

Aquaculture Outlook

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Aquaculture Production Driving Many Seafood Markets

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The domestic production of various aquaculture products and the increasing importance of farm-raised fish, shellfish, and mollusk imports point towards aquaculture production being the driving force in terms of production and pricing for a growing number of seafood markets in the coming years. Examples of this are the tremendous consumption growth seen in such diverse markets as tilapia and mussels. Tilapia supplies, be they from domestic sources or imported products, are made up almost entirely of farmed production. The growing consumption of mussels in the United States has also been satisfied primarily from increased production of farm-raised products.

As most aquaculture industries have expanded, among the problems they face are over-production and declining real prices for their products. For most wild-harvest fishing industries, expansion would likely lead to problems with overfishing, essentially a reduction of their resource base, and higher product prices. Although faced with numerous obstacles, the ability of aquaculture industries to increase the efficiency of operations while avoiding the problem of overfishing means that aquacultural production is the most viable option to meet rising worldwide demand for many species.

Gulf Hurricanes

The long term impacts of Hurricanes Katrina and Rita on the coastal areas of Louisiana, Texas, Mississippi, and Alabama are not currently known. What is clear is that coastal wetlands and the infrastructure of the Gulf fishing industry (boats, docks, housing, and processing and handling facilities) have been severely damaged. In some cases it will take years for fishing industries to begin to approach their former productivity.

Inland, there is expected to be damage to crawfish ponds, alligator and catfish farms, and other aquaculture facilities. Louisiana is the largest seafood producing State outside of Alaska, and the Gulf Coast region accounts for a large percentage of total U.S. production of shrimp, oysters, and other species. The hurricane damage is expected to depress U.S. seafood harvests and further increase incentives to purchase a larger percentage of the total U.S. seafood supply from foreign sources.

Fuel Price Rise Expected To Accelerate Trade Trends

Higher worldwide fuel prices are expected to induce many producers to move away from raw product production and accelerate the movement to value-added production. With higher fuel prices raising transportation rates, both domestic and foreign producers are expected to search for ways to process their products to increase average values and lower overall weights. If this trend is noted, especially for imported products, it may lead domestic producers to direct their marketing efforts toward the fresh or whole product markets. An example is in the mollusk industry where foreign producers may look to ship more shucked products to reduce the overall weight transported and domestic producers who then may have additional opportunities in the shell-on market segment.

The current economic outlook for the United States for the remainder of 2005 and into 2006 has been clouded by the massive property and infrastructure damage along the Gulf Coast and what it will cost to rebuild those areas. Currently, the economic forecast is for relatively steady growth in gross domestic product through 2006, and after a dip in the fourth quarter of 2005, stronger growth in real per capita disposable income is forecast in 2006. Any reduction in per capita disposable income along with higher fuel prices would have a depressing effect on the foodservice sector, a critical one for the seafood industry. For producers utilizing grains in feeds, corn and soybean prices are expected to dip lower in the fourth quarter of 2005 and remain relatively stable through the first half of 2006.

Currently, beef and poultry consumption are expected to increase in 2005 and 2006, with pork consumption lower in 2005 and then steady in 2006. Retail beef prices are expected to decrease slightly towards the end of 2005 and average lower in 2006. For the poultry industry, overall prices are expected to be relatively steady in the second half of 2005 and into 2006.

Aquaculture Outlook will be issued twice a year in 2006--the same schedule as in 2005. In addition, starting in 2006, aquaculture material will be included, when timely information is available, in the monthly *Livestock, Dairy, and Poultry Outlook*. The ability to utilize a monthly report allows for a more timely analysis of changing situations in the aquaculture industry. You can subscribe to *Livestock, Dairy, and Poultry Outlook* (and *Aquaculture Outlook*) at: <http://usda.mannlib.cornell.edu/usda/>

Domestic Outlook

Catfish Sales Down, but Prices Rise

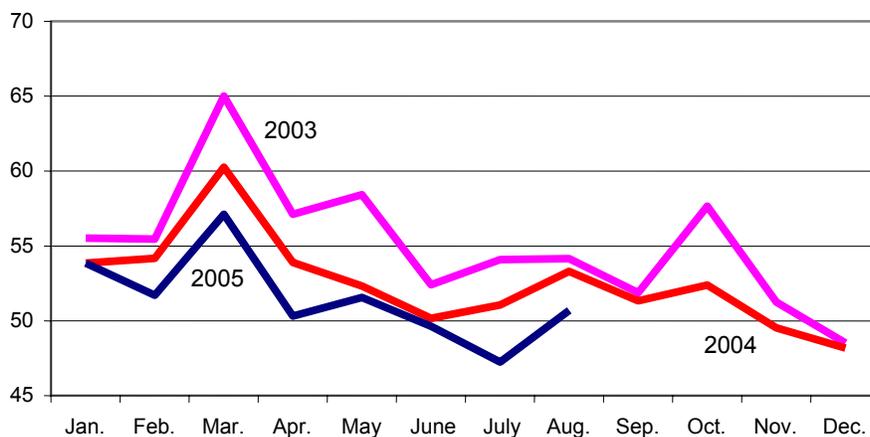
Catfish sales have gone down for the second consecutive year, but have been somewhat offset by higher prices. In 2005, sales by growers to processors are expected to total between 605 and 620 million pounds, down between 2 and 4 percent from 2004. Sales over the first 8 months of 2005 have been 412 million pounds, down 3.9 percent from the same period in 2004. Catfish processor sales through August 2005 have also been lower, totaling 205 million pounds, down 2.4 percent from the same period in 2004. Even though sales to and by catfish processors have been lower, the inventory of processed products continues to build. As of the end of August 2005, processor held inventories were 12.9 million pounds, about 1.1 million pounds higher than a year earlier.

