Supplement to Livestock, Dairy, and Poultry Situation and Outlook

Aquaculture Outlook

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U.S. Seafood Consumption Flat, Competition Strong

Over the last decade, U.S. consumption of seafood products on a per-capita basis have been relatively flat. This allows for some growth in total consumption due to an increased population, but it doesn't leave room for the development of any new large-scale sectors in the aquaculture industry. The catfish industry has been able to develop to a point where it has captured a number of economies of scale in production, processing, and marketing. Also, the trout industry, because it is so concentrated in Idaho, has garnered some of the benefits of large-scale production. However, these are really the only sectors in aquaculture that have done so. The remainder of the aquaculture industry producing food products have aimed their production at niche markets. There has been a continued call in articles on healthy diets for consumers to incorporate increased fish consumption. However, the seafood industry and the aquaculture industry have not been very successful in producing products that are relatively inexpensive and appeal to a wide proportion of the population. A large percentage of the products of the aquaculture industry are aimed at the more expensive restaurant market.

Domestic fish farmers are expected to face strong competition in the remainder of 2000 and out into 2001 from imports of foreign aquacultural products and other protein sources, especially poultry and pork. A strong U.S. dollar relative to many foreign currencies and a strong U.S. economy are expected to encourage imports of wild harvest seafood and aquacultural products. A number of countries have encouraged the development of aquaculture industries aimed primarily at the export market. These industries serve as a prime source of foreign exchange earnings.

Aquaculture producers will also face an increasing array of products from the domestic poultry and pork industries. The poultry and pork industries are continually trying to expand consumption through a combination of new product development, strong promotional efforts, and a lowering of relative prices due to more cost efficient production methods.

Higher Catfish Sales Expected for 2000

Sales of catfish by growers to processors are expected to total between 610 million and 620 million pounds in 2000, 2 to 4 percent above a year earlier. Over the first 8 months of 2000, sales have totaled 406 million pounds, 3 percent higher than the previous year. Based on the grower inventories reported at the beginning of July for small food-size fish and stockers, catfish sales by growers are expected to remain 2 to 3 percent above the previous year through the remainder of 2000 and into 2001. Farm prices for catfish are expected to remain in the low 70 cents per pound range through the remainder of the year, and the annual average for 2000 is likely to be close to 75 cents a pound.

Catfish farmers have been helped over the last several years by historically low prices for both corn and soybeans. These low prices have lowered the cost of catfish feed to growers and allowed them to expand production even when faced with relatively flat prices for live catfish. The most recent grain price forecasts indicate that catfish growers should expect continued low grain prices for the rest of 2000 and throughout 2001. The farm price of corn in 2001 is now expected to be only about $1.74 a bushel, down about 7 cents from the forecast for 2000. The price for 48 percent protein soybean meal in 2001 is forecast to average

around $167 a ton, up about $25 from 1999, but slightly lower than the forecast for 2000. This is very low on an historical basis, as the average for 1996 and 1997 was approximately $257 a ton.

Catfish Production Expected To Rise in 2001

Catfish growers indicated that their stocks of foodsize fish, stockers, and fingerlings were all down somewhat from 1999. The July 1 National Agricultural Statistics Service (NASS) survey reports fish holdings by growers in the four largest producing States, Mississippi, Alabama, Arkansas, and Louisiana. In the previous 2 years, growers had reported strong increases in inventories for fingerlings and foodsize fish. Growers also reported a strong increase in stocker inventories in 1999. The four largest catfish producing States account for over 90 percent of total production.

The NASS catfish growers reported that as of July 1, 2000, the number of foodsize fish in inventory was estimated at 288 million, down 5 percent from a year earlier. The decreases in inventory occurred in all three size categories. The number of small foodsize fish in inventory fell by 4 percent to 231 million. While this is down from the previous year, it is a 16-percent increase from the mid-year inventory estimate in 1998. For small foodsize fish, higher numbers in Arkansas were more than offset by lower inventories in Alabama, Louisiana, and Mississippi. For medium foodsize fish, (down 8 percent) only Louisiana showed an increase in estimated inventories. Grower's estimates of the foodsize fish inventory for July 1 are a measure of the supply of marketable fish available for processing in the third quarter and most of the fourth quarter of 2000. The drop in the total supply of foodsize fish means that catfish processors are likely to be faced with a somewhat smaller volume of fish but at slightly higher prices. In 1999, large supplies going into the second half of the year resulted in total processing volume to be higher in July to December than it had in the first half of the year. In 1999, farm prices fell in the second half of the year as supplies increased. Over the last 4 months of 2000, prices are expected to stay somewhat higher than the previous year due to somewhat lower supplies and the strength in the foodservice demand as sales there continue to expand.

The July 1, 2000, grower inventory report estimated stockers at 762 million, down 2 percent from the previous year and fingerlings were estimated at 1.8 billion, down slightly from 1999. The catfish stockers and fingerlings in inventory on July 1 are the fish that will reach market size and are available for processing by the end of 2000 and during the first portion of 2001. While the inventory numbers were lower for both stockers and fingerlings, they were considerably higher than the inventory estimates for July 1, 1998. As always, changes in mortality rates and the occurrence of off-flavor problems or lack of them will have a major impact on the number of fish available for processing. The level of stockers and fingerlings that growers estimated they had on hand points toward a relatively strong supply of catfish through the remainder of 2000 and into first-half 2001.

Farm Prices for 2001 Expected To Remain Steady

In 2001, the average farm price for catfish is expected to show little change from 2000's forecasted 75 cents per pound. Based on forecasts of slightly lower total available marketsize fish at the beginning of 2001, farm prices are expected to average in the mid to upper 70 cents a pound range in the first portion of the year. Any decreases in catfish supplies are likely to be partially offset by higher processor inventories. Processor inventories normally increase in the second half of the year, but as of the end of August, processors were reporting inventories of finished products 36 percent higher than the previous year. Again, the foodservice industry, the chief outlet for catfish, has had strong sales so far in 2000 as a strong economy encourages away-from-home food consumption. Catfish processors are expected to again face strong competition from large chicken and pork supplies.

