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Aquaculture Outlook

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Domestic Aquaculture Competing Worldwide

Approved by the World Agricultural Outlook Board.

Domestic seafood consumption in 2006 is likely to see a higher percentage of overall consumption from foreign sources, a trend that has been going on for some time. These imports stem in large part from foreign aquaculture production. Almost all foreign countries are in the same situation as the United States, with limited ways to increase their wild harvest fishing industry, so they are expanding their aquacultural production. The continued growth of the Atlantic salmon and tilapia industries provides good examples of how farm-raised product is being used in rapidly expanding parts of the U.S. seafood industry. In both these industries almost all the domestic production and all the foreign imports come from farmed production. The questions for the U.S. aquaculture industry are how best to compete with growing foreign production and how to determine which market segments are most favorable for domestic producers.

The current economic outlook for U.S. aquacultural producers for the remainder of 2006 and into 2007 is clouded by the wide swings in energy prices over the last several weeks. After rapidly increasing earlier in the year, energy prices are falling, but remain above year-earlier levels. The domestic economic forecast is for relatively steady growth in the real Gross Domestic Product through the remainder of 2006, and for slowed-but-steady growth in 2007. Real per capita disposable income is expected to be stronger in the second half of 2006 and to continue to grow at a relatively strong rate in 2007. Higher real disposable income, coupled with lower fuel prices, would have a positive impact on the restaurant and foodservice sector. This is critical to the aquaculture industry and the seafood industry overall, as they make a larger percentage of their sales through the restaurant and foodservice sector than the suppliers of traditional livestock and poultry products.

U.S. beef, pork, and poultry industries are all forecast to have increased production in 2006 and 2007. In the wholesale market, the major price series for beef and pork are forecast to be lower in 2006 and to fall again in 2007. For the domestic poultry industry, overall prices are expected to be lower in 2006 and to increase slightly in 2007. These forecasts of increasing production and lower prices for the major livestock and poultry protein sources mean strong competition for domestic and imported aquaculture products.

This is the last issue of *Aquaculture Outlook*. Following this report, all aquaculture material will be included, when timely information is available, in the monthly *Livestock, Dairy, and Poultry Outlook*. A monthly report will give readers a more current analysis of changing situations in the aquaculture industry. You can subscribe to *Livestock, Dairy, and Poultry Outlook* (which includes *Aquaculture Outlook*) at: http://usda.mannlib.cornell.edu/MannUsda/homepage.do.

In October 2 2006, the National Agricultural Statistics Service released the results of the 2005 Census of Aquaculture. This report will update the material contained in the 1998 Census of Aquaculture. The data in the report will cover production method, water source, sales, distribution and farm labor. The report covers food fish mollusks, crustaceans, ornamental fish baitfish, and sport fish. http://www.nass.usda.gov/census_of_agriculture/2002/aquacultue/index.asp.

Aquaculture Haiku

Strong fins beat the water
Silver sides flash in the bright sun
The farmer's net closes

Author David Harvey

Domestic

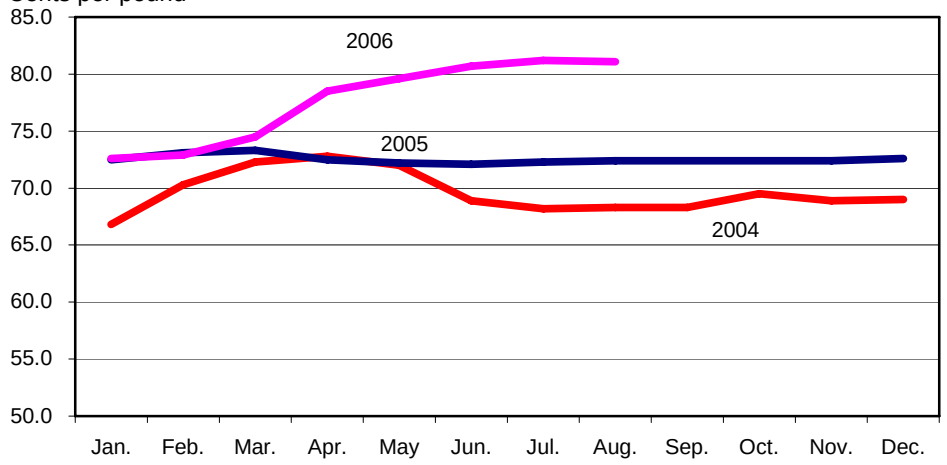
Catfish Sales Down, but Prices Rise

Catfish sales have declined for the third consecutive year, but have again been partially offset by higher prices. In 2006, sales by growers to processors are expected to total between 550 and 565 million pounds, down from 2005 by 6 to 8 percent. Sales over the first 8 months of 2006 have been 380 million pounds, down 7.8 percent from the same period in 2005. Catfish processor sales through August 2006 were also lower, at just under 200 million pounds, down 3 percent from the same period in 2005. Unlike in previous years, the lower sales at the processing level have resulted in a decrease in the inventory held by catfish processors. As of the end of August 2006, processor-held inventories were 11.1 million pounds, about 1.8 million pounds (14 percent) lower than a year earlier.

Figure 1

Catfish farm prices

Cents per pound

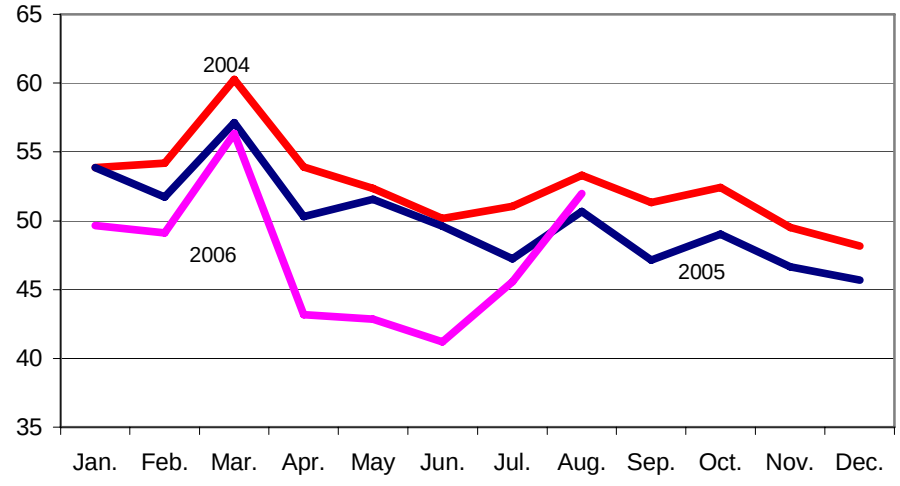


Source: *Catfish Processing Report,* NASS, USDA.

Figure 2

Catfish farm sales

Million pounds



Source: *Catfish Processing Report* , NASS, USDA.

Lower catfish supplies at the grower and processor levels and lower inventories in 2006 have placed upward pressure on prices. Over the first 8 months of 2006, farm prices averaged 77.6 cents per pound, up 5.4 cents from the same period in 2005 and 7.6 cents higher than in 2004. The increase came even though farm prices in 2004 and 2005 were up quite a bit from the depressed price levels in 2002 and 2003. Processor prices have also strengthened during the first 8 months of 2006, averaging $2.44 per pound, up 7 percent from a year earlier.