Lower supplies of catfish at the grower and processor levels so far in 2005 have boosted prices. Over the first 8 months of 2005, farm prices have averaged 72 cents per pound, up 2 cents from the same period in 2004, even after a steep increase the previous year. Average processor prices have also risen over the same period, averaging \$2.29 per pound, up 2 percent from 2004.

Heading into the last quarter of 2005, the catfish industry finds itself in much the same position it was last year. Grower sales to processors are lower, but farm prices have increased in response to the smaller supplies. The number of fish growers estimated they had on their farms as of July 1, 2005, showed lower levels in most categories. This is a continuation of the decline in grower inventories seen over the last several years. As a result, a smaller number of fish are expected to be available for processing during the remainder of 2005 and into 2006.

Catfish farm sales

Million pounds



Source: National Agricultural Statistics Service, USDA.

On the cost side, prices for corn and soybeans are expected to be slightly lower in the second half of 2005 and through the first half of 2006. The steady or slightly lower feed cost is expected to be overshadowed by the large increases in energy prices which growers have already seen and are expected to continue to face for the foreseeable future. The slightly smaller quantities of catfish that growers are expected to have available for sales are expected to again place upward pressure on farm prices. However, domestic catfish are expected to have strong competition from imports of catfish and relatively similar products such as tilapia that are getting wider distribution in both the foodservice and the at-home markets.

So far in 2005, catfish imports have soared, increasing 588 percent over the same period in 2004. Over the first 7 months of 2005, catfish imports (import data lag one month behind other catfish data) totaled 13.3 million pounds, compared with only 1.7 million in 2004. Catfish imports had been falling the 3 years prior to 2005. Imports are almost exclusively frozen fillets from Vietnam. Because the higher imports have come when domestic supplies are relatively tight, they have not apparently had a major impact on processor prices for frozen fillets. During the first 8 months of 2005, the average processor price for frozen fillets was \$2.66 per pound, up 2 percent from the same period in 2004 and 9 percent higher than in 2003.

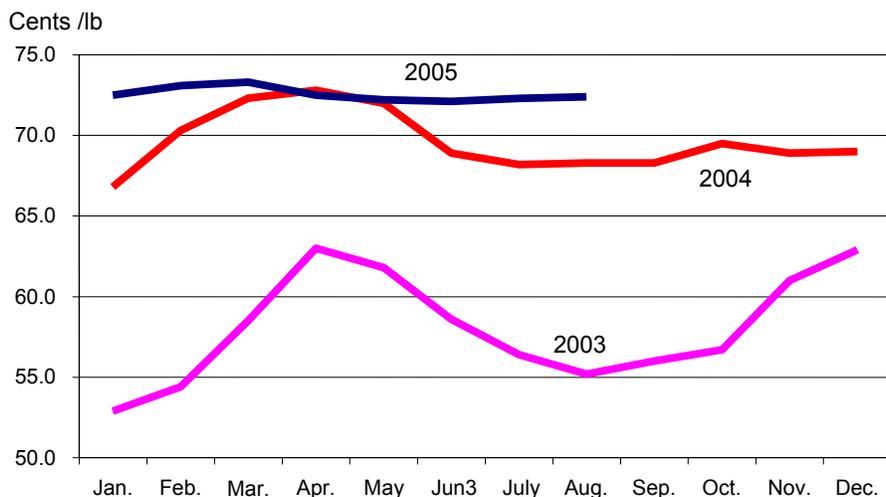
Catfish Inventories Down in Most Categories

Although farm prices were stronger in 2004 and have remained at relatively strong levels over the first 8 months of 2005, growers have reported smaller inventories in almost all categories. 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, 2005. Only growers in Mississippi, Alabama, Arkansas, and Louisiana are surveyed, but these States have the large majority of catfish production. A smaller number of fish in inventory for all categories except broodfish and fingerlings were reported.

Catfish growers estimated that, as of July 1, 2005, the total number of foodsize fish in inventory was 292 million, down 25 million from a year earlier, and almost 50 million from 2003. The estimates for foodsize fish were lower for the large, medium, and small size categories. The July 1 inventory estimates of foodsize fish are a measure of the majority of fish available for marketing during the third and into the fourth quarters. The reduced inventory of foodsize fish means that, during the third quarter of 2005 and into the fourth quarter, catfish farmers are likely to have a smaller supply of fish available to sell to processing plants. The forecast is for slightly higher farm prices for the remainder of 2005, with a lower volume of farm sales and a gradual decline in processor inventories.

The grower estimate for the number of stockers as of July 1, 2005, was 578 million, 7 percent lower than the previous year, and the number of fingerlings held on farms was estimated at 1.45 billion, up about 150 million after falling sharply in 2004. Stockers and fingerlings make up the majority of fish that growers will have available for marketing during the fourth quarter of 2005 and into 2006. The actual amount of fish available for processing will be a function of mortality rates, disease outbreaks, off-flavor problems, and feeding rates.