Over the first 8 months of 2000, farm sales to processors totaled 406 million pounds, with an average price of 77.3 cents a pound. This implies gross sales of $313 million for catfish growers, up 6 percent from a year ago. Over the last 4 months of 2000, farm prices for catfish are expected to be slightly higher than in the same period in 1999. For 2000, grower sales of catfish to processing plants are expected to generate between $460 million and $470 million.

Acreage Continues Upward

With favorable feed prices and relatively stable farm prices for catfish, growers have had incentives to expand their operations through additional pond acreage. In the July 2000 Catfish Production report, growers reported they expected to have 179,200 acres of ponds in use between July 1 and December 31, 2 percent higher than the previous year. The increase in acreage was limited to Alabama and Mississippi, as acreage declined slightly in Arkansas and Louisiana. Mississippi again accounted for most of the increase, as its area rose by 3,500 acres. The total acreage use breakout is 145,100 acres for foodsize fish production, 24,400 acres for fingerling production, and 5,600 for broodfish production. During the second half of 2000, growers reported they expected 8,860 acres of catfish ponds to be undergoing renovation or construction.

Processor Revenues Higher

Over the first 8 months of 2000, catfish processors sold 206 million pounds of product, up 4 percent from a year earlier. For all of 1999, processor sales are forecast at around 310 million pounds or a gain of 5 percent from the previous year. From January through August, prices for catfish products have averaged $2.41 a pound, 3 percent above the same period in 1999. Most of the price increase is due to stronger sales for filleted products. With both increased sales volume and average prices, gross processor revenues from catfish products over the first 8 months of 2000 reached $496 million, 7 percent above the same period in 1999. Processor revenues are expected to reach between $730 million and $745 million in 2000.

During the first two-thirds of 2000, processor sales have been strong in most categories. Sales in 2000 have been above the previous year in 6 of the 8 months so far. Total sales through August have been 205 million pounds, 4 percent higher than in the same period in 1998. Overall sales of fresh and frozen catfish have been higher than the previous year, but sales of some product types have fallen. As in many recent years, sales of filleted products have been the major growth area for catfish processors. Fresh filleted sales were up 1 percent, and frozen filleted sales rose by 11 percent. Together, filleted sales account for 60 percent of all catfish product sales. Since fillet products are normally the most expensive, the faster growth in filleted sales has also meant a steady upward growth in the average price received by processors.

U.S. Tilapia Consumption Increases

Both domestic production and imports of tilapia are continuing to expand. The latest estimates of the domestic tilapia industry from the Census of Aquaculture shows the value of production in 1998 at $24 million from 148 farms. Unlike many other aquaculture species, domestic tilapia production is widely dispersed in the United States. The Southern region has the largest number of farmers reporting to the Census, but the growers in the Western region reported the largest amount of sales.

Tilapia production is expected to be higher in 2000 as new production sites have come on-line. The long-term growth prospects for domestic tilapia production are somewhat constrained unless domestic growers can find a way to compete effectively in the processed fish segment of the tilapiia market.

While U.S. tilapia production has increased greatly over the last several years, U.S. imports of tilapia are considerably higher. U.S. tilapia imports on a liveweight basis were 94 million pounds in 1998 and then rose to 134 million pounds in 1999. Tilapia imports in the first 6 months of 2000 totaled 40 million pounds, 6 percent higher than the previous year. For the first time since tilapia imports have been reported separately, imports of frozen whole tilapia declined 2 percent in first-half 2000. While imports of frozen whole fish at 27.2 million pounds continue to dominate, the growth in imports is now coming from higher shipments of fresh and frozen fillets. Total imports of fresh fillets increased 41 percent to 7.8 million pounds and imports of frozen fillets rose 15 percent to 5 million pounds.

While the amount of tilapia imported continues to grow, the pattern of shipments changed dramatically in the first half of 2000. Taiwan has always dominated frozen whole imports, accounting for virtually 100 percent of imports as recently as the first half of 1998. However, in the first half of 2000, shipments of frozen whole fish from Taiwan were 14.8 million pounds, down 41 percent from the previous year and only 54 percent of all imports of frozen whole tilapia. Most of this decrease was countered by an almost 10-million-pound increase in shipments from China. If China decides to divert even a small percentage of their pond acreage currently in carp production to tilapia, they could become the world's largest supplier in a short time.

Over the last 2 years imports of fresh fillets have almost doubled, and Ecuador has moved from a minor exporter to the largest supplier. In the first 6 months of 2000, Ecuador shipped 4.4 million pounds, 43 percent of all fresh fillets. China is now the largest supplier of frozen fillets, and China and Taiwan accounted for 74 percent of all frozen fillet imports.

The increase in the percentage of total imports coming in the form of fillets boosted the average value of tilapia imports. The value of all tilapia imports rose to $46.4 million in the first half of 2000. The average price for frozen whole tilapia and fresh fillets both increased, while prices for frozen fillets fell slightly. With tilapia imports somewhat heavier in the second half of the year, tilapia imports for 2000 are expected to approach 90 million pounds on a product-weight basis and 120 million to 130 million pounds on a live-weight basis. Prices may decline slightly in the second half of 2000, due somewhat to higher availability of wild salmon, but overall value is expected to top $90 million.

Tilapia imports are expected to remain above their year-earlier levels in the second half of 2000 and into 2001. As tilapia becomes a more and more common item in the restaurant trade, the expectation is that a greater and greater percentage of total tilapia imports will be in the form of filleted products. While this may slow the growth of imports on a quantity basis, it will boost the average price. The pace of import growth might also slow if the U.S. dollar weakens generally against Asian currencies, as Asian countries accounted for almost 80 percent of all tilapia shipments in first-half 2000.