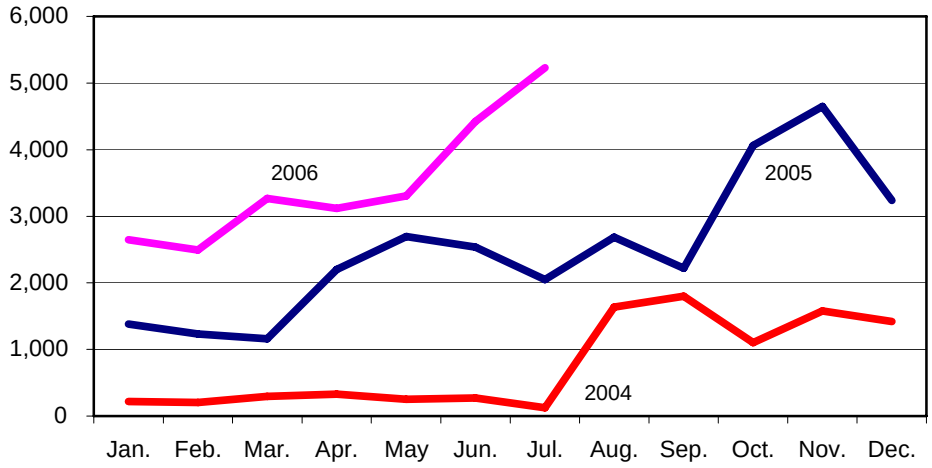
Heading into the fourth quarter of 2006, the catfish industry finds itself in a position similar to where it was last year. For catfish farmers, lower sales to processors than in the previous year has been mostly offset by higher farm prices as processors, reacting to the lower supply of fish, have bid up prices. At the beginning of July, catfish farmers' estimate of their inventory was about the same as for the previous year, except for stockers. As a result, supplies of fish for sale to processors during the end of the third quarter and in the fourth quarter of 2006 are not expected to significantly differ from the previous year.

Concerning costs, prices for soybeans are currently forecast to be slightly lower in the second half of 2006 than earlier in the year and overall prices in 2007 are expected to be slightly lower than in 2006. Corn prices in 2006 are forecast to be about the opposite, with prices gradually strengthening in the second half of 2006 and through 2007. However, any declines in feed costs that have occurred in 2006 have been overshadowed by the large increases in energy prices that growers and processors have experienced. The slight decline in catfish that growers estimate they will have for sale is expected to again put upward pressure on farm prices. Domestic catfish are expected to face strong competition from imports of catfish and similar products such as tilapia that are getting wider distribution in both foodservice and at-home markets.

Figure 3

Catfish Imports

Thousand pounds



Source: *Catfish Processing Report* , NASS, USDA.

After rising rapidly in 2005, catfish imports have again expanded strongly in 2006. Over the first 7 months of 2006, catfish imports (import data lags 1 month behind other catfish data) totaled 14.8 million pounds, up 71 percent from 2005 and 780 percent higher than during the same period in 2004. Imports are almost exclusively frozen fillets, mostly from Vietnam. With lower domestic supplies available, the increase in imports of frozen fillets has not had a depressing impact on frozen fillet prices. During the first 8 months of 2006, the average price for frozen fillets was $2.87 per pound, up 7 percent from the same period in 2005 and 9 percent higher than in 2004.

Catfish Inventories Mostly Unchanged

Even though farm-level catfish prices were strong for most of 2005 and have remained strong during the first half of 2006, most growers have not significantly changed their inventories. The Catfish Production report by the U.S. Department of Agriculture's National Agricultural Statistics Service (NASS) shows estimates of grower fish holdings as of July 1, 2006. Only growers in Mississippi, Alabama, Arkansas, and Louisiana are surveyed, but these States are responsible for the majority of catfish production. The only category with any significant change from the previous year was in stocker inventories.

Catfish growers estimated that, as of July 1, 2006, the total number of foodsize fish in inventory was 290.8 million, down slightly from a year earlier and down 26 million from 2004. The estimates for foodsize fish were lower for the large and small size categories, but up slightly for medium foodsize fish. The July 1 inventory estimates of foodsize fish provide a measure of the majority of fish available for marketing during the third and into the fourth quarters. The basically unchanged inventory level of foodsize fish means that farm and processor level sales during the third quarter of 2006 and into the fourth quarter can be assumed to be close to those of the previous year. The forecast for the third and fourth quarters

is for farm sales to be at about the same level as in 2005, for farm prices to remain high, and for processors to continue to have relatively tight inventories of processed catfish products.

The grower estimate of the number of stockers (all sizes) as of July 1, 2006 was 636.7 million, 10 percent higher than the previous year. The number of fingerlings held on farms was estimated at 1.45 billion, up slightly after rising sharply in 2005. Stockers and fingerlings make up the majority of fish that growers will have available for marketing during the end of fourth-quarter 2006 and into 2007. The actual availability of fish for processing will depend on mortality rates, disease outbreaks, off-flavor problems, and feeding rates.

Farm Prices Expected To Remain Strong Into 2007

In 2006, the farm price for catfish is expected to average between 75 and 77 cents per pound, up about 5 cents from the previous year and one of the highest nominal yearly average prices in recent years. Based on the July 1 estimates, which showed slightly lower foodsize fish and stocker fish inventories that were about the same as in 2003 and 2004, farm prices for late third- and fourth-quarter 2006 are expected to remain in the mid-to-upper 70 cents per pound range. Additional factors will influence catfish farm prices during this period. First, since the forecast during the first half of 2006, the forecast price for corn and soybeans has decreased considerably. This should allow feed costs to remain close to current levels. Second, processor inventories are down considerably from the previous year, increasing the need for additional catfish for processing. Third, catfish processors will benefit from the fact that overall prices of a number of seafood products, including some direct substitutes like tilapia, have been higher this year.

Acreage Expected To Fall Again in Second Half of 2006

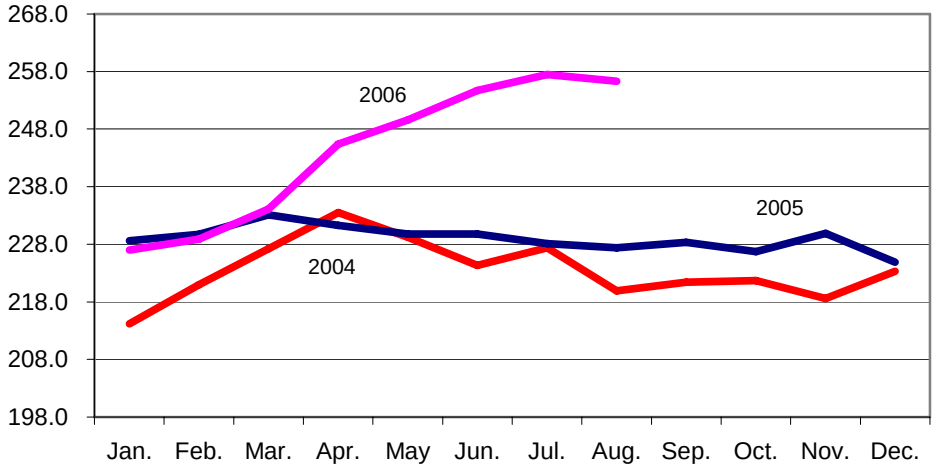
Farm prices have been higher in 2006, but for the fourth consecutive year catfish growers have reported plans to reduce acreage. In the July 2006 NASS Catfish Production report, growers reported expecting to have 124,200 acres of ponds in use for foodsize fish production between July 1 and December 31, 2006, down 2,800 acres or 2 percent from the previous year. Reported acreage use was down in Mississippi and Louisiana, but small increases were indicated by growers in Alabama and Arkansas. The total acreage to be used by growers was estimated at 151,460, with some increases expected in the pond acreage for fingerling and broodstock production. The pattern of acreage reduction may be reversed in 2007, as growers have now had 2 years of relatively strong prices.

