.9%	9.9%
40	Atlantic – Middle	Virginia	Lancaster	306	13.8%	7.9%	9.8%
41	Atlantic – South	North Carolina	Dare	1,725	21.5%	15.8%	9.5%
42	Atlantic – North	Massachusetts	Barnstable	6,860	16.1%	9.5%	9.4%
43	Pacific – Northwest	Oregon	Lincoln	1,199	21.6%	12.7%	9.4%
44	Pacific – Alaska	Alaska	Valdez-Cordova	617	21.5%	12.9%	9.1%
45	Atlantic – North	Maine	Hancock	1,503	14.5%	9.9%	9.1%
46	Great Lakes – West	Wisconsin	Door	814	17.5%	9.8%	8.9%
47	Gulf of Mexico – East	Florida	Franklin	268	22.5%	13.9%	8.9%
48	Atlantic – South	Georgia	Glynn	3,025	17.6%	9.7%	8.5%
49	Gulf of Mexico – West	Texas	Nueces	13,266	9.0%	6.7%	8.3%
50	Gulf of Mexico – East	Alabama	Mobile	14,998	6.7%	6.0%	8.2%

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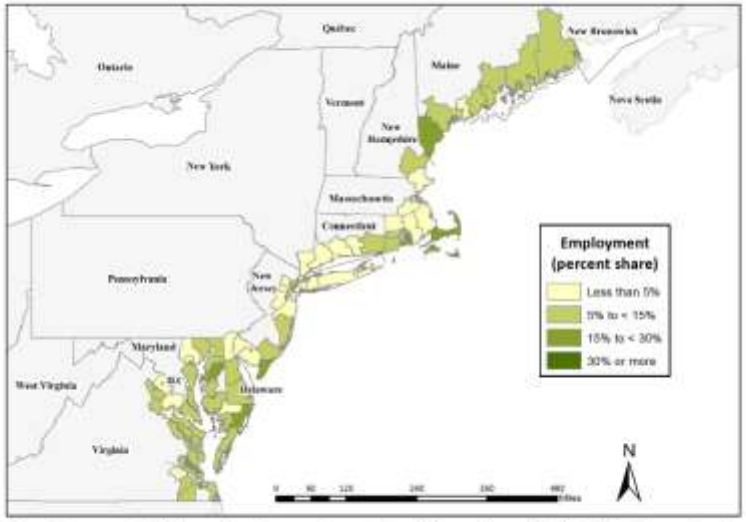

Figure 23. Map of ocean-related share of employment in counties of the north- and middle- Atlantic coast regions in 200

(Data Source: National Ocean Economics Program.)

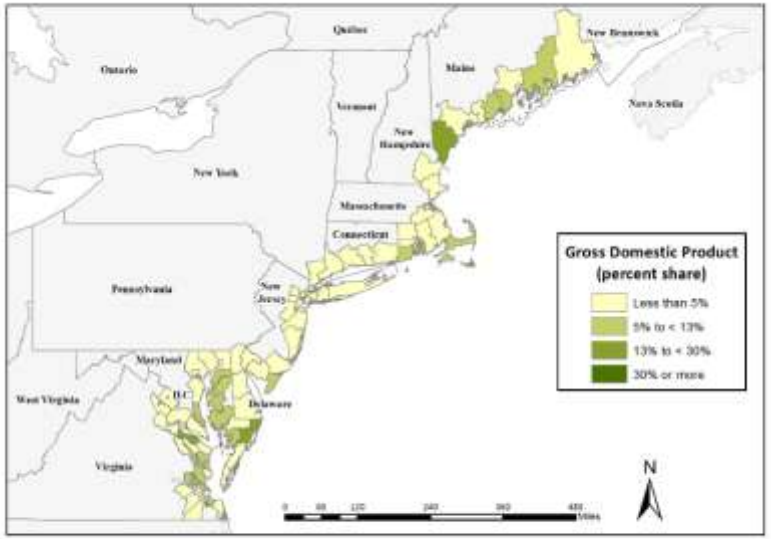

Figure 22. Map of ocean-related share of GDP in counties of the North- and Middle-Atlantic coastal regions in 2009.

(Data Source: National Ocean Economics Program.)

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Fishing-specific data

- 10,300 harvesters
- 3,000 boatyard/marina employees
- 26,000 fishing related jobs
- $740 million income

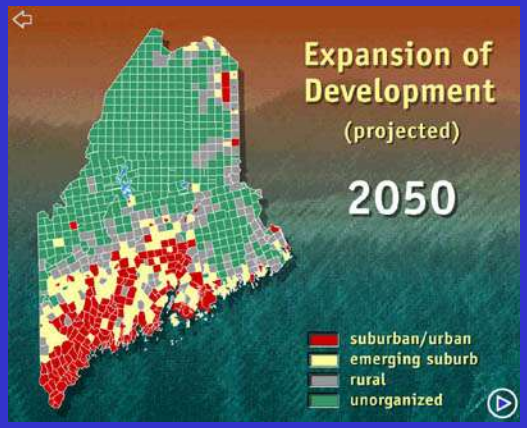
Maine Working Waterfront Coalition

Without access, that economic activity STOPS!