Atlantic Salmon Imports Higher

U.S. imports of Atlantic salmon in first-half 2000 totaled 137.6 million pounds and $359 million, up 17 and 15 percent from first-half 1999. As they had in 1999, all three Atlantic salmon import categories (fresh whole fish, frozen whole fish, and fresh and frozen fillets) showed increases in quantity. The largest growth was from the fresh and frozen fillets category. Imports of filleted products in first-half 2000 were 73 million pounds, over half of total imports on a quantity basis. This is a considerable change from earlier years. As recently as the first half of 1997, imports of fresh whole product accounted for almost two-thirds of all imports. Shipments of filleted products rose 29.6 percent to 73 million pounds. One indication of the strength of the salmon market is that although the quantity of salmon fillets rose 30 percent, their average price stayed constant, pushing total value up 30 percent. The value of filleted products totaled $209 million in the first half of 2000, passing those of fresh and frozen fish combined and accounting for 58 percent of the value of all Atlantic salmon imports.

In 1999, imports from Canada and Chile declined due to higher shipments from other countries. In 2000, the pattern of growth reverted to that seen in earlier years. Over the first half of 2000, Canada and Chile accounted for 83 percent of all imports. In the first half of 2000, imports rose from the United Kingdom and the Faroe Islands, but declined from Iceland and Norway. The role of largest supplier of Atlantic salmon changed hands. Over the first 6 months of 2000, shipments from Chile totaled just over 60 million pounds, about 5.5 million pounds higher than Canada. The two countries operate for the most part in different segments of the market. Due to its distance from its prime markets, the United States Japan, and the European Union (EU), Chile has concentrated on producing filleted products. With its relatively easy access to the U.S. market, Canada ships mostly fresh whole fish. With the continued weakness in the Canadian dollar relative to the U.S. dollar, imports from Canada are expected to continue to expand, but the

filleted segment of the market seems to be expanding more rapidly. This would favor higher growth in shipments from Chile.

Normally, salmon imports are relatively constant throughout the year with a somewhat stronger period in November and December. If this holds true for the rest of 2000, shipments are expected to reach between 280 and 290 million pounds and to be between $730 million and $740 million in value. The short-term outlook for salmon exporters to the United States continues to be good. A strong U.S. economy is expected to both provide a strong underpinning to restaurant sales and to keep the U.S. dollar strong relative to most foreign currencies. A strong dollar is expected to keep prices relatively steady, and strong restaurant demand provides a prime outlet for Atlantic salmon imports.

Shrimp Imports Decline Again

During the first 6 months of 2000, U.S. shrimp imports were 291 million pounds, down 3 percent from the same period in 1999 and 5 percent lower than in the first half of 1998. Shrimp imports for calendar year 1999 were higher than the previous year due to extremely strong demand in the second half of the year. Shipments in the second half of 2000 are not expected to be as strong as a year earlier when demand rose due to the expected lavish celebrations at the turn of the century.

While the total volume of imported shrimp fell 3 percent, the total value rose 6 percent to $1.288 billion. The decrease in volume was the result of lower imports of frozen shrimp (down almost 20 million pounds). In contrast, imports of fresh shrimp rose slightly, and imports of prepared shrimp products were almost 12 million pounds higher.

While imports of shell-on or peeled frozen shrimp are still the largest import category, imports of prepared shrimp products (canned, cooked, etc.) have been growing at a faster pace. This is the same type of pattern seen in Atlantic salmon and tilapia imports. To maximize revenues, producing countries are switching to providing a further-processed product. Since most farmed shrimp production is in developing countries and exports are primarily to developed countries, the further processing which is normally labor intensive, takes place in countries that have lower wage rates. Also, the further processing often lowers the weight of the product, thus lowering the freight rate as a percentage of the product's value.

Most of the decline in imports was due to smaller shipments from Mexico and Ecuador. Shrimp imports from these countries have dropped dramatically in the last 2 years. In the first half of 1998, shrimp imports from Mexico and Ecuador totaled almost 110 million pounds and had a value of $483 million. By the first half of 2000, shipments from Mexico and Ecuador had fallen to only 33 million pounds valued at only $169 million. The presence of El Nino and La Nina plays havoc with the farmed shrimp industry, upsetting the upwelling of cold water on the west coast of South America and lowering the number of female shrimp used in shrimp hatcheries.

Smaller exports from Mexico and Ecuador were partially countered by higher shipments from various Asian countries. Imports from Thailand increased the most, rising by 14 percent to 101 million pounds. Thailand is the dominant supplier of prepared shrimp products to the U.S. market, with shipments in the first half of 2000 just under 30 million pounds and valued at $140 million. Shipments from China almost doubled to 15 million pounds. Much of the increase in the "other" category (up 12 percent) was due to higher shipments from India and Bangladesh.

Imports of shrimp in 2000 are not expected to match the record 731 million pounds imported in 1999. However, with the domestic economy continuing to stay in an expansion mode, shrimp imports are expected to remain strong for the rest of 2000. For 2000, shrimp imports are forecast to reach between 690 and 700 million pounds and be valued at between $3 and $3.1 billion.

While the changes in the quantities of shrimp imported in the first half of 2000 varied greatly depending on the type of product, the per-unit values of all shrimp products increased. On the quantity side, imports of frozen shrimp fell by 7 percent as imports from Mexico and Ecuador dropped steeply. In the first half of 1998, imports from these two countries accounted for almost 110 million pounds of frozen shrimp. By the first half of 2000, imports from these same two countries only totaled 33 million pounds. The quantity may have been declining, but the average price for frozen shrimp was up 40 cents a pound to $4.45. This increase raised the average price to about the level it had been in the first half of 1998.