Catfish farm prices



Source: National Agricultural Statistics Service, USDA.

Farm Prices Expected To Remain Strong

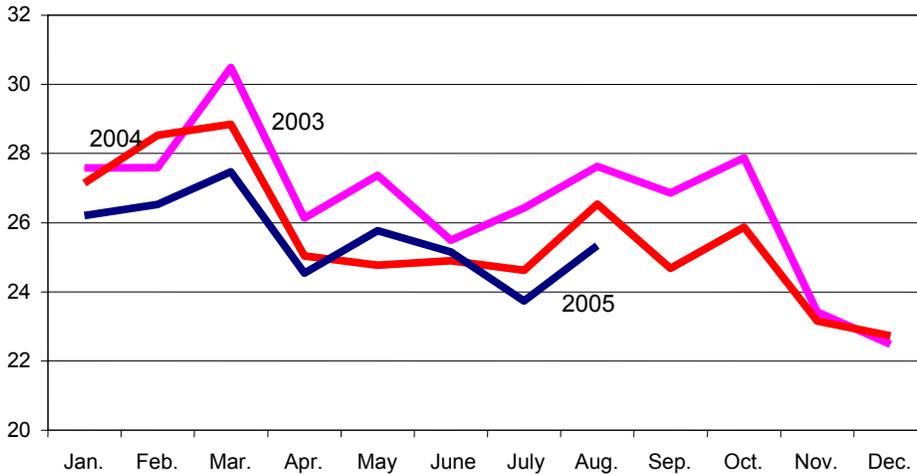
In 2005, the farm price for catfish is expected to average between 69 and 72 cents per pound, up slightly from 2004, but much stronger than in 2003. Based on the lower July 1 estimates of available market size and stocker fish at the beginning of the second half of 2005, farm prices for late third- and fourth-quarter 2005 are expected to remain in the high 60 to low 70 cents per pound range. There are a number of factors that will influence catfish farm prices over this period. First, growers' sales to processors are expected to remain at or slightly below year-earlier levels. Second, sales by processors will have to strengthen, thereby lowering inventories of processed products. Third, catfish import growth will have to slow from that seen during the first 7 months of 2005. While domestic prices for frozen fillets are currently above year-earlier levels, continuing large imports will eventually have a depressing effect on them. Fourth, catfish processors may benefit slightly from reduced seafood harvesting by the Gulf Coast fishing industry if the reduction significantly reduces overall seafood supply.

Acreage Expected To Fall Again in Second Half of 2005

Farm prices have been higher in 2005, but catfish growers for the third consecutive year have reported plans to reduce acreage. In the July 2005 NASS *Catfish Production* report, growers stated that they expected to have 127,500 acres of ponds in use for foodsize fish production between July 1 and December 31, 2005, down 13,700 acres or 10 percent from the previous year. The indicated acreage use was down in all four of the States included in the survey, with reductions in Arkansas and Mississippi accounting for most of the decline. The total acreage expected to be used by catfish growers was estimated at 154,025, with some increases expected in the pond acreage being used for fingerling and broodstock production. This pattern of acreage reduction may be reversed in the next survey as growers indicated they expect to be renovating and constructing more pond acreage in the second half of 2005 than they had in the second half of 2004.

Catfish processor sales

Million pounds



Source: National Agricultural Statistics Service, USDA.

Processor Revenues Higher

Catfish processors sold 204.7 million pounds of product over the first 8 months of 2005, 3 percent less than during the same period a year earlier. This included a 10-percent decrease in sales of fresh products and a 2-percent increase in sales of frozen products. For all of 2005, processor sales are forecast at between 295 and 300 million pounds, 2 to 4 percent lower than the previous year. Between January and August 2005, prices for catfish sold by processors averaged \$2.29 per pound, over 4 cents per pound above the previous year. However, lower sales more than offset the higher average prices.

Gross processor revenues from catfish sales over the first 8 months of 2005 were down about \$3 million from the same period in 2004 to \$469 million. Processor revenues for calendar year 2005 are expected to total between \$670 and \$680 million.

International Outlook

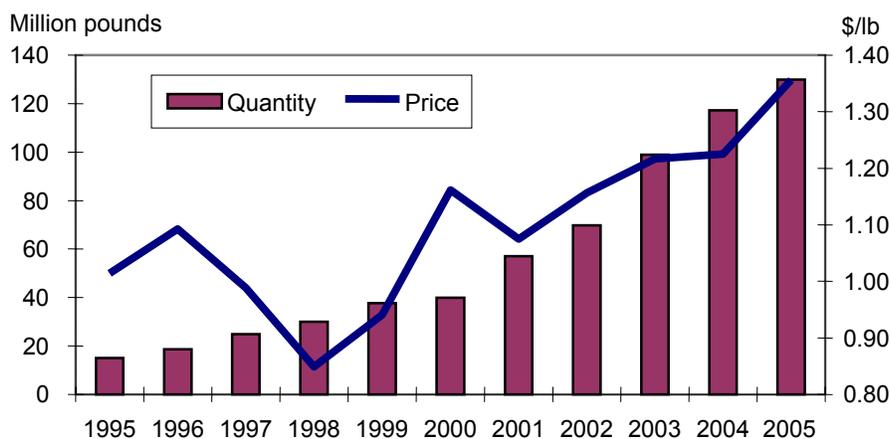
Tilapia Imports Up 11 Percent

U.S. tilapia imports totaled 129.9 million pounds during the first 6 months of 2005, up 11 percent from the same period in 2004. This increase continues the pattern seen for tilapia imports since they were first separately reported in 1995. Between 2000 and 2005, the quantity of tilapia imports to the United States during the first half of the year has increased by 226 percent. The 129.9 million pounds of tilapia products imported in first-half 2005 represent approximately 290 million pounds on a liveweight basis.