Starting in January 2006, NASS began releasing monthly data on catfish feed deliveries on a State or regional basis. The data is reported as tons of feed delivered and is further divided into feed for foodsize fish and fingerlings and broodfish. Data from January 2004 was included. Over the first 8 months of 2006, feed deliveries for foodsize fish totaled 537,525 tons, up 4 percent from the same period in 2005. Feed deliveries for fingerlings and broodfish were also up sharply, totaling 35,228 tons, 27 percent higher than in the same period in 2005. The feed delivery data is available on a State basis for the 4 major catfish-producing States and for other growers either east or west of the Mississippi.

Figure 4

Catfish processor prices

Cents per pound



Source: *Catfish Processing Report* , NASS, USDA.

Processor Revenues Decline

Catfish processors sold 199 million pounds of product over the first 8 months of 2006, down 3 percent from the same period in 2005. For all of 2006, processor sales are forecast at between 290 and 296 million pounds, 2 to 3 percent lower than the previous year. Between January and August 2006, prices for catfish sold by processors averaged $2.44 per pound, 7 cents higher than the previous year. The lower sales were more than offset by the higher average prices, so that gross processor revenues from catfish sales over the first 8 months of 2006 were $485 million, 3.4 percent higher than the previous year. Processor revenues for calendar year 2006 are forecast to reach between $695 and $715 million.

International

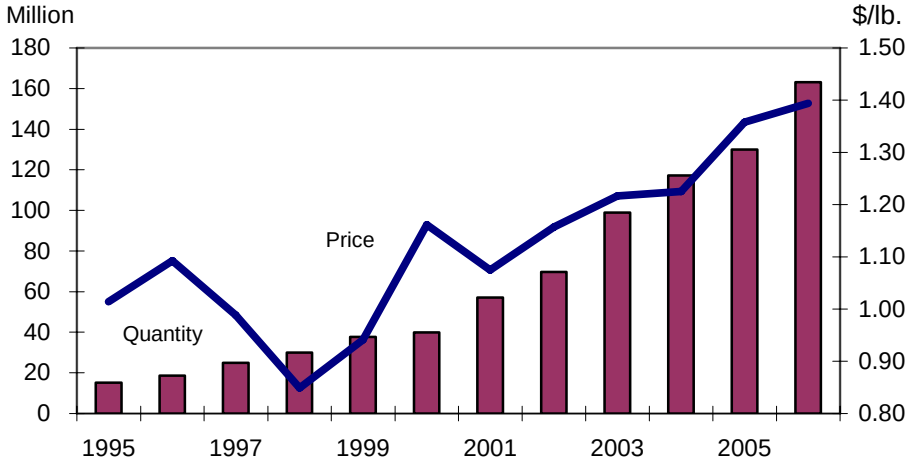
Tilapia Imports Up 26 Percent

U.S. tilapia imports totaled 163.1 million pounds during the first 6 months of 2005, up over 25 percent from the same period in 2005. This increase continues the pattern for tilapia imports since they were first separately reported in 1995. The average price for all tilapia imports in first-half 2006 increased by 3 cents to $1.39 per pound. The higher import quantity and average price in the first half of 2006 marks the fifth consecutive year that both the import quantity and the average price have increased. Between 2001 and 2006, the quantity of tilapia imports to the United States during the first half of the year has risen from 57 million pounds to 163.1 million. Over the same time period, the average price of all tilapia imports has gone from $1.07 to $1.39 per pound. The 163.1 million pounds of tilapia products imported in first-half 2006 represent approximately 360 to 370 million pounds on a live-weight basis.

With a large increase in imported frozen tilapia fillets, up 47 percent to 73.6 million pounds, imports of frozen filleted products were for the first time larger than imports of frozen whole fish. In 2006, all the growth in tilapia imports came from larger shipments in the frozen whole fish and frozen filleted products category, while the quantity of imported fresh filleted products was about the same as the previous year.

Figure 5

U.S. tilapia imports January to June



Source: Bureau of the Census, Dept. of Commerce.

Almost all of the increase in imports of frozen filleted tilapia products was due to larger shipments from China. In the first half of 2006 imports of frozen filleted products from China totaled 103.3 million pounds, up 66 percent from the previous year. Shipments from Indonesia also increased, but these imports only represent about 10 percent of total U.S. imports. While the average price of total tilapia imports has increased the last 2 years, the average price for frozen filleted products has actually declined slightly. In the first half of 2004, the average import price for frozen filleted tilapia products was $1.52 per pound. This increased by 1 cent in 2005, but in the first half of 2006, the average price for frozen filleted products had fallen to $1.50 per pound.

Most of the rapidly growing U.S. tilapia imports have entered the foodservice market, where the mild, white-fleshed fish with a steady or declining price has provided an easy way to add a seafood item to menus. Over the last several years, the growth pattern for tilapia imports has been similar to that of salmon and other seafood products, with high percentages of farm-raised production. The imports started out as a low cost "commodity" product, but then rapidly shifted to a value-added product, with supplying countries looking to gain market share through strong price competition. The shift from mostly whole fish to more fresh and frozen fillets is expected to continue in the future, as Asian tilapia producers are expected to strongly compete to be the low-cost supplier to a U.S. market geared to a frozen filleted product.

China and Taiwan continue to account for close to 100 percent of all shipments to the U.S. of frozen whole fish. After declining in 2005, imports of frozen whole tilapia rose by 18 percent in first-half 2006. However, the value of frozen whole tilapia imports rose 48 percent as the average unit price increased to 68 cents per pound. Most of the growth in future tilapia imports is expected to come from filleted products for the foodservice market.

Imports of fresh tilapia fillets totaled 25.5 million pounds in the first 6 months of 2006, about the same amount as in 2005. With the price increasing to $2.88 per pound, the total value of imported fresh tilapia fillets was $73.6 million, 5 percent more than in 2005. Most of fresh fillet imports come from Central and South America, with Honduras, Costa Rica, Panama, and Ecuador the major suppliers. Larger shipments from Honduras and Ecuador accounted for most of the increased shipments seen in the first half of 2006.