The quantities imported of fresh and prepared shrimp in the first half of 2000 were both up strongly from the previous year. Imports of fresh shrimp were up 17 percent from the previous year, but the fresh shrimp segment is only a minor part of total shrimp imports. Prices for fresh shrimp have risen rapidly over the last 2 years, going from $3.99 in 1998 to $5.99 a pound in 2000. Even though prices generally rose for shrimp products, prices for fresh shrimp more closely reflect the production problems that have befallen the Mexican and Ecuadorian shrimp industries.

U.S. imports of prepared shrimp products are dominated by supplies from Thailand. During the first 6 months of 2000, shrimp from Thailand made up 70 percent of all the prepared shrimp products exported to the United States. In total, imports of prepared shrimp products rose 37 percent from the previous year. Even though the quantity of prepared shrimp products being imported was rapidly increasing, the average price rose 15 cents, to $4.26 a pound. With declining production from the major Western Hemisphere shrimp suppliers, prices for most shrimp products are expected to remain strong through the remainder of 2000 and into 2001. Average shrimp prices in 2000 may not be as strong as in 1998, but prices are expected to be strong enough to offset any decline in quantity and yield a higher value.

Mussel and Clam Exports Down, Oyster Exports Increase

Over the first 6 months of 2000, U.S. shipments of oysters, mussels, and clams totaled 4.0 million pounds, down 4 percent from first-half 1999. Mussel exports dropped to 780,000 pounds, down 12 percent from the previous year, but still considerably higher than in 1997 or 1998. Clam exports dropped 16 percent from the first half of 1999 and have fallen for the second consecutive year. The value of clam and mussel exports declined as unit prices for the various products remained relatively steady. Oyster exports increased by 25 percent to 1.4 million pounds, about even with exports in 1997. A strong U.S. dollar has made exports relatively more expensive. The export forecast for the remainder of 2000 and into 2001 is for a stronger export market, as the Korean economy has been rapidly strengthening. Over the longer term, the outlook for U.S. mollusk exports will depend largely on improvements in the Japanese economy. Japan has been the largest market for our mollusk exports.

Mollusk8 Imports Increase

While a strong dollar had a depressing effect on U.S. mollusk exports, the combination of a strong U.S. dollar and a booming economy led to an increased demand for imported mollusk products. Over the first half of 2000, imports for clams, mussels, and oysters all were higher. Imports of oysters and mussels have now risen for 4 consecutive years.

Mussels are the fastest growing U.S. mollusk import, having more than doubled in quantity and value in the last 4 years. In the first half of 2000, mussel imports reached $25.5 million and 23 million pounds. Even while the quantity of imports increased 20 percent, the demand was such that the unit price was rising. The value of mussel imports in the first half of 2000 was up 40 percent.

While not all the mussel products imported are identified as farmed or wild, the majority of the products can be assumed to be farmed products. Most mussel imports come from either Canada or New Zealand, two countries that have extensive mussel cultivation. In contrast, the 1998, Census of Aquaculture reports only 29 farms growing mussels in the United States and the sales value as being $3.1 million. With the U.S.

dollar continuing to be strong versus the Canadian dollar and foodservice and restaurant sales strong, mussel imports are expected to increase in second-half 2000 and into 2001.

The demand for oyster and clam products was also strong in the first half of 2000. Clam imports were 19 percent higher than a year earlier at 4.5 million pounds and oyster imports totaled 7.6 million pounds, up 7 percent. As was the case for mussels, the average price for clam and oyster imports also was higher. The value of clam imports rose 26 percent, while the value of oyster imports was up 17 percent.

Ornamental Fish Imports Flat, Exports Down

The same economic factors that depressed exports of mollusks and encouraged imports was at work in the ornamental fish market. U.S. exports fell in first-half 2000 to $4.2 million, down 34 percent from the previous year. The largest markets for U.S. ornamental fish are in Asia, and Hong Kong is the single largest market. Although the economies in most Asian countries are recovering, U.S. exports to Asia continue to be weak. Over the last 4 years, the value of ornamental fish exports has fallen almost 50 percent.

The value of ornamental fish imports totaled $20.5 million in first-half 2000, down just slightly from the previous year. However, the decline in the value of imports has been happening for some time. Shipments of ornamental fish to the United States dropped in each of the last 4 years, a decline of 27 percent from 1996. Since the statistics do not show the number of fish or the species of fish being imported it makes it impossible to determine if the prices for imported ornamental fish are declining or if the decline in imports is related to lower shipments of particular species.

The 1998 Census of Aquaculture shows that ornamental fish production was one of the most valuable sectors in U.S. aquaculture. Total sales were $69 million, with farmers in Florida accounting for over 80 percent of all sales. With this dominance by the Florida ornamental fish industry, it is no surprise that tropical fish sales accounted for 82 percent of all ornamental fish sales. The remainder of the sales were divided into sales of koi and ornamental goldfish, with a small amount of “other” ornamental fish.