While whole fish still are the largest category of tilapia imports, fresh and frozen fillets have accounted for all of the import growth over the past year, as imports of whole fish fell. Frozen whole tilapia imports totaled 54.4 million pounds over the first half of 2005, 42 percent of total tilapia imports, but 7 percent lower than the previous year. Imports of fresh fillets increased 16 percent to 25.6 million pounds, and frozen fillet imports were 35 percent higher at 49.9 million pounds.

Most of the rapidly growing U.S. tilapia imports have primarily entered the foodservice market where the mild white-fleshed fish with a steady or declining price have 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. Imports start out as a low cost “commodity” product, but then rapidly shift to a value-added product, with supplying countries looking to gain market share through strong price competition. The overall nominal unit price of tilapia has not changed much over the last several years, primarily due to two shifts. The first is that fillets, especially frozen fillets, have become a larger part of total tilapia imports. The second shift has been that the unit price for frozen fillets has been declining on a

U.S. tilapia imports, January to June



Source: Bureau of Census, U.S. Dept. of Commerce.

nominal basis. The shift from whole fish to fresh and frozen fillets is expected to continue with a high degree of competition, especially among Asian producers vying to become the low cost supplier to that portion of the U.S. foodservice industry geared to utilizing a frozen filleted product.

China and Taiwan continue to account for close to 100 percent of all shipments of whole fish. After rising for several years, imports of frozen whole tilapia fell by 7 percent in first-half 2005. However, the value of whole tilapia imports rose as the average unit price increased to 54 cents per pound. Imports of frozen whole tilapia are not expected to expand much in the future as even specialized seafood restaurants are likely to concentrate on using fillets.

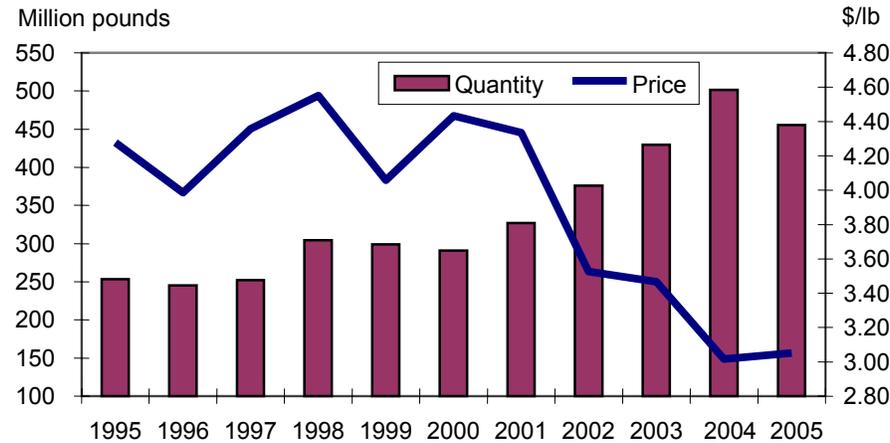
Imports of fresh tilapia fillets totaled 25.6 million pounds in the first 6 months of 2005, up from the same period in 2004 by 16 percent. With the price growing slightly to \$2.75 per pound, the total value of imported fresh tilapia fillets was \$70.4 million, 19 percent more than in 2004. Since 2000, shipments of fresh fillets have risen by 228 percent, with most of the growth coming from higher shipments from Central and South America. Fresh tilapia fillets basically enter the United States from three countries: Honduras, Costa Rica, and Ecuador. Imports from both Honduras and Costa Rica expanded strongly during the first half of 2005, but Ecuador continues to be the largest supplier--shipments in the first half of 2005 totaled 12 million pounds, up slightly from the same period in 2004. In the first half of 2005, Ecuador, Costa Rica, and Honduras combined to ship 23 million pounds of fresh tilapia fillets to the United States, 89 percent of the total.

Frozen fillet imports in the first half of 2005 totaled 49.9 million pounds, up 35 percent from the same period the previous year and up almost 900 percent from 2000. Most frozen fillets are supplied by Asian producers. In the first half of 2005, shipments from China totaled 37 million pounds, 75 percent of the total. There is also a large difference in the average import price of products coming from China as opposed to other countries. The average import price of frozen tilapia fillets from China was less than \$1.40 per pound, well below that of product from Costa Rica at \$2.50 per pound or even product from Indonesia, which averaged \$2.17 per pound. This wide difference in prices can be explained by a number of factors, including fillet size, the coloration of the tilapia being produced by the various countries, or some other quality factor.

Overall, the unit value of tilapia imports averaged \$1.36 per pound in the first half of 2005, up 13 cents from the previous year. Most of the change in the average import value is related to the rising percentage of fresh and frozen filleted products relative to total imports. The value of all tilapia imports rose to \$176 million.