- WWF and coastal access defines the soul and character of Maine…

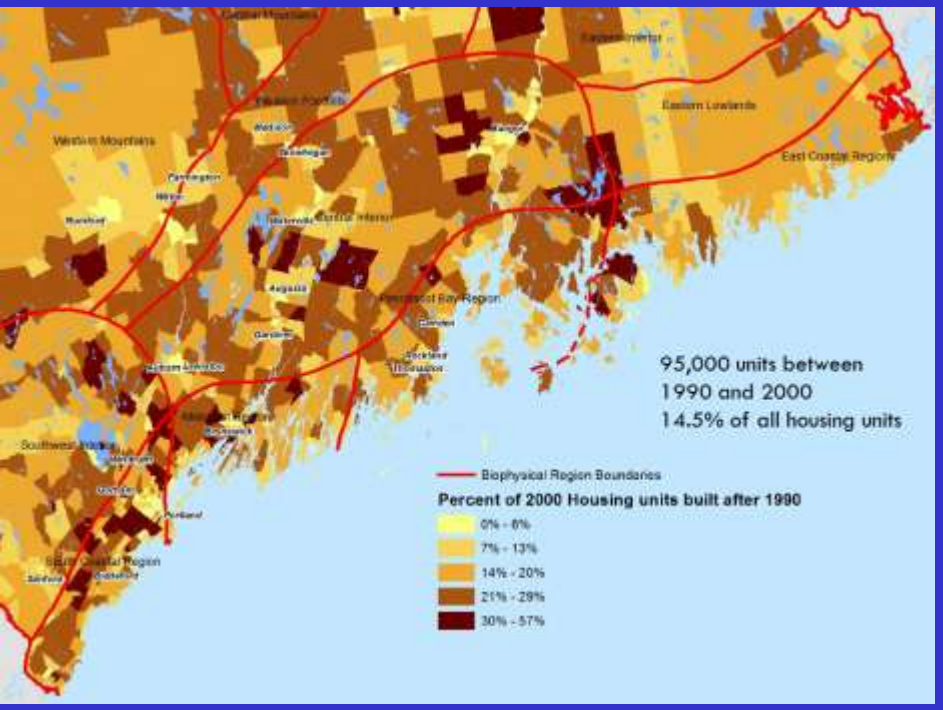
Projections from ME State Planning Office

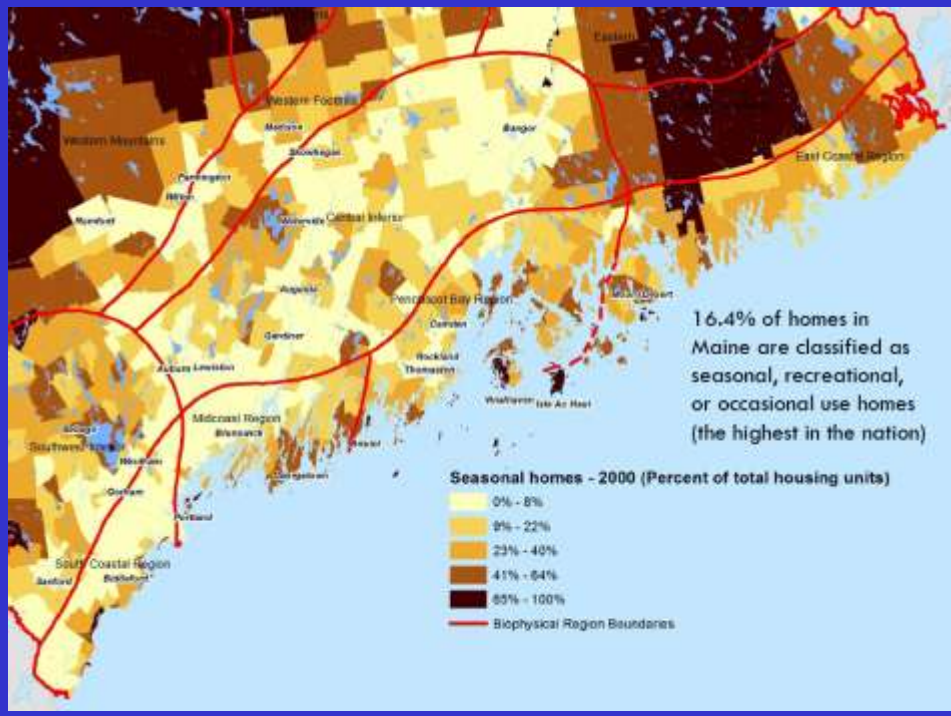
Maine's coast is in transition…



…By 2050, the majority of Maine's coast will be classifiable as suburban/urban

Modern homes, second homes…





Maps Developed by Maine Coast Heritage Trust as part of their 2012/3 Strategic Planning effort