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Catfish Sales and Prices

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual total
Catfish sold to processors							1,000 pounds 1/						
1990	33,066	31,884	33,120	30,980	31,542	28,967	29,540	31,108	27,566	29,211	27,913	25,538	360,435
1991	32,206	33,036	35,951	31,205	31,322	31,588	32,720	32,912	33,244	35,400	31,114	30,172	390,870
1992	36,200	39,228	45,048	41,177	39,111	36,813	36,128	37,958	37,857	39,212	35,073	33,562	457,367
1993	40,327	40,277	43,521	39,920	37,030	35,496	37,086	37,706	37,072	39,472	36,557	34,549	459,013
1994	36,714	35,035	40,446	34,494	34,163	34,595	35,901	39,813	38,716	39,072	36,054	34,266	439,269
1995	38,807	38,515	42,200	36,588	37,030	36,047	35,800	38,827	37,634	39,456	34,119	31,863	446,886
1996	38,475	38,004	46,376	38,557	39,517	36,752	39,025	40,463	38,807	42,070	37,203	36,874	472,123
1997	42,409	45,067	48,431	45,721	43,409	42,282	43,376	44,154	43,472	46,275	40,137	40,216	524,949
1998	46,723	47,606	53,761	49,393	45,218	46,244	46,383	47,739	46,579	47,904	43,224	43,581	564,355
1999	48,723	48,891	56,310	46,830	47,703	48,445	50,074	50,372	50,414	52,407	48,118	48,341	596,628
2000	50,552	50,942	56,856	48,781	48,424	48,011	49,023	53,204					405,793
Average price paid by processors for farm-raised catfish							Cents per pound 1/						
1990	72.0	74.0	78.0	78.0	78.0	78.0	76.0	76.0	76.0	76.0	75.0	72.0	75.8
1991	69.0	69.0	69.0	69.0	66.0	65.0	63.0	60.0	59.0	58.0	57.0	53.0	63.1
1992	53.0	56.0	60.0	63.0	63.0	61.0	59.0	58.0	59.0	61.0	62.0	63.0	59.8
1993	63.0	67.0	70.0	71.0	72.0	72.0	72.0	73.0	73.0	73.0	73.0	73.0	71.0
1994	74.0	77.0	79.0	80.0	80.0	80.0	80.0	80.0	80.0	77.0	77.0	77.0	78.4
1995	78.0	79.0	79.0	79.0	79.0	79.0	79.0	79.0	78.0	78.0	78.0	78.0	78.6
1996	77.0	78.0	78.0	78.0	79.0	79.0	79.0	78.0	77.0	76.0	75.0	73.0	77.3
1997	73.0	73.0	73.0	73.0	73.0	72.0	71.0	70.0	69.0	69.0	69.0	69.0	71.2
1998	69.0	73.0	78.0	79.0	79.0	78.0	76.0	74.0	73.0	71.0	70.0	70.0	74.2
1999	70.3	71.4	73.2	75.6	77.7	77.5	76.8	74.3	72.8	71.6	71.3	71.6	73.7
2000	74.4	78.8	78.9	78.9	78.5	78.6	76.0	74.1					77.3
Catfish sold by processors							1,000 pounds						
1990	15,771	16,477	16,420	15,444	16,118	15,158	15,214	16,257	15,287	15,212	13,488	12,300	183,146
1991	15,794	17,113	17,536	15,914	16,716	15,983	16,878	17,893	16,697	18,546	15,486	15,253	199,809
1992	18,698	21,100	22,425	19,923	19,454	18,874	19,676	19,559	19,500	19,615	16,814	15,698	231,336
1993	20,273	20,774	21,309	19,377	19,211	19,103	20,086	19,758	19,162	19,371	17,709	17,342	233,475
1994	18,772	19,363	20,001	17,112	18,027	17,173	18,024	18,983	17,983	19,151	16,427	15,461	216,477
1995	19,191	20,008	21,702	18,649	19,169	18,631	18,157	20,187	18,660	19,920	16,680	16,018	226,972
1996	20,322	20,613	22,704	20,276	20,669	18,074	18,719	20,217	19,642	20,842	18,204	16,898	237,180
1997	20,746	23,058	24,624	22,154	22,444	21,471	21,866	22,548	21,518	23,408	19,645	18,278	261,760
1998	23,576	26,650	26,207	23,195	22,960	23,002	22,973	24,089	22,805	23,241	21,581	21,119	281,398
1999	23,107	25,780	28,544	23,488	23,964	23,720	25,069	24,618	24,430	25,229	22,344	22,372	292,665
2000	25,412	25,354	29,161	24,924	24,763	25,342	24,911	25,847	0	0	0	0	205,714
Average price received by processors for all catfish							Cents per pound						
1990	214.5	221.3	228.3	228.8	226.9	226.3	226.9	223.8	222.6	224.1	221.9	222.0	224.0
1991	217.5	216.3	217.4	216.2	215.5	215.0	211.5	204.2	203.5	200.1	196.9	189.4	208.6
1992	186.4	193.1	202.3	206.3	207.6	203.4	200.7	200.1	197.9	201.7	203.4	200.7	200.3
1993	202.7	211.2	219.6	222.5	223.2	221.3	218.2	219.7	220.5	222.8	221.7	221.1	218.7
1994	221.5	229.1	238.9	241.1	243.0	245.7	243.1	246.2	242.4	236.8	238.9	237.0	238.6
1995	235.0	239.7	241.8	243.7	244.5	240.7	241.6	241.9	241.2	237.8	236.4	234.7	239.9
1996	232.5	235.7	236.1	237.3	237.4	244.5	243.1	238.8	236.1	233.8	233.2	228.7	236.4
1997	227.8	229.8	230.4	226.7	228.4	226.5	225.4	225.8	225.3	220.4	220.6	223.6	225.9
1998	219.5	227.7	237.1	237.5	239.4	234.4	234.8	232.2	229.5	226.4	226.4	224.1	230.8
1999	225.6	225.9	231.8	236.1	239.8	239.5	239.4	234.7	236.9	235.8	235.3	230.9	234.3
2000	235.1	240.0	244.4	244.7	245.0	237.5	238.8	239.1					240.6

1/ Live weight.

Source: Monthly Catfish Processing Report, NASS, USDA.