For calendar year 2005, tilapia imports are expected to total between 280 and 295 million pounds on a product-weight basis, (about 625 to 650 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 2005 average of around \$1.30 to \$1.40 per pound, so the total value of imports is expected to be in the \$360 to \$410 million range. Imports are expected to expand in 2006 as tilapia continues to gain acceptance in the foodservice sector and additional consumers become aware of the species. The growth of filleted products as a share of imports is also expected to continue.

U.S. shrimp imports, January to June



Source: Bureau of Census, U.S. Dept. of Commerce.

Shrimp Imports Fall 9 Percent

U.S. shrimp imports in the first 6 months of 2005 totaled 455 million pounds and were valued at \$1.4 billion, a 9-percent decrease in quantity and an 8-percent decrease in value. Imports had risen for four consecutive years, from 290 million pounds in the first half of 2000 to over 500 million pounds in the first half of 2004. Much of the growth in shrimp imports over the last several years has been the result of falling prices for most shrimp products. The average overall price for shrimp in the first half of 2005 was \$3.05 per pound, only slightly higher than the previous year. However, shrimp prices have been falling for several years, so the average price in 2005 is much smaller, for example, the first half of 2000 when the average price was \$4.43 per pound.

Shrimp imports during the first half of 2005 were heavily influenced by the application of countervailing duties on imports of frozen warm water shrimp from a number of the major shrimp suppliers to the United States: Ecuador, Brazil, India, Thailand, Vietnam, and China. The duties were assessed on a company by company basis so there is no way to place an average duty on a country basis. However, of the six countries, only imports from Ecuador were higher in the first half of 2005 than a year earlier. Some of these declines were offset by higher shipments from some of the countries not affected by the countervailing duties. The changes in shrimp imports from the major countries over the last 3 years can be seen in table 6 of this report.

A major change was much lower shipments from China. Overall imports from China in the first half of 2005 fell to 37.4 million pounds, down 41 percent from the same period in 2004. The decline would have been even larger except there was a shift in the type of shrimp product being imported from China. Imports of frozen shrimp fell from 46.7 million pounds in the first half of 2004 to only 6.5 million pounds in the first half of 2005. This decline was partially offset by a large increase in shrimp shipments in the prepared shrimp categories. In the first half of 2004, shrimp shipments from China in the prepared shrimp categories totaled 16.9 million

pounds. However due to the countervailing duties placed on most frozen shrimp imports in the first half of 2005, shipments of prepared shrimp products from China in the first half of 2005 jumped to 30.6 million pounds.

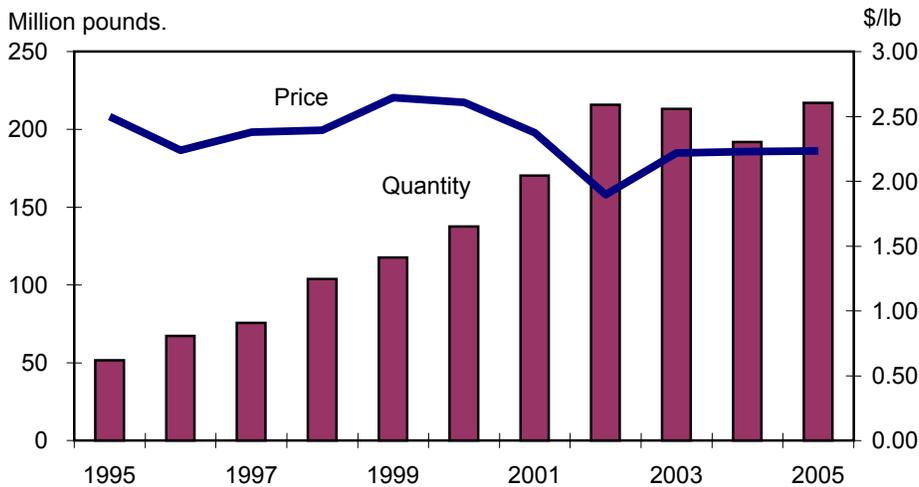
U.S. shrimp imports for all of 2005 are expected to reach between 1 and 1.1 billion pounds with a value of between \$3.1 and \$3.2 billion. These estimates are based on shrimp imports following their normal seasonal pattern through the remainder of 2005. However, the damage that has occurred to the Gulf shrimp industry may lead to an accelerated pace of shrimp imports in the second half of 2005. An increase in the demand for imports would be expected to put some upward pressure on prices, but any potential increase in imports may be tempered by a possible slowing in the domestic economy caused by higher energy costs and the costs of the Gulf Coast rebuilding efforts.

Atlantic Salmon Imports Jump by 13 Percent

After falling in the previous 2 years, U.S. imports of Atlantic salmon over the first half of 2005 rebounded to 217 million pounds, up 13 percent from the same period in 2004. While this level is a large increase from the previous year, it is about equal to imports in 2002 and 2003. The average overall price for Atlantic salmon imports remained basically the same, pushing the overall value of imports up by 13 percent to \$485 million.

The weakness of the dollar against the euro has made the European market a better prospect for European salmon producers, and U.S. imports from most European countries declined as their average prices rose significantly. With the decline in shipments from Europe, suppliers in Canada and Chile were able to expand exports to the United States and gain even more market share. Imports from Canada and Chile account for about 90 percent of all Atlantic salmon imports.

Atlantic salmon imports, January to June



Source: Bureau of Census, U.S. Dept. of Commerce.