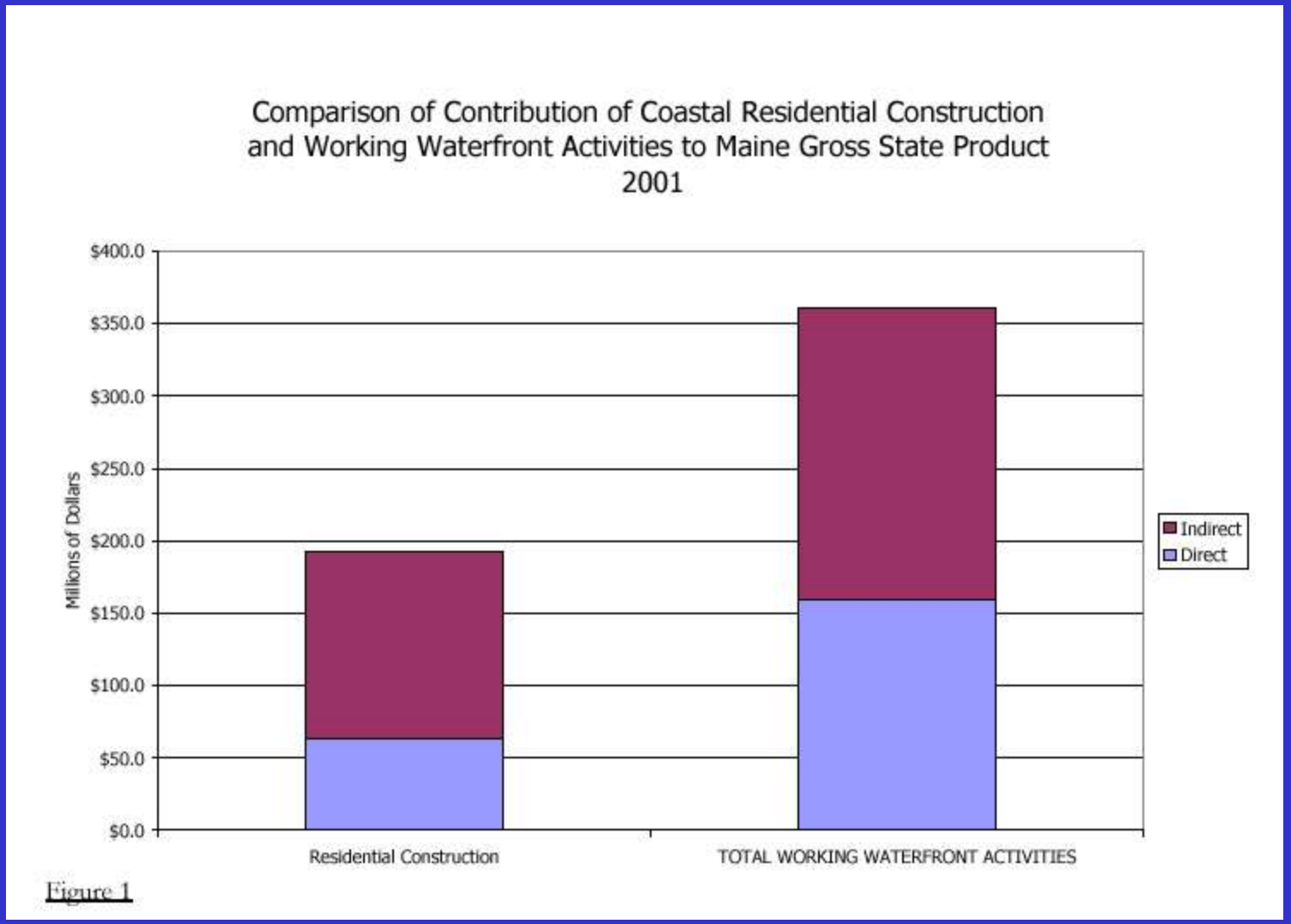


Figure 1

Construction: 500 homes valued at $650,000

WW: Seafood processing, marinas, lobster landed value, and boat building

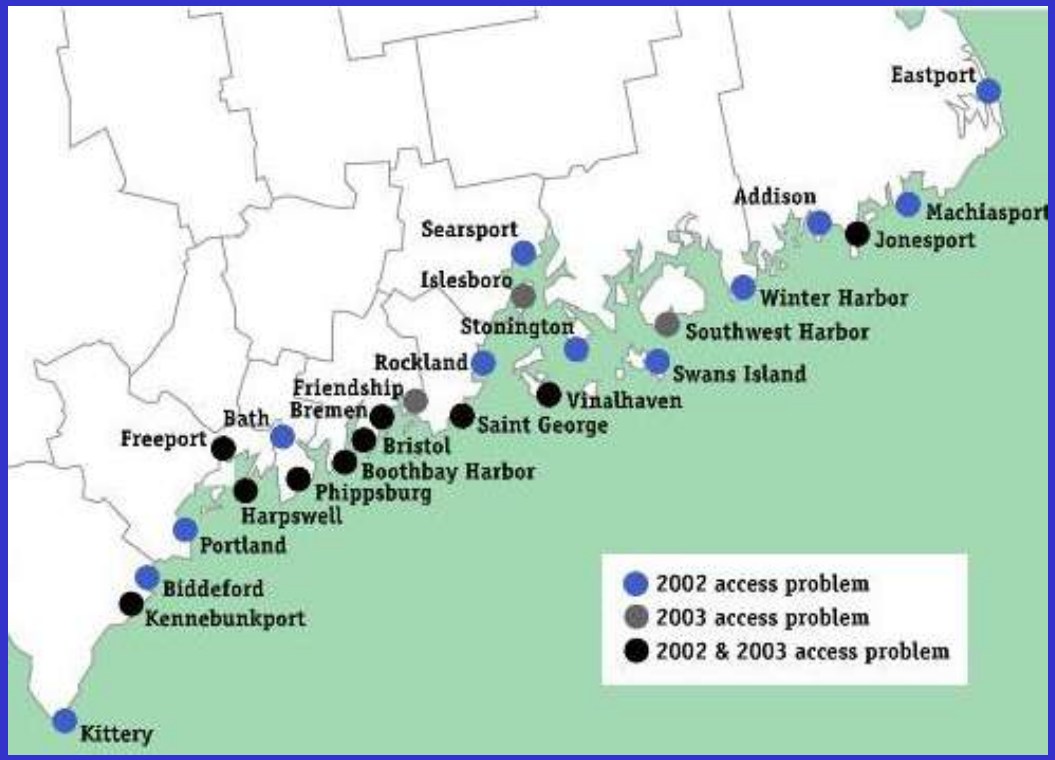
(From Colgan, *Contribution of WW to Maine Economy)*

• Escalating real estate values – 58% land values have increased, some as high as 103% (Harpswell)

•The gap between market value and affordability continues to grow for waterfront businesses and municipalities

•Conversion and competition lead to closed off access points – 52% of communities

•Water quality impacts



Data from CEI and SPO: *Tracking Commercial Fishing Access* – A survey of Harbormasters, twenty five Maine coastal communities 2004