Catfish: Supply, sales, prices, and inventory

Item	1999 Aug.	Sept.	Oct.	Nov.	Dec.	2000 Jan.	Feb.	Mar.	Apr.	May	June	July	2000 Aug.
Supply						1,000 lbs.							
Grower sales 1/	50,372	50,414	52,407	48,118	48,341	50,552	50,942	56,856	48,781	48,424	48,011	49,023	53,204
Processor sales	24,618	24,430	25,229	22,344	22,372	25,412	25,354	29,161	24,924	24,763	25,342	24,911	25,847
Fresh	9,768	9,487	10,048	8,679	8,682	9,611	9,686	11,673	10,408	9,946	9,672	9,481	9,882
Whole	3,271	3,583	3,561	3,209	3,313	3,496	3,396	4,031	3,655	3,483	3,581	3,491	3,545
Fillets	5,002	4,550	4,811	4,171	4,142	4,686	4,853	5,957	5,206	5,099	4,792	4,650	4,899
Other	1,495	1,354	1,676	1,299	1,227	1,429	1,437	1,685	1,547	1,364	1,299	1,340	1,438
Frozen	14,850	14,943	15,181	13,665	13,690	15,801	15,668	17,488	14,516	14,817	15,670	15,430	15,965
Whole	1,144	1,051	1,025	1,043	972	1,231	1,302	1,421	1,219	1,212	1,168	1,308	1,108
Fillets	9,445	10,160	10,634	9,414	9,125	10,654	10,287	11,651	9,910	10,275	10,349	10,076	10,830
Other	4,261	3,732	3,522	3,208	3,593	3,916	4,079	4,416	3,387	3,330	4,153	4,046	4,027
Processor inventory 2/	7,515	8,504	9,713	10,894	12,551	12,862	12,568	11,921	11,138	10,996	10,313	9,749	10,264
Fresh	740	796	749	660	660	799	894	788	614	768	759	779	892
Whole	210	177	192	159	169	234	233	203	145	232	212	203	187
Fillets	413	494	437	392	397	460	520	494	399	428	448	462	578
Other	117	125	120	109	94	105	141	91	70	108	99	114	127
Frozen	6,775	7,708	8,964	10,234	11,891	12,063	11,674	11,133	10,524	10,228	9,554	8,970	9,372
Whole	611	644	719	729	1,078	1,403	1,639	1,552	1,419	1,291	1,620	943	714
Fillets	4,000	4,599	5,667	6,515	7,448	7,640	7,498	6,886	6,163	5,596	5,084	5,598	6,200
Other	2,164	2,465	2,578	2,990	3,365	3,020	2,537	2,695	2,942	3,341	2,850	2,429	2,458
Prices													
Farm price 3/	0.74	0.73	0.72	0.71	0.72	0.74	0.79	0.79	0.79	0.79	0.79	0.76	0.74
Processor prices	2.35	2.37	2.36	2.36	2.31	2.35	2.40	2.45	2.45	2.45	2.38	2.39	2.40
Fresh	2.25	2.21	2.19	2.20	2.18	2.21	2.27	2.30	2.28	2.30	2.27	2.27	2.28
Whole	1.63	1.61	1.63	1.59	1.57	1.63	1.67	1.69	1.70	1.68	1.63	1.65	1.70
Fillets	2.85	2.85	2.83	2.84	2.83	2.82	2.87	2.89	2.88	2.88	2.90	2.90	2.88
Other	1.62	1.66	1.57	1.65	1.66	1.66	1.69	1.69	1.66	1.71	1.71	1.72	1.69
Frozen	2.41	2.47	2.47	2.45	2.39	2.44	2.48	2.54	2.56	2.54	2.44	2.46	2.47
Whole	2.01	2.01	2.00	2.02	2.01	2.02	2.06	2.08	2.07	2.06	2.00	2.00	2.01
Fillets	2.82	2.81	2.78	2.77	2.77	2.81	2.86	2.88	2.88	2.86	2.86	2.86	2.82
Other	1.60	1.67	1.66	1.67	1.52	1.55	1.67	1.81	1.81	1.74	1.53	1.60	1.64

1/ Total live weight of fish delivered for processing. 2/ Inventory at end of reporting period. 3/ Live weight.

Source: NASS, USDA

Catfish: Inventory numbers, in thousands, as of July 1 1/

State	Broodfish				Fingerling/fry				Stockers			
	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
Alabama	129	110	125	150	67,442	78,158	95,200	110,000	51,228	50,733	56,600	61,100
Arkansas	188	141	145	220	235,680	258,500	325,000	284,000	103,980	115,050	116,600	115,800
Louisiana	52	31	55	64	124,000	99,160	72,500	99,500	46,450	39,365	49,600	26,300
Mississippi	703	836	835	835	1,151,477	1,193,366	1,273,000	1,266,000	493,724	417,948	552,900	558,800
Total	1,072	1,118	1,160	1,269	1,578,599	1,629,184	1,765,700	1,759,500	695,382	623,096	775,700	762,000

State	Small foodsize				Medium foodsize				Large foodsize			
	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
Alabama	29,999	26,720	35,400	32,200	10,521	9,403	13,200	10,600	923	886	1,180	870
Arkansas	19,350	31,400	32,850	33,800	9,045	9,525	11,800	8,800	850	970	1,110	980
Louisiana	17,450	11,330	17,800	14,600	5,800	4,095	7,360	8,350	600	550	490	790
Mississippi	109,879	130,042	154,500	150,800	25,314	34,377	24,400	24,350	1,982	2,348	2,210	1,360
Total	176,678	199,492	240,550	231,400	50,680	57,400	56,760	52,100	4,355	4,754	4,990	4,000

1/ July 1 inventory data are only collected from the four largest producing States.

Source: Catfish Growers Survey, NASS, USDA.