The increase in overall Atlantic salmon imports was divided between gains in fresh product and fresh and frozen fillets. The market is also becoming more fragmented with different countries becoming the dominant supplier in a specific market niche. Canada is the dominant supplier to the United States in the fresh market, accounting for almost 90 percent of imports in this market segment. Shipments from Canada in the first half of 2005 totaled 63 million pounds, a 42-percent increase from the previous year. Even with such a large increase, this is less than Canada shipped in the first half of 2002. Over the last 2 years there has been a wide swing in the average prices for fresh imports from some of the major suppliers. The average price for fresh Atlantic salmon from Canada has gone from \$2.26 per pound in the first half of 2003 to \$2.07 per pound in the first half of 2005. The United Kingdom saw their shipments to the United States fall by 63 percent over the last 2 years as their average price rose from \$1.50 to \$2.34 per pound and the European Union (EU-25) countries became a more profitable market.

While Canada is the dominant shipper in the fresh market, Chile is by far the largest supplier of fresh and frozen fillets. Over the first 6 months of 2005, shipments of Atlantic salmon fillets from Chile totaled 126 million pounds, 15 percent higher than the previous year. Chile continues to be the price leader for filleted products by a wide margin. In the first half of 2005 the average price for Chilean imports was only \$2.19 per pound, over a dollar per pound less than imports from most other suppliers. Canadian imports also increased but they only account for about 8 percent of the total.

As in the fresh market, prices for European salmon, fresh and frozen filleted products, rose and their shipments to the United States fell. Shipments of fillets did not increase as much as fresh products this year, but the long term trend is for a growing percentage of total Atlantic salmon imports to be filleted products for a variety of reasons.

A strong increase in imports with no overall change in the average price shows that there is still considerable demand for farmed salmon products in the U.S. foodservice and at-home markets. This demand has been maintained in spite of some adverse publicity for salmon farming operations and strong advertising by the wild-harvest salmon industry. The long term success of the farmed salmon industry may depend on increasing consumption in the at-home market to avoid any possible downturn in consumption through higher end restaurants.

Atlantic salmon imports are seasonally higher in the second half of the year. Imports of Atlantic salmon products for all of 2005 are expected to be between 475 and 485 million pounds, with a value between \$950 million and \$1.1 billion. Over the first half of 2005, the increases in Atlantic salmon imports have chiefly been provided by the lowest price suppliers in the respective market segments. If prices remain steady, the growth in imports is expected to be somewhat less in the second half of 2005. However, the overall health of the U.S. domestic economy will play a major role in any change.

Mollusk Exports and Imports Mixed

Over the first 6 months of 2005, the value of U.S. exports of clams and mussels declined compared with the same period in 2004, and the value of imports were

generally higher. For scallops the value of imports fell and the value of exports rose. Over the past several years, imports of mollusk products have generally been increasing, especially from China, Canada, and New Zealand, countries that have had strong growth in their aquaculture industries.

Imports of these four mollusk species totaled almost \$154 million during the first half of 2005, up about 5 percent from the previous year. Discerning patterns in the imports is difficult due to the number of products involved and the price differences between shell-on product and shell-off processed products. In most cases, the majority of imports are being sourced from a relatively small number of countries, with Canada being the overall largest supplier.

The value of imported mussel products totaled \$35.2 million in the first half of 2005, up 14 percent from a year earlier. The growth in value was due to a price increase as the imports volume fell slightly to 27.7 million pounds. Almost all mussel imports are farm-raised in either Canada or New Zealand. Mussel imports have been generally rising over the last several years as improvements in growing techniques such as growing them on ropes suspended from floats have been adopted. This technique tends to yield a product with a higher meat weight to overall weight ratio and less sand or other particles in the shell.

The value of imported clam products in the first half of 2005 was \$3.4 million, about the same as the previous year. Canada is again the largest supplier to the United States, accounting for over 50 percent of the total value of imports. The remainder of the imports came from a number of Asian countries, with China the second largest supplier. The price of imported clam products can vary widely with specialty products such as geoduck clams having an average import price of over \$15 per pound.

The value of imported oyster products in the first half of 2005 rose to \$23 million, a 12-percent increase over the previous year as average prices rose by 7 percent. Canada, China, and Korea are the main suppliers. Canada chiefly supplies fresh or frozen oyster products, while China and Korea are the chief sources of prepared or smoked oyster products. Imports of oyster products are likely to continue to expand due to the damage done to the Gulf coastline by hurricanes Katrina and Rita. Louisiana is the largest oyster producing State in the United States, with much smaller production areas in other parts of the Gulf, the Northeast, and the Northwest.

Scallops are the highest valued mollusk import, totaling \$72 million in the first half of 2005. This value is down 3 percent from the previous year as imports from Japan and Canada both declined. Partially offsetting this decline was a large jump in imports from China (\$28 million), up over 100 percent from the first half of 2004. Most of the growth in imports from China has come from farm-raised scallop products and are expected to continue to increase due to the growth in their overall aquaculture industry and their ability to produce low-cost prepared products aimed at the seafood restaurant industry.