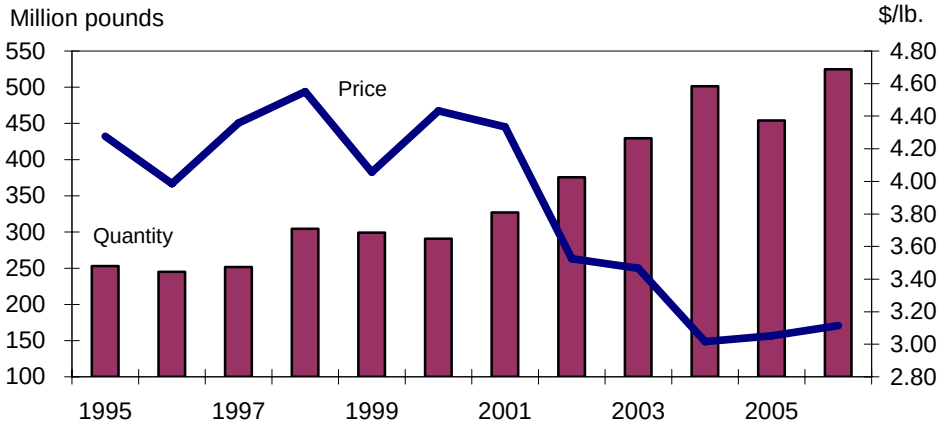
For calendar year 2006, tilapia imports are expected to total between 350 and 360 million pounds on a product-weight basis (about 780 to 800 million pounds on a live-weight basis). In the past, tilapia imports have shown a somewhat seasonal pattern, being stronger in the second half of the year. Overall, tilapia product prices are expected to remain close to their first-half 2006 average of around $1.38 to $1.42 per pound, so the total value of imports is expected to be in the $490 to $510 million range. With the continued growth of aquacultural production in Asian countries, especially China, imports of tilapia products are expected to grow in 2007 and become a mainstay in the U.S. foodservice and restaurant sectors.

Shrimp Imports Increase 16 Percent

U.S. shrimp imports in the first 6 months of 2006 totaled 525 million pounds and were valued at $1.6 billion, a 16-percent increase in quantity and an 18-percent increase in value. After declining in the first half of 2005, shrimp imports seem to be on the expansion track they exhibited in 2000 and 2004. While average prices for shrimp imports have risen in both 2005 and 2006, they remain considerably lower than in the late 1990s and the first few years of this century. Between 2000 and 2004, rapidly falling shrimp prices were a major factor in the expansion of shrimp imports. The average overall price for shrimp in the first half of 2006 was $3.11 per pound, up 6 cents per pound from the previous year.

The growth in shrimp imports during the first half of 2006 was divided between larger shipments of both frozen shrimp and prepared shrimp products. After declining sharply in 2005, shipments of frozen shrimp rose by 10 percent in the first half of 2006. However, even with this increase shipments in the first half of 2006 were below those of 2004. The majority of the increase came from larger shipments to the United States from Ecuador, Thailand, and Indonesia. These are the largest single-country suppliers of frozen shrimp to the United States, accounting for 58 percent of total shrimp imports in this category. The increased imports from these countries were partially offset by lower shipments from Brazil, India, and China. Although the decline in imports from China between 2005 and 2006 was relatively small, China's shipments in this category are only a fraction of what they were in 2004, when China was the second-largest supplier of frozen shrimp.

Figure 6
U.S. shrimp imports January to June



Source: Bureau of the Census, Dept. of Commerce.

Shipments of prepared shrimp products totaled 149.5 million pounds over the first 6 months of 2006, up 31 percent from a year earlier. Thailand and Indonesia were again two of the countries that supplied the largest increases. While China's shipments of frozen shrimp products have declined, its exports of prepared shrimp products have risen rapidly. In the first half of 2006, shipments of prepared shrimp products from China were 50.5 million pounds, up 20 million pounds from 2005 and 37 million pounds higher than in the first half of 2004. It appears that Chinese producers may have shifted the type of shrimp products sent to the United States due to the imposition of countervailing duties on frozen warm water shrimp products. Imports from Thailand, Indonesia, and China accounted for 84 percent of all the shrimp imported in the prepared shrimp category.

U.S. shrimp imports for 2006 are expected to reach between 1.2 and 1.3 billion pounds, with a value from $3.75 to $3.85 billion. These estimates assume shrimp imports will follow their normal seasonal pattern through the remainder of 2006. The quantity and value of shrimp imports over the second half of 2006 will be heavily influenced by the status of the U.S. economy. A strong economy will allow for more personal expenditures at foodservice markets and restaurants. The prices will also be influenced by the pace of economic growth in Japan and the EU, two other major markets for shrimp-exporting countries.

Atlantic Salmon Imports Rise 2 Percent

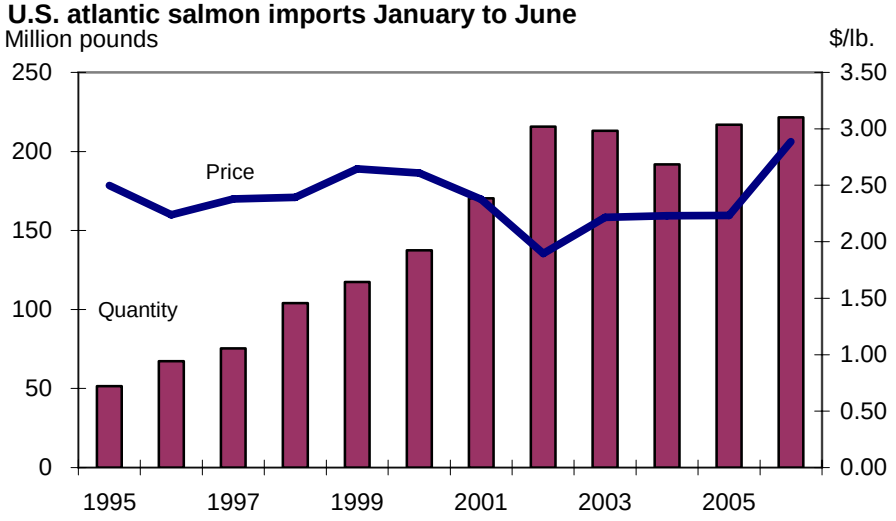
U.S. Atlantic salmon imports over the first half of 2006 totaled 221.6 million pounds, up 2.1 percent from the same period in 2005. This is the second consecutive year that Atlantic salmon imports have increased, and it sets a record level. The small increase in the quantity of imports, combined with a strong increase in the unit value to $2.89 per pound (up 66 cents per pound), pushed the value of Atlantic salmon imports to $639.7 million, up 31.9 percent from the same period in 2005.

U.S. Atlantic salmon imports over the first 6 months of 2006 were very different from the trend observed in the last several years. In the past, the trend has been increasing imports from Chile and a growing percentage of total Atlantic salmon imports in the form of filleted products. Over the first half of 2006, countries other than Chile fueled the gains in imports, and the quantity of imported filleted products declined. These changes are combined with a strong increase in unit price. Over the long term, overall unit values had been rising only modestly, fueled mainly by the growing percentage of higher valued filleted products. In 2006, import prices for both fresh whole salmon and filleted products were significantly higher.

The increase in overall quantity of Atlantic salmon imports was concentrated in the fresh whole fish market, specifically from Canada. In first-half 2006, shipments from Canada reached 79.6 million pounds, 26 percent higher than the previous year and 80 percent higher than in the first half of 2004. The United Kingdom is the only other major supplier of fresh whole Atlantic salmon, and while imports from the United Kingdom increased from the previous year, they were still below the imports in the first half of 2004. Imports of frozen whole fish were also higher, but they are a relatively small portion of the total market for imported Atlantic salmon.

Figure 7

U.S. atlantic salmon imports January to June



Source: Bureau of the Census, Dept. of Census.