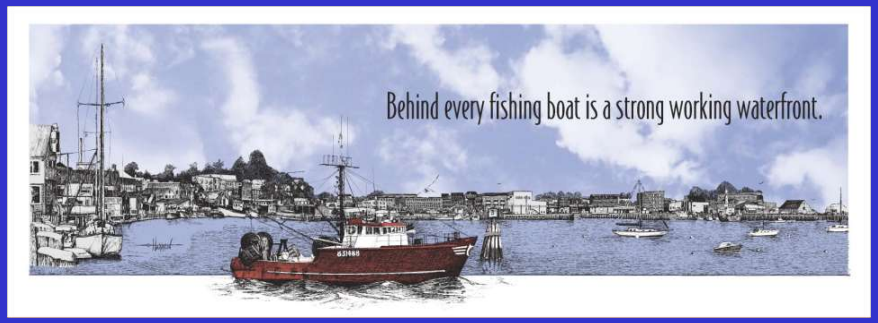
Current Access Challenges

Expressed Needs

General needs of municipalities:

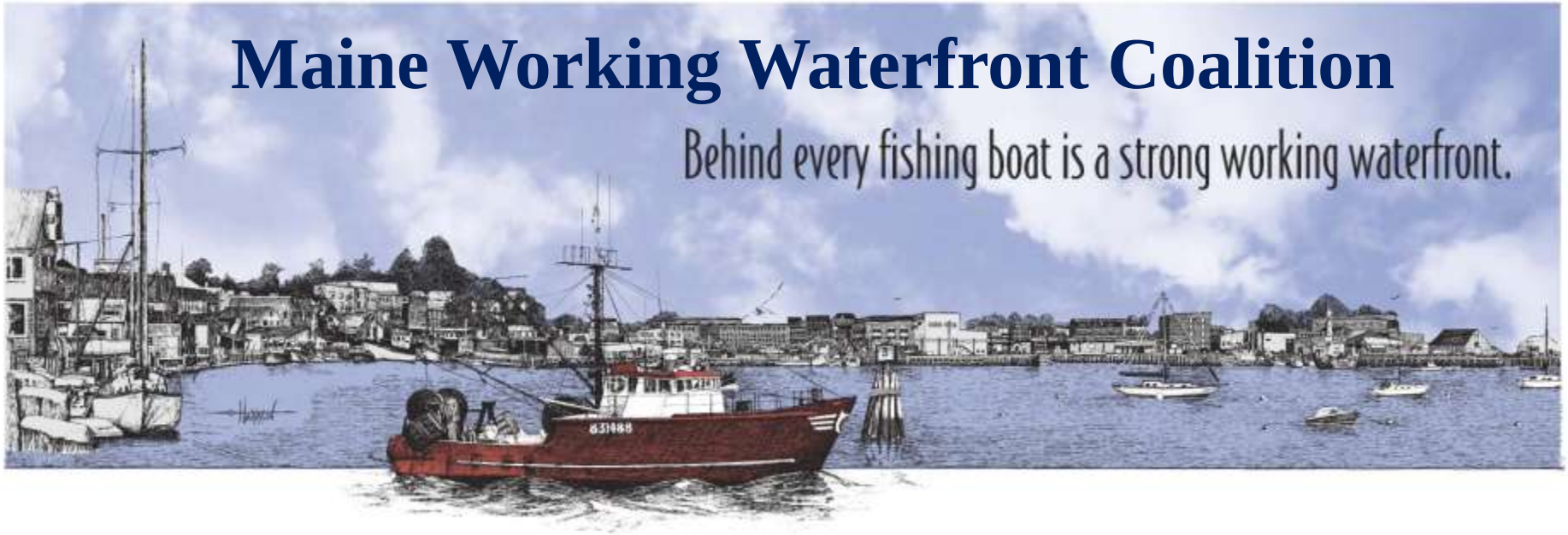
- 84% tax relief
- 76% waterfront planning assistance
- 72% assistance purchasing access rights

Data from CEI and SPO: *Tracking Commercial Fishing Access* – A survey of Harbormasters, twenty five Maine coastal communities 2oo4



Reprinted courtesy of Foster's Daily Democrat, Dover, NH. Photo by Steve Drozell.

Maine Working Waterfront Coalition



A statewide group of over 100 industry associations, nonprofits, state agencies and individuals dedicated to supporting and enhancing Maine's working waterfront through policy, planning, research, investment and education.

Sea Grant Maine

CEI COASTAL ENTERPRISES INC.

40 YEARS Maine Coast Heritage Trust

Land for Maine's Future LMF

Sea Grant Law Center

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DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES Maine Revenue Services STATE OF MAINE

Maine Coastal Program

MAINE MARINE RESOURCES

Mapping Maine's Working Waterfront,
A Statewide Inventory by the Island Institute

Figure 3: shows the breakdown in ownership of the 1,555 access points identified.