Mollusk exports are considerably smaller than imports. In the first half of 2005, U.S. exports of oysters, clams, mussels, and scallops were valued at about \$63 million and scallops accounted for over three-quarters of that. With a strong demand for mussels in the U.S. market, almost all the domestic production (about

40 million pounds) is sold domestically. Less than a million dollars of mussel products were exported in the first half of 2005. The value of mussel and clam exports was down compared with the previous year and with little or no increases in domestic production, exports of these products are not expected to expand in the near future. Any expansion in domestic supply is likely to be consumed in the domestic market.

Scallop exports rose to \$50 million in the first half of 2005, an increase of almost 60 percent from the same period in 2004. These exports are divided into three main products—fresh, frozen, and prepared products. The largest single market for frozen and prepared products is the EU-25. Exports to the EU-25 over the last year or so have been boosted by the appreciation of the euro against the dollar. The currency situation is expected to provide a strong incentive for exporting scallop products through the remainder of 2005 and into 2006.

Imports for Ornamental Fish Rise, but Exports Decline

Over the first 6 months of 2005, the value of ornamental fish imports increased 4 percent to \$23.9 million. The value of U.S. ornamental fish imports has risen in 4 of the last 5 years, and almost all of the ornamental fish imports are products of Asian countries. The largest Western Hemisphere supplier of ornamental fish to the U.S. market is Colombia, but their shipments in the first half of 2005 were valued only at \$620,000. Shipments from the Philippines were the only ones from a major supplier to show any strong growth from the previous year, rising by 30 percent to \$2.2 million. However, imports from Thailand, China, and Japan were also higher. Over the last several years, imports from Japan have grown quite steadily, expanding by 76 percent from 2000 to 2005. Japan is a major supplier of highly valued koi, and greater shipments of these types of fish may be one source of the increased value of its shipments. One of the major problems with identifying trends in ornamental fish imports is that all the different species are placed in one trade code, thus there is no reliable way to tell if imports of a specific species or group of ornamental fish are growing or declining in popularity based on the trade statistics.

Exports in the first half of 2005 were valued at only \$3.4 million, down 35 percent from the same period in 2004, due mostly to smaller shipments to Hong Kong and Taiwan. The value of ornamental fish shipped to these countries has varied widely over the last several years, but first-half 2005 shipments were especially small. In the first half of 2004, total shipments to Hong Kong and Taiwan were valued at over \$900,000 while in the same period in 2005 the value was only about \$125,000. Canada is the only “major” market for U.S. ornamental fish exports and accounted for about two-thirds of all shipments in the first half of 2005.

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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 lb						
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	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					
Average price paid by processors for farm-raised catfish							Cents per pound 1/						
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	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					
Catfish sold by processors							1,000 lb						
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	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					
Average price received by processors for all catfish							Cents per pound						
1999	225.6	226.2	231.8	236.2	239.5	239.9	239.7	234.6	236.9	235.9	235.6	230.9	234.4
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	228.7	229.7	233.4	231.5	229.9	223.8	228.1	227.0					

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				
	2002	2003	2004	2005	2002	2003	2004	2005	2002	2003	2004	2005
Alabama	135	65	130	100	121,700	92,500	91,000	48,000	153,900	90,800	113,200	121,300
Arkansas	140	110	110	120	297,000	220,000	220,000	342,000	128,400	109,100	102,400	67,300
Louisiana	27	19	23	29	94,300	85,300	49,000	98,000	45,000	16,900	14,720	10,780
Mississippi	750	700	650	780	1,123,000	1,104,000	940,000	962,000	439,600	432,000	394,000	379,000
Total	1,052	894	913	1,029	1,636,000	1,501,800	1,300,000	1,450,000	766,900	648,800	624,320	578,380

State	Small foodsize				Medium foodsize			Large foodsize				
	2002	2003	2004	2005	2002	2003	2004	2005	2002	2003	2004	2005
Alabama	45,700	55,100	40,500	42,500	23,300	19,200	17,300	22,000	3,900	2,500	3,100	2,300
Arkansas	41,800	43,800	45,700	35,400	24,800	20,300	16,400	15,600	3,100	1,130	1,210	1,360
Louisiana	8,400	12,000	6,700	6,100	4,900	8,900	4,970	3,800	520	450	690	660
Mississippi	185,100	143,400	138,000	128,000	41,400	36,800	39,800	31,000	2,700	3,300	2,800	2,900
Total	281,000	254,300	230,900	212,000	94,400	85,200	78,470	72,400	10,220	7,380	7,800	7,220