Even with a strong increase in the quantity of imported fresh Atlantic salmon, unit values for fresh imports continued to strengthen. Prices rose from $2.09 per pound in the first half of 2005 to $2.36 per pound in the first half of 2006. The higher prices reflect strong demand in the three largest salmon markets (the United States, the EU, and Japan), along with a slowing of the rapid growth of farmed salmon production in the late 1990s and earlier this century. With the large jump in average unit value, fresh whole Atlantic salmon were being imported at a higher average unit price in the first half of 2006 than filleted products were only a year earlier.

While Canada dominates imports in the fresh whole fish market, Chile is by far the largest supplier of fresh and frozen fillets. Over the first 6 months of 2006, shipments of Atlantic salmon fillets from Chile totaled 110.7 million pounds, down 12 percent from the previous year and only slightly higher than in the first half of 2004. While the quantity of filleted imports was declining, the value of these imports was rising dramatically to almost $360 million, an increase of $85 million from the first half of 2005. The average unit price for filleted products rose to $3.26 per pound, 95 cents per pound higher than the previous year.

The strong price increase, along with an increase in the quantity of Atlantic salmon imports, indicates a strong demand for farmed salmon products in the United States. This demand was also aided by a stronger-than-expected U.S. economy over the first half of 2006. A major factor behind the growth of the farmed salmon industry was that it was for a number of years able to supply a growing quantity of fish at falling prices. The large jump in prices in the first half of 2006 may be only temporary if it results in another jump in worldwide farmed-salmon production.

Normally, U.S. Atlantic salmon imports are somewhat stronger in the second half of the year. Imports of Atlantic salmon products for all of 2006 are expected to total between 435 and 445 million pounds, about 4 percent higher than in 2005. The forecast is expected to move sharply higher, with a total for 2006 estimated at between $1.2 billion and $1.3 billion. Over the first half of 2006, the increases in

Atlantic salmon imports have chiefly been due to a larger amount of fresh fish from Canada. If prices remain at the levels seen in the first half of 2006, the expansion in imports may be somewhat slower in the second half of the year. However, the chief factor driving demand will be the overall health of the U.S. domestic economy, especially for a relatively high-priced food item like Atlantic salmon.

Changes in Mollusk Exports and Imports Mixed

Over the first 6 months of 2006, the value of U.S. exports of clams and mussels increased strongly while the value of oyster exports declined compared to the same period in 2005. The value of both exports and imports of scallops rose significantly. Over the past several years, imports of mollusk products have been trending upward as aquaculture production of these products has continued to grow.

The import value of these four mollusk species (Clams, mussels, oysters, and scallops) totaled $179 million during the first half of 2006, up 35 percent from the previous year. The unit prices for mollusks can vary widely, both between species and within a species, due to the wide range of shell-on products and shell-off processed products. Most mollusk products shipped to the United States come from relatively few countries, with Canada, New Zealand, China, and some other Asian countries being the major suppliers.

Mollusk exports are considerably smaller than imports. In the first half of 2006, U.S. exports of oysters, clams, mussels, and scallops were valued at $78 million, with scallops accounting for 85 percent of the total. Due to a strong market for mussels, most domestic production normally stays in the U.S. However, mussel exports were up strongly over the first 6 months of 2006 to 1.3 million pounds. Most of the increase was in exports to Canada, Hong Kong, and Japan. Domestic mussel production, almost all from wild harvest, is normally 4 to 5 million pounds, with Maine the largest producer.

After declining in 2005, the value of clam exports in the first 6 months of 2006 rose to $3.3 million, about even with exports in 2004. Oyster exports totaled $7.3 million, down considerably from 2005, but over the last several years the value of oyster exports had been rising, primarily due to falling domestic production.

Scallop exports rose to $65.8 million in the first half of 2006, an increase of 29 percent from the same period in 2005. These exports are divided into three main products – fresh, frozen, and prepared. The largest single-country market for U.S. scallops is Canada, but over the last several years growth in exports to EU countries has made the EU the largest combined market. In 2006, shipments to EU countries totaled $41.4 million, accounting for 63 percent of total exports. Exports to the EU over the last 2 years have been boosted by the strength of the euro against the dollar.

The value of imported mussel products totaled $34.2 million in the first half of 2006, down $941,000, after rising strongly in 2005. Mussel imports are reported in three categories, live farm-raised products, live non-farmed products, and processed products. In first-half 2006, Canada accounted for almost 100 percent of the value of all U.S. live farm-raised mussel imports ($9.4 million). Imports of live non-farmed mussels were relatively small in first-half 2006, only $1.3 million, and were

almost entirely from New Zealand. The value of processed mussel imports totaled $23.5 million, down 1 percent from the previous year, although the quantity of mussel imports in this category was up slightly. New Zealand is the dominant supplier, accounting for over 90 percent of processed mussel imports over the first 6 months of 2006. The mussels grown in Canada and New Zealand are different species, but they can be substituted for each other. New Zealand has concentrated on the processed product market due to the time it takes to ship products to the United States and the weight reduction that comes with exporting a shucked-mussel product.

The value of imported clam products in the first half of 2006 was $2.7 million, about the same as the previous year. Canada is again the largest supplier of clam products to the United States, followed by China. Clam imports comprise a number of different species, and the various clam products, raw or processed, can vary widely in price.

The value of imported oyster products in the first half of 2006 rose to $26 million, a 12-percent increase over the previous year, and the fourth increase in a row. Canada chiefly supplies fresh or frozen oyster products, while China and Korea are the main sources of prepared or smoked oyster products. Imports of oyster products are expected to keep increasing over the next several years due to shortages from hurricane damage in the major growing areas in the Gulf and from continued disease problems in the Chesapeake Bay.

Scallops are the highest valued mollusk import, totaling $116 million in the first half of 2006, up 62 percent from the same period in 2005. Canada, traditionally the largest supplier of scallops to the U.S. market, was surpassed this year by China. Imports from Canada totaled $26.2 million, down 4 percent from the previous year. While imports from Canada were declining, imports from China rose by 62 percent to $44.8 million. Over the last 2 years, the value of scallop shipments from China increased 226 percent. Imports from Japan totaled $24.8 million, a huge jump from the $4.6 million shipped in the first half of 2005. Although not identified in the trade data, much of the increase in scallop imports from China is assumed to come from expanding aquaculture production.

Exports of Ornamental Fish Decline, Imports Continue To Rise

Exports of ornamental fish in the first half of 2006 were valued at only $3.1 million, down 4 percent from the same period in 2005, but 39 percent lower than in the first 6 months of 2004. The decline in exports in 2006 is chiefly due to smaller shipments to Canada. This decline was partially offset by larger exports to both Hong Kong and Taiwan. Shipments were also lower to most European countries, even though the euro has been relatively strong compared with the U.S. dollar, a situation that normally would favor increased shipments to this market.

Over the first 6 months of 2006, the value of U.S. ornamental fish imports increased almost 10 percent to $26.3 million. The value of these imports has risen in 5 of the last 6 years, with the bulk of the imports continuing to be from Asian countries. The largest Western Hemisphere suppliers of ornamental fish to the U.S. market are Colombia and Peru, whose total shipments in first-half 2006 were valued at slightly less than $900,000, about $280,000 more than in the first 6 months of 2005.