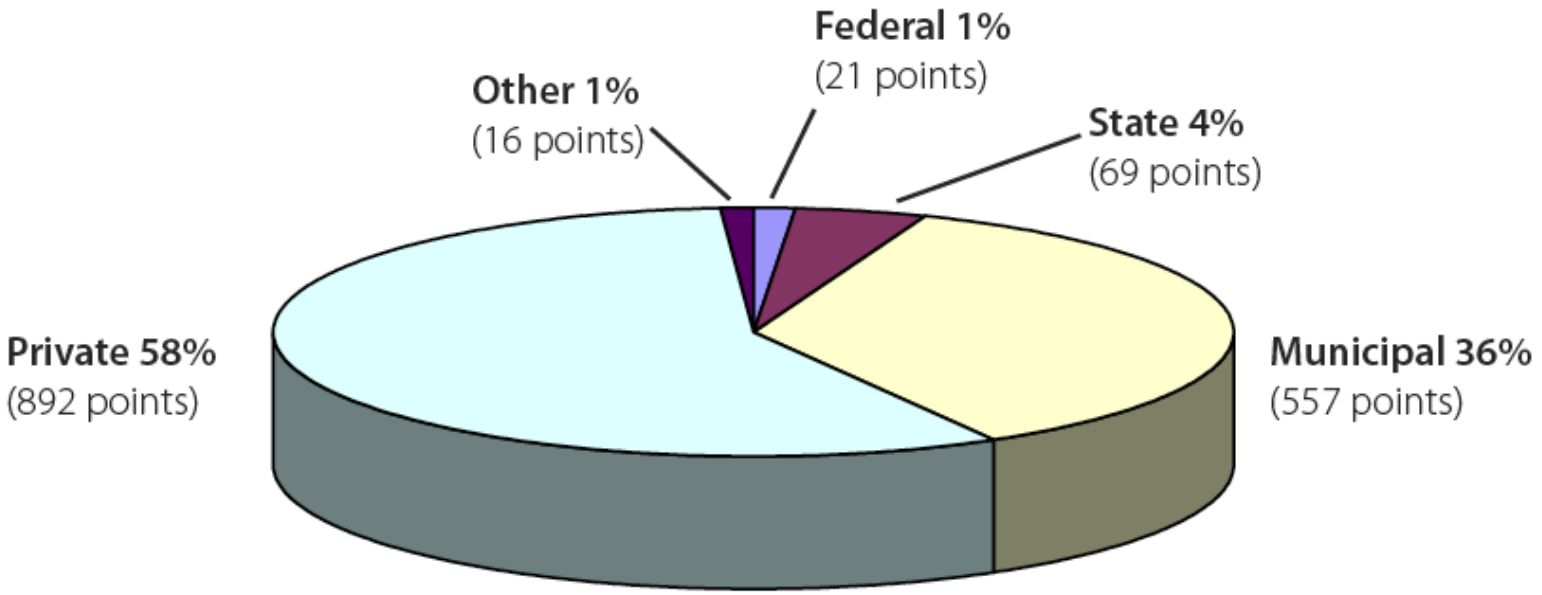
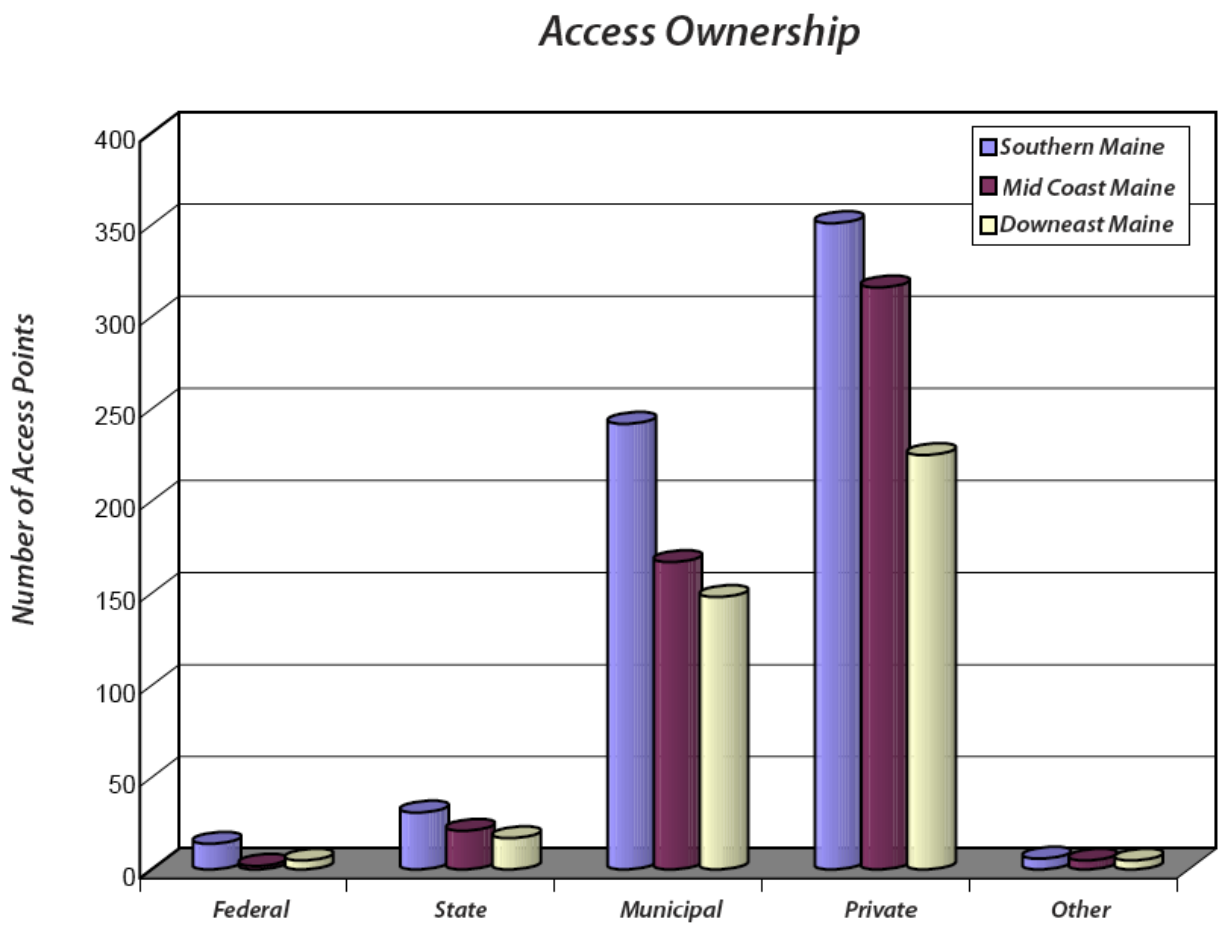


Figure 4: Access ownership in Southern, Midcoast and Downeast Maine



Mapping Maine's Working Waterfront, A Statewide Inventory by the Island Institute.