Quantity and value of U.S. imports and exports of selected seafood products, January to June

Commodity	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
Exports			$1,000					1,000 lb.		
Ornamental fish	8,289	8,368	5,756	6,393	4,224	-	-	-	-	-
Trout, live	862	697	278	293	148	-	-	-	-	-
Trout, fresh & frozen	1,609	1,184	1,254	1,841	1,827	1,036	756	831	1,006	1,082
Atlantic salmon, fresh	9,346	8,979	8,107	14,175	19,127	3,900	3,642	3,428	6,402	8,899
Pacific salmon, fresh 1/	9,345	6,524	6,459	20,254	7,529	4,328	3,748	4,189	8,967	4,792
Atlantic salmon, frozen	340	429	261	119	304	146	157	154	50	154
Pacific salmon, frozen 1/	53,716	42,951	22,341	37,838	55,541	33,197	29,162	16,025	25,597	34,287
Canned & pre. salmon 2/	57,509	58,992	59,484	46,176	60,537	36,565	35,889	30,049	26,975	34,599
Shrimp, frozen	19,401	21,744	22,012	23,552	28,866	4,799	5,670	5,392	6,715	7,563
Shrimp, fresh & pre. 3/	33,571	27,674	21,313	19,317	24,593	10,295	7,754	5,732	5,735	6,027
Oysters 4/	2,650	2,844	2,554	2,546	3,116	1,010	1,466	1,133	1,158	1,442
Mussels 5/	1,785	386	658	939	835	931	333	617	803	708
Clams 6/	3,564	4,509	4,167	3,608	3,223	2,202	2,390	2,575	2,235	1,880
Imports			$1,000					1,000 lb.		
Ornamental fish	28,018	25,893	23,943	20,516	20,469	-	-	-	-	-
Trout, live	43	65	39	78	21	-	-	-	-	-
Trout, fresh & frozen	2,669	3,366	4,869	4,228	3,804	1,724	2,566	2,872	2,546	2,339
Atlantic salmon, fresh	125,520	165,118	228,759	282,112	319,410	62,256	69,207	95,388	105,722	122,956
Pacific salmon, fresh 1/	43,587	40,132	35,252	22,470	22,786	18,369	15,818	16,681	9,688	9,550
Atlantic salmon, frozen	12,057	14,451	20,219	28,592	39,466	5,057	6,312	8,622	11,764	14,606
Pacific salmon, frozen 1/	5,841	9,906	10,835	10,840	9,170	3,377	7,855	8,502	8,695	5,420
Canned & pre. salmon 2/	8,723	7,567	6,463	9,245	13,937	2,588	1,442	1,280	2,426	4,713
Shrimp, frozen	886,531	976,291	1,207,528	1,079,753	1,084,143	220,035	226,959	269,071	266,823	246,906
Shrimp, fresh & pre. 3/	90,220	121,246	178,535	133,052	189,252	25,033	24,932	35,478	32,116	43,838
Oysters 4/	13,543	13,665	15,280	14,309	16,792	5,073	5,207	6,942	7,097	7,603
Mussels 5/	10,647	12,252	14,916	18,232	25,472	10,203	13,523	16,538	19,136	22,979
Clams 6/	3,436	3,395	2,817	3,180	3,995	3,086	2,826	3,152	3,837	4,553
Tilapia 7/	20,269	24,622	25,388	35,421	46,421	18,550	24,912	29,907	37,644	39,962

NA - Not available. 1/ Also includes salmon with no specific species noted. 2/ Includes smoked and cured salmon. 3/ Shrimp, canned, breaded, or prepared. 4/ Oysters, fresh or prepared. 5/ Mussels, fresh or prepared. 6/ Clams, fresh or prepared. 7/ Frozen whole fish plus fresh and frozen fillets. Data first available in July 1992.

Source: Bureau of the Census, U.S. Department of Commerce.

U.S. Atlantic salmon imports, volume by country, (January to June)

Country	Fresh				Frozen				Fillets 1/				Total			
	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
	1,000 Pounds															
Canada	38,204	45,631	43,575	46,110	12	5	5	8	2,278	4,413	6,110	8,352	40,494	50,049	49,690	54,470
Chile	10,127	7,973	3,309	2,826	1,512	1,121	791	1,161	18,229	37,359	38,234	56,134	29,869	46,453	42,334	60,121
Iceland	453	1,185	2,230	2,017	-	-	-	-	10	40	722	76	464	1,225	2,951	2,094
Norway	12	22	623	302	971	1,555	2,358	3,362	764	1,465	8,652	6,134	1,746	3,042	11,633	9,798
Faroe Is.	177	-	830	2,130	643	598	1,120	251	81	-	89	82	901	598	2,040	2,463
UK	1,168	1,195	5,747	6,025	13	1	-	39	31	412	2,075	1,850	1,212	1,608	7,822	7,914
Other	37	37	137	171	563	853	617	408	232	144	263	122	833	1,034	1,017	702
Total	50,179	56,044	56,451	59,581	3,715	4,133	4,891	5,230	21,625	43,834	56,145	72,751	75,519	104,010	117,486	137,562

U.S. Atlantic salmon imports, value by country, (January to June)

Country	Fresh				Frozen				Fillets 1/				Total			
	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
	1,000 Dollars															
Canada	101,171	111,451	114,674	113,289	9	17	27	21	8,356	15,560	23,335	30,566	109,537	127,028	138,036	143,877
Chile	16,879	13,798	6,800	5,401	2,926	2,549	1,589	2,847	39,514	89,723	103,786	150,922	59,319	106,070	112,175	159,171
Iceland	732	2,004	3,348	3,804	-	-	-	-	31	126	1,586	264	764	2,129	4,934	4,068
Norway	28	44	1,083	576	1,843	3,065	4,527	6,611	2,449	4,669	25,944	20,909	4,320	7,778	31,553	28,096
Faroe Is.	269	-	1,440	4,216	1,176	1,049	1,876	468	129	-	316	247	1,575	1,049	3,632	4,931
UK	2,141	2,131	11,972	11,907	81	10	-	40	65	906	5,457	5,321	2,288	3,047	17,429	17,268
Other	61	145	980	357	1,060	1,528	1,296	787	644	203	667	322	1,765	1,876	2,944	1,466
Total	121,283	129,571	140,296	139,550	7,096	8,218	9,315	10,774	51,188	111,188	161,092	208,552	179,567	248,978	310,704	358,876

1/ Includes both fresh and frozen fillets.