While shipments from Asian countries were generally higher, the majority of the increase in ornamental fish imports came from strong upturns in shipments from Sri Lanka, Malaysia, Singapore, and Indonesia. Partially offsetting the growth in imports from these countries were somewhat lower shipments from the Philippines, Korea, and Hong Kong. Imports from Japan continued to expand in the first 6 months of 2006. With shipments totaling $1.5 million, imports from Japan have expanded by 98 percent since the first 6 months of 2000. Since the species of fish in the ornamental fish category are not identified, there is no reliable way to tell if a specific species or group of ornamental fish is most responsible for the increased value of imports.

Contacts and Links

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NASS Trout, http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1172

National Marine Fisheries Service, Fisheries of the United States (wild harvest data), http://www.st.nmfs.gov/st1/publications.html

Table 1--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 lbs.						
2000	50,552	50,942	56,856	48,781	48,424	48,011	49,023	53,204	49,422	51,412	45,535	41,441	593,603
2001	46,999	50,257	57,766	52,478	51,736	47,883	47,829	51,690	49,699	52,264	44,670	43,837	597,108
2002	52,551	52,856	58,340	50,694	52,902	49,450	52,363	54,383	53,366	56,576	50,072	47,048	630,601
2003	55,523	55,461	65,007	57,105	58,424	52,411	54,089	54,153	51,885	57,652	51,246	48,518	661,474
2004	53,849	54,173	60,272	53,896	52,324	50,155	51,055	53,295	51,329	52,396	49,536	48,170	630,450
2005	53,856	51,720	57,117	50,306	51,552	49,626	47,241	50,686	47,151	49,034	46,674	45,707	600,670
2006	49,666	49,145	56,315	43,185	42,865	41,214	45,582	51,990					
Average price paid by processors for farm-raised catfish							Cents per pound 1/						
2000	74.4	78.8	78.9	78.9	78.5	78.6	76.0	74.1	72.7	71.0	69.6	68.2	75.0
2001	69.3	69.6	69.7	69.4	68.7	66.9	65.6	62.4	61.0	59.6	56.6	55.4	64.5
2002	54.9	55.5	56.5	56.1	57.4	58.8	59.0	58.2	57.6	56.8	56.0	54.4	56.8
2003	52.9	54.4	58.5	63.0	61.8	58.6	56.4	55.2	56.0	56.7	61.0	62.9	58.1
2004	66.8	70.3	72.3	72.8	72.0	68.9	68.2	68.3	68.3	69.5	68.9	69.0	69.6
2005	72.5	73.1	73.3	72.5	72.2	68.9	72.3	72.4	72.4	72.4	72.4	72.6	72.3
2006	72.6	72.9	74.5	78.5	79.6	80.7	81.2	81.1					
Catfish sold by processors							1,000 lbs.						
2000	25,412	25,354	29,161	24,924	24,763	25,342	24,911	25,847	23,743	25,036	21,911	20,752	297,156
2001	24,507	25,968	28,752	25,167	24,728	23,690	24,816	26,004	24,210	25,083	21,807	21,635	296,367
2002	27,173	29,308	28,645	25,023	27,261	24,670	26,441	27,961	26,498	27,800	23,939	22,930	317,649
2003	27,584	27,586	30,485	26,135	27,370	25,487	26,427	27,627	26,853	27,875	23,416	22,482	319,327
2004	27,140	28,526	28,845	25,033	24,764	24,896	24,623	26,538	24,674	25,863	23,156	22,721	306,779
2005	26,204	26,526	27,473	24,536	25,764	25,154	23,729	25,336	24,649	25,904	22,868	21,825	299,968
2006	26,889	27,349	29,367	24,076	23,173	21,740	22,083	24,002					
Average price received by processors for all catfish							Cents per pound						
2000	235.2	240.4	244.8	244.6	244.5	237.7	238.7	239.6	237.1	232.7	232.4	227.1	237.9
2001	231.8	236.9	233.2	234.1	232.7	227.6	226.2	223.8	218.5	216.3	211.4	209.0	225.1
2002	208.4	210.3	206.6	208.2	209.0	209.4	207.2	205.9	207.4	205.2	203.8	202.5	207.0
2003	202.2	201.6	206.9	210.7	207.5	203.5	203.6	202.9	202.1	204.7	207.6	208.7	205.2
2004	214.4	221.2	227.5	233.2	229.3	223.9	227.1	220.2	221.2	221.5	219.1	223.0	223.5
2005	228.8	229.8	233.6	231.7	230.1	223.8	228.1	227.0	228.5	226.7	230.1	225.1	228.6
2006	227.0	228.7	234.1	245.7	249.3	254.8	257.5	256.1					

1/ Live weight.

Source: Monthly *Catfish Processing Report*, NASS, USDA.

Table 2--Catfish: Inventory numbers, in thousands, as of July 1 1/

State	Broodfish				Fingerling/fry				Stockers			
	2003	2004	2005	2006	2003	2004	2005	2006	2003	2004	2005	2006
Alabama	65	130	100	180	92,500	91,000	48,000	74,000	90,800	113,200	121,300	139,800
Arkansas	110	110	120	130	220,000	220,000	342,000	299,000	109,100	102,400	67,300	98,200
Louisiana	19	23	29	20	85,300	49,000	98,000	34,100	16,900	14,720	10,780	5,710
Mississippi	700	650	780	700	1,104,000	940,000	962,000	1,050,000	432,000	394,000	379,000	393,000
Total	894	913	1,029	1,030	1,501,800	1,300,000	1,450,000	1,457,100	648,800	624,320	578,380	636,710

State	Small foodsize				Medium foodsize				Large foodsize			
	2003	2004	2005	2006	2003	2004	2005	2006	2003	2004	2005	2006
Alabama	55,100	40,500	42,500	47,200	19,200	17,300	22,000	18,100	2,500	3,100	2,300	3,400
Arkansas	43,800	45,700	35,400	34,900	20,300	16,400	15,600	13,200	1,130	1,210	1,360	1,230
Louisiana	12,000	6,700	6,100	3,950	8,900	4,970	3,800	1,860	450	690	660	195
Mississippi	143,400	138,000	128,000	124,000	36,800	39,800	31,000	40,500	3,300	2,800	2,900	2,300
Total	254,300	230,900	212,000	210,050	85,200	78,470	72,400	73,660	7,380	7,800	7,220	7,125

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

Source: *Catfish Growers Survey* , NASS, USDA.

Table 3--Catfish: Supply, sales, prices, and inventory, August 2005 - August 2006