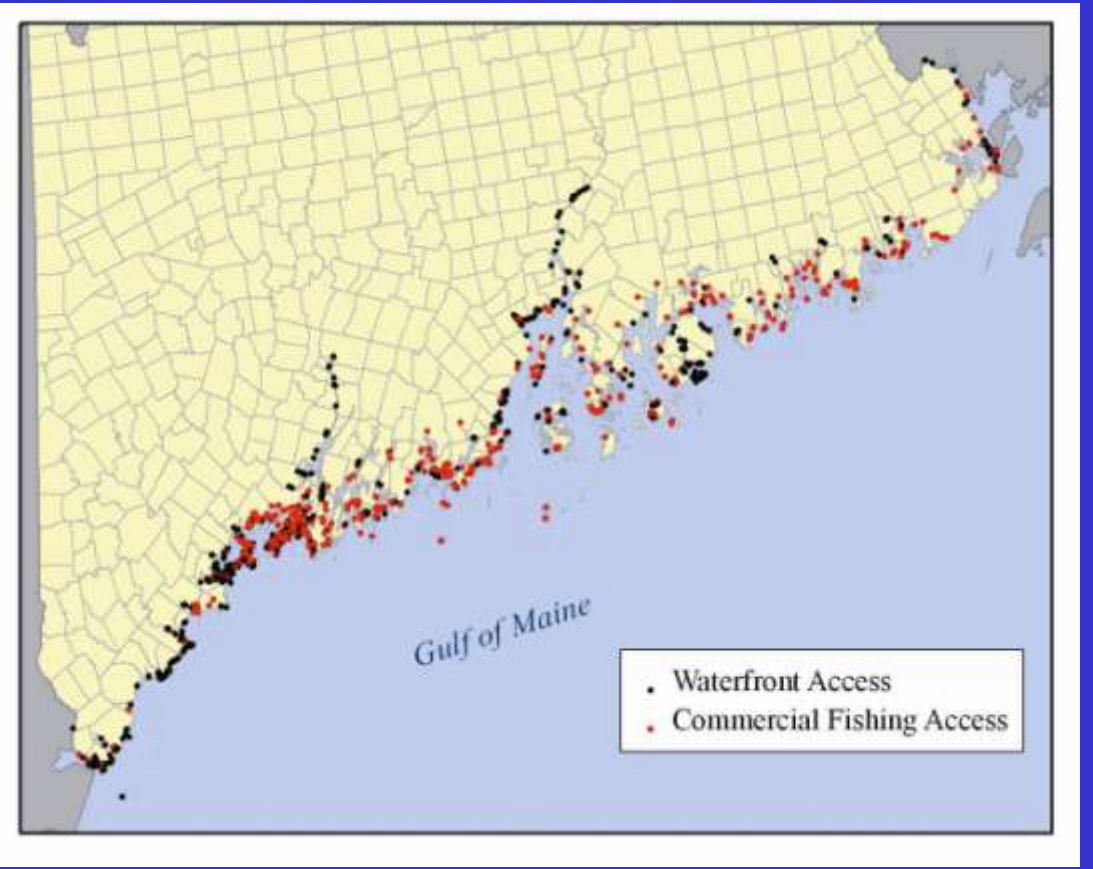
Results: Declining Working Waterfront Access

- Only about half of the 1,555 saltwater access points support commercial fishing activities/marine trades, with limitations.

- Of those, 66% are privately owned and are vulnerable to conversion.