Source: Bureau of the Census, U.S. Department of Commerce.

U.S. tilapia imports, volume by country, (January to June)

Country	Whole, frozen				Fillets, fresh				Fillets, frozen				Total			
	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
	1,000 Pounds															
Mexico	-	-	-	-	-	0	2	-	-	-	14	-	-	0	16	-
Honduras	91	2	-	19	129	480	642	1,254	4	103	41	-	225	585	683	1,273
Nicaragua	82	1	-	-	8	1	17	-	105	25	12	-	196	27	29	-
Costa Rica	-	0	-	-	1,814	2,445	2,673	2,799	-	-	-	-	1,814	2,446	2,673	2,799
Jamaica	2	-	-	-	314	270	208	196	105	115	92	22	420	385	300	218
Colombia	-	-	-	-	12	-	-	5	-	-	-	-	12	-	-	5
Ecuador	305	6	221	19	849	665	1,879	3,399	129	109	48	177	1,283	781	2,148	3,595
Thailand	9	52	7	43	-	-	-	-	215	294	114	124	224	345	121	167
Indonesia	-	-	-	2	-	-	-	-	1,095	1,012	1,291	917	1,095	1,012	1,291	919
China	114	-	2,356	12,136	-	-	-	50	-	84	249	1,983	114	84	2,605	14,170
Taiwan	18,367	22,855	25,174	14,758	-	116	141	52	879	1,164	2,294	1,695	19,246	24,136	27,609	16,505
Other	212	-	13	183	30	59	13	92	44	48	144	38	287	108	170	312
Total	19,182	22,917	27,770	27,160	3,158	4,037	5,575	7,846	2,576	2,953	4,298	4,956	24,916	29,907	37,644	39,962

U.S. tilapia imports, value by country, (January to June)

Country	Whole, frozen				Fillets, fresh				Fillets, frozen				Total			
	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
	1,000 Dollars															
Mexico	-	-	-	-	-	1	5	-	-	-	12	-	-	1	17	-
Honduras	23	5	-	41	357	1,205	1,581	3,188	4	259	49	-	384	1,470	1,630	3,229
Nicaragua	74	2	-	-	20	3	48	-	144	54	20	-	239	59	67	-
Costa Rica	-	1	-	-	3,817	5,089	5,617	6,459	-	-	-	-	3,817	5,091	5,617	6,459
Jamaica	4	-	-	-	965	825	619	591	200	191	166	40	1,168	1,017	785	631
Colombia	-	-	-	-	30	-	-	17	-	-	-	-	30	-	-	17
Ecuador	187	11	282	57	1,714	1,202	3,490	10,207	281	148	92	386	2,182	1,362	3,865	10,650
Thailand	10	36	6	31	-	-	-	-	622	854	267	267	632	890	273	297
Indonesia	-	-	-	2	-	-	-	-	2,396	2,211	2,759	2,120	2,396	2,211	2,759	2,122
China	64	-	1,307	6,750	-	-	-	109	-	218	505	3,344	64	218	1,812	10,204
Taiwan	11,851	10,891	13,765	8,697	-	305	121	135	1,534	1,750	4,512	3,472	13,385	12,946	18,399	12,304
Other	142	-	5	139	81	59	25	266	101	65	168	103	324	124	198	508
Total	12,355	10,946	15,366	15,718	6,984	8,691	11,505	20,972	5,282	5,752	8,550	9,732	24,621	25,388	35,421	46,422

Source: Bureau of the Census, U.S. Department of Commerce.

U.S. Shrimp imports in 1,000 pounds (January to June)

	Frozen			Fresh			Prepared			Total		
Country	1998	1999	2000	1998	1999	2000	1998	1999	2000	1998	1999	2000
Mexico	26,410	13,084	8,910	32	67	74	17	21	36	26,459	13,172	9,020
Ecuador	83,088	72,917	23,824	2	-	-	266	49	576	83,355	72,967	24,399
Thailand	55,209	67,108	71,553	257	185	197	23,644	22,017	29,754	79,110	89,310	101,503
Indonesia	12,389	15,703	16,440	147	16	144	942	662	1,118	13,478	16,381	17,702
Philippines	1,491	1,614	1,548	12	22	1	237	316	342	1,740	1,952	1,890
China	6,279	6,383	14,370	107	348	351	367	419	351	6,753	7,150	15,072
Others	84,205	90,013	110,262	2,537	583	659	6,912	7,412	10,237	93,654	98,008	121,159
Total	269,071	266,823	246,906	3,093	1,221	1,425	32,384	30,896	42,413	304,549	298,940	290,744

Value of U.S. Shrimp imports in 1,000 U.S. dollars (January to June)

	Frozen			Fresh			Prepared			Total		
Country	1998	1999	2000	1998	1999	2000	1998	1999	2000	1998	1999	2000
Mexico	138,631	62,496	56,457	123	296	271	93	120	71	138,847	62,912	567,800
Ecuador	342,756	261,280	110,188	7	-	-	1,059	175	2,098	343,822	261,455	112,286
Thailand	310,882	302,707	348,534	1,728	1,784	1,882	135,483	99,886	139,698	448,094	404,377	490,113
Indonesia	72,842	77,994	82,994	1,038	112	224	5,351	3,145	4,326	79,231	81,251	87,543
Philippines	8,990	9,501	10,073	10	8	3	255	319	296	9,255	9,827	10,373
China	13,562	13,924	33,096	427	1,390	2,226	948	501	520	14,937	15,815	35,842
Others	319,865	351,852	457,391	9,014	2,389	3,928	23,000	22,928	33,709	351,879	377,168	495,028
Total	1,207,528	1,079,753	1,098,733	12,347	5,980	8,534	166,188	127,072	180,719	1,386,064	1,212,806	1,287,986

Source: Bureau of the Census, U.S. Department of Commerce.