Item	2005 Aug.	Sept.	Oct.	Nov.	Dec.	2006 Jan.	Feb.	Mar.	Apr.	May	June	July	2006 Aug.
Supply	1,000 lbs.					1,000 lbs.							1,000 lbs.
Grower sales 1/	50,686	47,151	49,034	46,674	45,707	49,666	49,145	56,315	43,185	42,865	41,214	45,582	51,990
Processor sales	25,336	24,649	25,904	22,868	21,825	26,889	27,349	29,367	24,076	23,173	21,740	22,083	24,002
Fresh	8,799	8,619	8,739	7,871	7,893	9,481	9,464	11,328	9,004	8,363	7,717	7,858	8,037
Whole	2,673	2,687	2,546	2,615	2,784	3,195	3,331	4,024	2,940	2,795	2,464	2,716	2,711
Fillets	4,998	4,848	5,072	4,291	4,209	5,160	5,109	6,090	5,077	4,653	4,446	4,279	4,447
Other	1,128	1,084	1,121	965	900	1,126	1,024	1,214	987	915	807	863	879
Frozen	16,537	16,030	17,165	14,997	13,932	17,408	17,885	18,039	15,072	14,810	14,023	14,225	15,965
Whole	1,017	967	1,068	1,023	1,012	1,154	1,256	1,331	1,210	1,145	889	954	1,011
Fillets	10,491	10,438	10,917	9,759	8,940	11,238	11,418	11,619	9,993	9,563	9,127	9,471	10,142
Other	5,029	4,625	5,180	4,215	3,980	5,016	5,211	5,089	3,869	4,102	4,007	3,800	4,812
Processor inventory 2/	12,881	12,168	11,457	12,855	13,707	13,381	11,108	10,263	8,496	7,232	7,333	8,569	11,059
Fresh	736	707	897	873	551	1,022	836	696	603	721	798	931	1,046
Whole	169	139	192	211	90	226	209	212	152	126	127	173	248
Fillets	423	463	566	531	372	622	501	363	352	481	472	581	659
Other	144	105	139	131	89	174	126	121	99	114	199	177	139
Frozen	12,145	11,461	10,560	11,982	13,156	12,359	10,272	9,567	7,893	6,511	6,535	7,638	10,013
Whole	682	567	538	637	831	964	1,058	1,047	946	809	770	716	644
Fillets	8,323	8,070	7,674	8,597	9,342	8,452	6,838	5,881	4,330	3,239	3,070	3,849	5,785
Other	3,140	2,824	2,348	2,748	2,983	2,943	2,376	2,639	2,617	2,463	2,695	3,073	3,584
Prices	Dollars per pound					Dollars per pound						Dollars per pound	
Farm price 3/	0.72	0.72	0.72	0.72	0.73	0.73	0.73	0.75	0.79	0.80	0.81	0.81	0.81
Processor prices	2.27	2.28	2.27	2.30	2.25	2.27	2.29	2.34	2.46	2.49	2.55	2.58	2.56
Fresh	2.30	2.29	2.33	2.26	2.23	2.27	2.25	2.28	2.41	2.47	2.56	2.53	2.57
Whole	1.57	1.58	1.63	1.55	1.50	1.53	1.49	1.54	1.65	1.70	1.74	1.72	1.76
Fillets	2.83	2.83	2.84	2.84	2.84	2.86	2.87	2.89	2.98	3.08	3.14	3.18	3.20
Other	1.68	1.64	1.65	1.60	1.65	1.64	1.63	1.65	1.75	1.73	1.86	1.86	1.85
Frozen	2.25	2.28	2.23	2.32	2.26	2.27	2.31	2.38	2.48	2.51	2.54	2.60	2.56
Whole	1.99	2.01	2.00	2.03	2.01	2.00	2.01	2.03	2.14	2.15	2.19	2.24	2.17
Fillets	2.68	2.68	2.66	2.67	2.66	2.67	2.69	2.75	2.85	2.92	2.98	3.01	3.06
Other	1.42	1.44	1.38	1.59	1.43	1.44	1.54	1.63	1.65	1.64	1.62	1.67	1.58

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

Source: NASS, USDA.

Table 4--Value and quantity of U.S. exports and imports of selected seafood products, January to June

Commodity	2002	2003	2004	2005	2006	2002	2003	2004	2005	2006
Exports			$1,000					1,000 lb.		
Ornamental fish	4,348	4,369	5,152	3,275	3,128	NA	NA	NA	NA	NA
Trout, live	141	205	1,231	169	286	NA	NA	NA	NA	NA
Trout, fresh & frozen	982	4,017	1,000	692	879	744	2,042	574	414	414
Atlantic salmon, fresh	10,462	5,509	16,818	7,917	7,544	5,583	2,738	8,655	4,398	3,744
Pacific salmon, fresh 1/	9,459	7,005	12,604	9,154	4,296	6,103	4,936	8,185	5,711	2,436
Atlantic salmon, frozen	102	101	134	407	86	47	48	66	217	39
Pacific salmon, frozen 1/	26,512	29,069	31,682	31,159	29,153	21,985	22,884	21,369	21,874	21,052
Canned & pre. salmon 2/	57,937	51,384	66,077	72,322	78,708	41,244	35,761	46,357	46,425	53,389
Shrimp, frozen	29,913	29,712	21,361	15,736	14,254	7,891	9,366	6,844	4,713	3,809
Shrimp, fresh & pre. 3/	24,608	31,695	20,040	17,652	21,931	6,387	8,489	5,672	5,474	5,889
Oysters 4/	3,717	4,264	6,069	9,486	7,329	1,763	2,275	3,222	4,284	3,268
Mussels 5/	868	919	599	543	1,387	709	726	545	413	1,317
Clams 6/	2,792	4,248	3,312	2,972	3,264	1,709	2,030	2,175	1,841	1,850
Scallops	15,490	22,184	31,437	50,939	65,781	4,186	5,608	7,327	10,512	12,100
Imports			$1,000					1,000 lb.		
Ornamental fish	20,811	22,093	21,979	23,918	26,257	NA	NA	NA	NA	NA
Trout, live	52	132	76	286	478	NA	NA	NA	NA	NA
Trout, fresh & frozen	7,025	7,345	7,151	5,782	83,212	4,408	4,316	4,222	3,126	4,139
Atlantic salmon, fresh	360,246	362,381	345,772	400,288	515,518	186,435	183,176	157,691	182,760	181,724
Pacific salmon, fresh 1/	18,803	21,215	25,385	25,002	23,910	11,305	9,667	11,278	11,377	9,186
Atlantic salmon, frozen	49,083	69,963	81,999	84,598	124,214	29,320	29,834	34,148	34,245	39,848
Pacific salmon, frozen 1/	9,947	15,666	29,076	33,028	40,876	8,936	12,611	22,500	22,051	22,931
Canned & pre. salmon 2/	18,903	30,765	33,889	32,093	45,881	7,145	11,475	12,837	11,294	14,590
Shrimp, frozen	1,049,279	1,197,950	1,180,980	1,063,010	1,200,198	297,307	343,640	390,289	340,163	372,820
Shrimp, fresh & pre. 3/	276,238	292,461	328,459	326,118	434,471	78,927	84,519	109,382	115,181	151,988
Oysters 4/	14,697	18,621	20,676	23,127	25,957	7,394	9,692	10,469	11,008	12,005
Mussels 5/	31,107	26,013	30,903	35,173	34,232	26,189	24,170	28,202	27,727	27,419
Clams 6/	3,372	4,029	3,361	3,360	2,728	3,417	4,339	3,752	3,432	2,148
Scallops	67,453	67,640	74,200	71,700	115,807	24,126	23,786	26,289	22,575	31,700
Tilapia 7/	80,628	120,293	143,613	176,153	227,291	69,700	98,921	117,222	129,865	163,080

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.