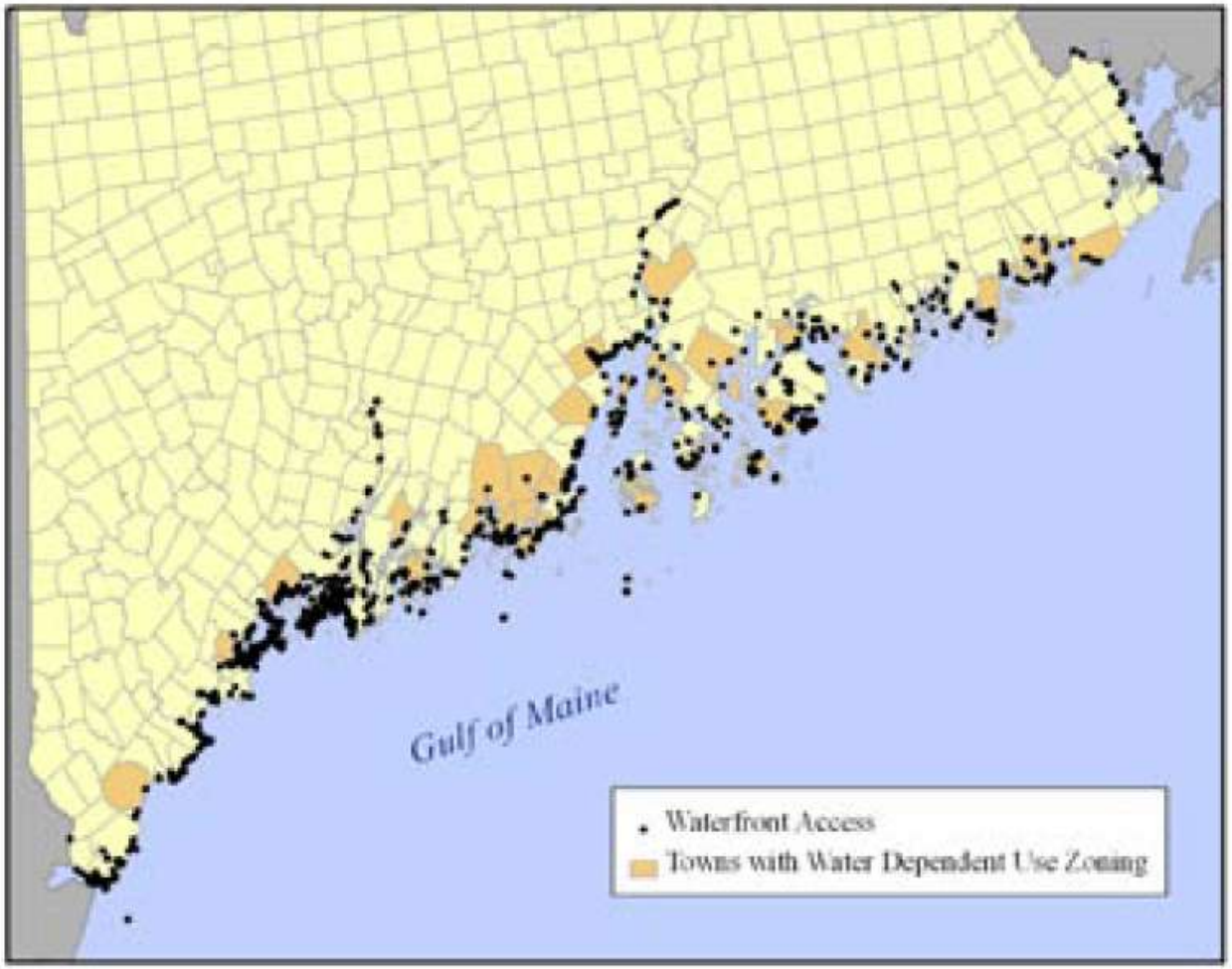
- Of Maine's 5,300 mile coast, only 20 miles support WW.

- Only 81 access points are prime working waterfront (parking, all-tide, fuel)



Mapping Maine's Working Waterfronts, map by Island Institute

Figure 5: 33% of coastal towns have water-dependent use zoning protecting less than 3% of Maine's 5,300 mile coastline.



Mapping Maine's Working Waterfront, A Statewide Inventory by the Island Institute.

Table 1: Current statewide waterfront access uses

Access Uses	# Providing Use Access	% of Total
Recreation	924	59%
Commercial Fishing	888	57%
Commercial Business	310	20%
Residential	217	14%
Transportation	140	9%
Marine Construction	73	5%
Public Safety	75	5%
Education	64	4%
Other	54	3%
Aquaculture	38	2%
Industrial	38	2%

Mapping Maine's Working Waterfront, A Statewide Inventory by the Island Institute.

Town	Miles of Coastline	Total # of Access Points	% Public Access	% Private Access	% Restricted Access	Uses	% Comm Fishing Access	% Rec. Access	% All Tide Access	% Critical for Commercial Fishing	Water Dependent Use Zoning
Frenchboro	29.9	14	14.3	85.7	0	CF, RES, TRANS, REC, CB	100	14.3	57.1	92.9	N
Swans Island	82.2	46	15.2	84.8	0	CF, RES, TRANS, REC, AQUA, OTH, CB	69.6	39.1	65.2	58.7	Y
Castine	18.7	6	16.7	83.3	0	CF, RES, REC, ED, OTH, CB, MC, PS	16.7	50	100	0	Y
Stonington	79.1	23	13	82.6	4.3	CF, RES, TRANS, REC, AQUA, ED, CB, MC, PS, IND	91.3	17.4	73.9	82.6	Y
Tremont	51.4	18	27.8	72.2	0	CF, RES, TRANS, REC, CB	83.3	50	61.1	72.2	Y
Southwest Harbor	18.7	13	23.1	69.2	7.7	CF, TRANS, REC, AQUA, CB, MC, PS	69.2	61.5	100	46.2	Y
Penobscot	26.1	3	33.3	66.7	0	CF, REC, CB, MC	66.7	100	33.3	0	N
Sorrento	21.8	3	33.3	66.7	0	CF, REC, CB	100	66.7	100	33.3	N
Gouldsboro	83.6	22	36.4	63.6	0	CF, RES, REC, CB,	81.8	36.4	45.5	81.8	Y
Bar Harbor	39.8	9	44.4	55.6	0	CF, TRANS, REC, AQUA, CB, PS	44.4	100	88.9	22.2	N
Mount Desert	61.6	19	47.4	52.6	0	CF, TRANS, REC, CB, MC	15.8	78.9	94.7	15.8	N
Brooklin	43.2	8	50	50	0	CF, REC, CB, MC	25	62.5	100	0	N
Hancock	37.4	12	50	50	0	CF, RES, REC, OTH, CB	83.3	66.7	58.3	83.3	N
Winter Harbor	45	4	50	50	0	CF, TRANS, REC, CB	50	75	100	25	N
Blue Hill	47.5	3	66.7	33.3	0	CF, REC, CB, MC, PS	66.7	66.7	33.3	0	Y
Brooksville	77.8	3	66.7	33.3	0	CF, REC, CB	100	100	33.3	0	Y
Deer Isle	158.1	8	75	25	0	CF, REC	87.5	75	62.5	37.5	N
Cranberry Isles	24.2	22	77.3	22.7	0	CF, TRANS, REC, ED, CB, MC, PS	22.7	100	95.5	22.7	Y
Bucksport	12.4	3	100	0	0	CF, REC, CB	66.7	100	66.7	0	Y
Ellsworth	11.1	1	100	0	0	CF, REC, ED, PS	100	100	100	100	N
Lamoine	33.6	3	100	0	0	CF, REC, AQUA, ED, PS	66.7	100	100	33.3	Y
Orland	13.3	5	40	0	60	CF, OTH	20	0	80	0	N
Sedgwick	19.1	1	100	0	0	CF, REC, CB	100	100	100	0	N
Sullivan	11.5	2	100	0	0	CF, REC	100	100	100	50	N
Surry	25.6	2	100	0	0	CF, REC, CB	50	100	50	50	N
Trenton	22.7	1	100	0	0	CF, REC	100	100	100	100	N
Verona	13	1	100	0	0	REC	100	100	100	100	N
Franklin	24	0									N
T7 SD	0.3	0									N