Table 5--U.S. tilapia imports, volume by country, (January to June)

Country	Whole, frozen			Fillets, fresh			Fillets, frozen			Total		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
	1,000 Pounds											
Mexico	0	0	0	0	1	4	0	0	0	0	1	4
Honduras	0	0	0	4,411	6,648	7,976	0	0	0	4,411	6,648	7,976
Nicaragua	0	0	0	45	103	5	18	6	0	63	109	5
Costa Rica	16	20	0	4,777	5,130	2,544	6	175	0	4,799	5,326	2,544
Jamaica	0	0	0	2	27	282	9	0	0	12	27	282
Colombia	0	0	0	0	80	434	0	0	0	0	80	434
Ecuador	110	94	83	11,935	11,954	12,145	275	114	244	12,320	12,162	12,473
Thailand	131	199	50	0	0	0	828	1,430	309	959	1,629	359
Indonesia	6	0	633	0	22	0	4,347	6,697	7,505	4,353	6,718	8,138
China	35,104	24,981	41,616	0	0	0	28,259	37,250	61,663	63,363	62,232	103,279
Taiwan	22,752	28,722	20,246	0	0	0	2,837	3,667	3,410	25,589	32,389	23,656
Other	248	324	1,297	807	1,620	2,141	297	669	494	1,353	2,613	3,931
Total	58,368	54,341	63,925	21,978	25,586	25,530	36,876	50,008	73,625	117,222	129,934	163,080

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

Country	Whole, frozen			Fillets, fresh			Fillets, frozen			Total		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
	1,000 Dollars											
Mexico	0	0	0	0	3	11	0	0	0	0	3	11
Honduras	0	0	0	11,282	18,529	23,921	0	0	0	11,282	18,529	23,921
Nicaragua	0	0	0	116	270	15	38	10	0	154	280	15
Costa Rica	16	14	0	12,129	12,993	6,646	14	448	0	12,159	13,455	6,646
Jamaica	0	0	0	7	75	849	22	0	5	29	75	854
Colombia	0	0	0	0	220	1,336	0	0	0	0	220	1,336
Ecuador	112	145	118	33,830	34,380	35,374	679	265	547	34,620	34,790	36,039
Thailand	58	117	39	0	0	0	1,482	2,843	583	1,540	2,960	621
Indonesia	3	0	1,022	0	80	0	9,303	14,542	17,158	9,306	14,622	18,180
China	16,768	13,773	29,920	0	0	0	39,269	51,809	85,331	56,037	65,582	115,251
Taiwan	11,334	15,150	11,373	0	0	0	4,713	5,648	5,809	16,047	20,799	17,182
Other	127	313	1,067	1,782	3,869	5,420	529	934	747	2,439	5,116	7,234
Total	28,419	29,512	43,539	59,147	70,419	73,572	56,048	76,499	110,180	143,613	176,430	227,291

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

Table 6--U.S. Shrimp imports in pounds (January to June)

Country	Frozen			Fresh			Prepared			Total		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
					1,000 Pounds							
Mexico	11,952	13,025	15,574	1	13	12	163	92	109	12,117	13,130	15,695
Ecuador	45,230	55,511	70,177	30	33	82	1,733	2,557	1,470	46,992	58,101	71,729
Brazil	14,143	5,141	494	0	0	0	0	0	0	14,143	5,141	494
India	35,985	26,119	21,565	207	320	525	4,756	2,982	3,332	40,948	29,420	25,422
Bangladesh	10,268	11,380	16,069	0	0	0	180	260	306	10,448	11,640	16,375
Thailand	73,434	75,187	89,045	253	161	179	61,744	51,835	62,060	135,430	127,183	151,284
Vietnam	34,580	25,580	25,378	163	48	101	11,570	7,181	7,503	46,312	32,809	32,982
Indonesia	36,963	49,729	57,454	3	70	2	2,364	6,308	12,970	39,331	56,107	70,425
Philippines	900	1,276	1,768	1	9	0	273	413	432	1,174	1,699	2,200
China	46,703	6,147	5,482	247	447	776	16,924	30,584	50,450	63,875	37,177	56,707
Others	81,701	69,678	69,815	364	292	791	8,403	11,651	10,889	90,468	81,621	81,495
Total	391,859	338,772	372,820	1,270	1,393	2,466	108,110	113,864	149,522	501,239	454,029	524,808

Value of U.S. Shrimp imports (January to June)

Country	Frozen			Fresh			Prepared			Total		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
					1,000 Dollars							
Mexico	60,182	70,729	79,770	10	43	38	681	461	711	60,873	71,234	80,520
Ecuador	114,358	135,972	172,715	110	95	266	4,558	6,739	4,000	119,026	142,806	176,980
Brazil	27,513	9,239	921	0	0	0	0	0	0	27,513	9,239	921
India	141,783	109,833	89,848	2,037	3,195	5,196	9,611	6,899	7,001	153,431	119,927	102,044
Bangladesh	47,490	45,975	70,960	0	0	0	826	1,458	923	48,316	47,433	71,883
Thailand	189,156	200,644	242,910	1,575	1,024	1,394	183,120	156,533	194,469	373,851	358,200	438,773
Vietnam	170,734	124,971	144,311	304	180	172	54,002	33,955	35,889	225,040	159,106	180,372
Indonesia	115,524	160,307	184,160	4	208	5	7,818	20,994	43,521	123,347	181,510	227,685
Philippines	4,744	5,052	6,585	5	12	0	322	447	415	5,071	5,511	7,000
China	104,829	15,719	13,783	1,728	1,890	3,577	36,119	57,696	102,548	142,676	75,304	119,908
Others	207,486	181,130	194,237	1,936	1,707	3,702	23,661	32,690	30,644	233,083	215,528	228,583
Total	1,183,799	1,059,569	1,200,198	7,711	8,354	14,349	320,717	317,873	420,122	1,512,227	1,385,797	1,634,669

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

Table 7--U.S. Atlantic salmon imports, volume by country, (January to June)

Country	Fresh			Frozen			Fillets 1/			Total		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
	1,000 Pounds											
Canada	44,204	62,961	79,622	107	32	5	11,117	11,942	7,494	55,428	74,935	87,122
Chile	2,540	1,378	554	1,950	392	698	109,425	125,652	110,762	113,915	127,422	112,015
Iceland	1,131	163	751	0	0	0	402	232	175	1,533	395	926
Norway	315	231	200	1,670	1,287	1,655	4,767	2,647	6,964	6,751	4,166	8,819
Faroe Islands	866	1,039	99	42	76	0	0	0	0	908	1,114	99
United Kingdom	10,095	4,487	7,158	0	2	0	950	813	979	11,045	5,301	8,137
Other	124	157	309	453	483	1	1,685	3,069	4,145	2,262	3,709	4,455
Total	59,275	70,416	88,693	4,222	2,272	2,359	128,345	144,354	130,519	191,842	217,042	221,572

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

Country	Fresh			Frozen			Fillets 1/			Total		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
	1,000 Dollars											
Canada	95,107	130,626	185,881	223	39	13	38,191	39,671	25,355	133,520	170,336	211,250
Chile	4,678	2,463	1,349	3,665	672	1,356	239,268	275,695	359,685	247,611	278,829	362,390
Iceland	1,578	293	1,445	0	0	0	1,022	690	431	2,600	983	1,876
Norway	573	618	642	3,323	2,906	4,009	14,022	9,324	27,432	17,917	12,848	32,083
Faroe Islands	1,290	1,739	208	79	134	0	0	0	0	1,369	1,874	208
United Kingdom	17,990	10,512	18,298	0	3	0	3,197	2,957	4,264	21,187	13,472	22,562
Other	400	575	1,096	1,050	957	3	2,117	5,084	8,265	3,567	6,616	9,364
Total	121,616	146,825	208,917	8,339	4,711	5,382	297,816	333,421	425,433	427,772	484,957	639,732

1/ Includes both fresh and frozen fillets.

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