Mapping Maine's Working Waterfront, A Statewide Inventory by the Island Institute.

www.AccessingTheMaineCoast.com

The National Working Waterfront Network

MISSION:

Increase the capacity of communities to make decisions, balance diverse uses, ensure access and plan for the future.

NWWN
National Working Waterfront Network

www.WaterAccessUS.com

Developing a WWF Toolkit

1. *Historic Trends*
2. *Economics*
3. *Financing*
4. *Law and Policy*
5. *Tools in Action*

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What does the future hold for WWF and Coastal Access?

- Existing needs continue
- Economic rebound = increase need
- Conversion still central threat – once it is gone….
- Recreational boating
  - Demographics shifts = increased need
  - Industry targeting new markets
- Commercial fishing
  - Few new jobs forecasted, replacement jobs
  - Conversion MAJOR threat as stocks are low
- New needs emerge
  - Sea level rise, climate change
  - Alternative energy
  - New uses

WORKING WATERFRONT LAND

Classified Land as of April 1, 2012

MUNICIPALITY	COUNTY	# of Parcels	Total Acres	Total Valuation	Original Value	W W Value	Difference
BRUNSWICK	CU	1	1	$20,000	$25,000	$20,000	$5,000
CHEBEAGUE ISLAND	CU	1	1.4	$186,400	$233,000	$186,400	$46,600
HARPSWELL	CU	1	0.03	$91,900	$114,900	$91,900	$23,000
LONG ISLAND	CU	1	0.5	$265,703	$332,128	$265,703	$66,425
PORTLAND	CU	1	0.09	$270,500	$338,200	$270,500	$67,700
SCARBOROUGH	CU	1	0.19	$269,600	$296,550	$269,600	$26,950
BROOKSVILLE	HAN	1	0.5	$203,100	$250,100	$203,100	$47,000
GOULDSBORO	HAN	3	0.53	$229,800	$262,100	$229,800	$32,300
FRENCHBORO	HAN	1	0.01	$8,789.00	$10,546	$8,789.00	$1,757.00
PENOBSCOT	HAN	2	2.47	$101,900	$112,090	$101,900	$10,190
TREMONT	HAN	1	1.1	$293,800	$587,600	$293,800	$293,800
CUSHING	KNOX	1	1.25	$15,690	$18,828	$15,690	$3,138
FRIENDSHIP	KNOX	6	2.25	$678,133	$846,591	$678,133	$168,458
OWLS HEAD	KNOX	1	0.25	$360,000	$400,000	$360,000	$40,000
SAINT GEORGE	KNOX	13	12.48	$3,254,198	$4,604,193	$3,254,198	$1,349,995
SOUTH THOMASTON	KNOX	1	0.25	$137,000	$171,250	$137,000	$34,250
VINALHAVEN	KNOX	1	1.55	$422,500	$528,100	$422,500	$85,600
BOOTHBAY	LI	1	0.79	$195,800	$195,800	$195,800	$48,800
BOOTHBAY HARBOR	LI	3	1.21	$733,000	$800,100	$733,000	$67,100
BREMEN	LI	3	20.7	$542,392	$867,665	$542,392	$325,273
BRISTOL	LI	11	5.99	$1,608,600	$2,402,300	$1,608,600	$793,700
DAMARISCOTTA	LI	1	1.29	$161,500	$201,900	$161,500	$40,400
EDGECOMB	LI	2	5.2	$492,660	$591,192	$276,800	$98,532
SOUTHPORT	LI	5	3.3	$2,688,138	$2,956,952	$2,688,138	$13,435,922
WALDOBORO	LI	1	7.2	$302,000	$368,000	$302,000	$66,000
WESTPORT ISLAND	LI	1	3.8	$343,208	$434,000	$343,208	$90,792
GEORGETOWN	SAG	2	4.99	$905,900	$1,050,000	$905,900	$144,100
PHIPPSBURG	SAG	2	4.32	$1,156,200	$1,267,600	$1,156,200	$111,400
EASTPORT	WASH	2	1.56	$84,800	$117,000	$84,800	$32,200
HARRINGTON	WASH	1	8	$397,696	$437,465.60	$397,696	$39,770
JONESPORT	WASH	3	1.52	$165,400	$229,700	$165,400	$64,300
LUBEC	WASH	2	2.11	$118,126	$234,801	$118,126	$116,945
ROQUE BLUFFS	WASH	2	4.1	$65,411	$87,525	$65,411	$22,114
STEUBEN	WASH	1	2.5	$94,500	$228,000	$94,500	$133,500
KENNEBUNKPORT	YORK	1	1.2	$40,000	$50,000	$40,000	$10,000
TOTALS		81.00	105.63	$16,904,344	$21,651,177	$16,688,484	$17,943,011

Maine Revenue Service