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

Item	2004					2005							2005
	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
Supply													
----1,000 lb----													
Grower sales 1/	53,295	51,329	52,396	49,536	48,170	53,856	51,720	57,117	50,306	51,552	49,626	47,241	50,686
Processor sales	26,538	24,674	25,863	23,156	22,721	26,204	26,526	27,473	24,536	25,764	25,154	23,729	25,336
Fresh	9,658	8,954	9,331	8,438	7,961	9,685	10,087	10,567	9,188	9,157	8,882	8,497	8,799
Whole	3,002	2,861	3,076	2,950	2,704	3,111	3,177	3,402	2,938	2,679	2,765	2,686	2,673
Fillets	5,483	4,865	4,992	4,336	4,162	5,274	5,615	5,795	4,979	5,274	4,987	4,714	4,998
Other	1,173	1,228	1,263	1,152	1,095	1,300	1,295	1,370	1,271	1,204	1,130	1,097	1,128
Frozen	16,880	15,720	16,532	14,718	14,760	16,519	16,439	16,906	15,348	16,607	16,272	15,232	16,537
Whole	1,164	935	1,128	1,010	979	1,116	1,117	1,166	1,141	1,091	1,008	1,021	1,017
Fillets	10,352	10,191	10,717	9,300	9,545	10,618	10,469	10,824	10,424	10,926	10,314	9,563	10,491
Other	5,364	4,594	4,687	4,408	4,236	4,785	4,853	4,916	3,783	4,590	4,950	4,648	5,029
Processor inventory 2/	11,657	12,661	12,769	14,221	15,172	14,642	13,272	13,982	12,984	12,946	12,608	12,867	12,881
Fresh	798	941	750	702	575	858	819	902	573	822	784	745	736
Whole	146	168	151	127	120	209	169	183	110	188	175	146	169
Fillets	530	624	490	473	357	512	520	585	368	510	495	482	423
Other	122	149	109	102	98	137	130	134	95	124	114	117	144
Frozen	10,859	11,720	12,019	13,519	14,597	13,784	12,453	13,080	12,411	12,124	11,824	12,122	12,145
Whole	806	704	577	553	685	724	800	1,213	1,110	725	736	739	682
Fillets	7,319	8,496	9,239	10,533	11,243	10,368	8,911	8,654	8,139	7,867	7,784	8,019	8,323
Other	2,734	2,520	2,203	2,433	2,669	2,692	2,742	3,213	3,162	3,532	3,304	3,364	3,140
Prices													
----Dollars per pound----													
Farm price 3/	0.68	0.68	0.70	0.69	0.69	0.73	0.73	0.73	0.73	0.72	0.72	0.72	0.72
Processor prices	2.20	2.21	2.22	2.19	2.23	2.29	2.30	2.33	2.31	2.30	2.29	2.28	2.27
Fresh	2.25	2.22	2.23	2.18	2.22	2.28	2.26	2.30	2.30	2.35	2.32	2.30	2.30
Whole	1.58	1.56	1.59	1.51	1.57	1.63	1.63	1.60	1.59	1.59	1.58	1.58	1.57
Fillets	2.73	2.74	2.76	2.77	2.77	2.81	2.75	2.85	2.87	2.86	2.85	2.84	2.83
Other	1.76	1.69	1.72	1.70	1.71	1.67	1.67	1.74	1.71	1.77	1.78	1.72	1.68
Frozen	2.17	2.21	2.20	2.19	2.24	2.29	2.32	2.35	2.32	2.27	2.27	2.27	2.25
Whole	1.97	1.94	1.88	1.93	1.96	1.97	2.01	1.98	2.01	2.02	2.01	2.00	1.99
Fillets	2.63	2.61	2.60	2.60	2.62	2.66	2.66	2.70	2.66	2.64	2.68	2.70	2.68
Other	1.33	1.37	1.38	1.40	1.44	1.55	1.66	1.68	1.49	1.46	1.46	1.45	1.42

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

Source: NASS, USDA.

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

Commodity	2001	2002	2003	2004	2005	2001	2002	2003	2004	2005
Exports			\$1,000					1,000 lb.		
Ornamental fish	3,681	4,348	4,369	5,152	3,356	0	0	0	0	0
Trout, live	219	141	205	1,231	169	0	0	0	0	0
Trout, fresh & frozen	917	982	4,017	1,000	692	662	744	2,042	574	414
Atlantic salmon, fresh	19,954	10,462	5,509	16,818	7,917	9,388	5,583	2,738	8,655	4,398
Pacific salmon, fresh 1/	6,280	9,459	7,005	12,604	8,933	4,173	6,103	4,936	8,185	5,581
Atlantic salmon, frozen	47	102	101	134	407	26	47	48	66	217
Pacific salmon, frozen 1/	34,852	26,512	29,069	31,682	31,159	26,843	21,985	22,884	21,369	21,874
Canned & pre. salmon 2/	62,294	57,937	51,384	66,077	72,444	38,015	41,244	35,761	46,357	48,855
Shrimp, frozen	33,194	29,913	29,712	21,361	15,728	8,512	7,891	9,366	6,844	4,707
Shrimp, fresh & pre. 3/	30,591	24,608	31,695	20,040	17,514	7,562	6,387	8,489	5,672	5,454
Oysters 4/	3,576	3,717	4,264	6,069	9,765	1,868	1,763	2,275	3,222	4,246
Mussels 5/	898	868	919	599	559	830	709	726	545	422
Clams 6/	3,289	2,792	4,248	3,312	2,964	2,014	1,709	2,030	2,175	1,858
Imports			\$1,000					1,000 lb.		
Ornamental fish	21,648	20,811	22,093	21,979	23,918	0	0	0	0	0
Trout, live	9	52	132	76	286	0	0	0	0	0
Trout, fresh & frozen	5,992	7,025	7,345	7,151	5,782	3,702	4,408	4,316	4,222	3,126
Atlantic salmon, fresh	366,803	360,246	362,381	345,772	400,288	154,470	186,435	183,176	157,691	182,760
Pacific salmon, fresh 1/	16,424	18,803	21,215	25,385	25,002	7,825	11,305	9,667	11,278	11,377
Atlantic salmon, frozen	37,428	49,083	69,963	81,999	84,598	15,766	29,320	29,834	34,148	34,245
Pacific salmon, frozen 1/	7,530	9,947	15,666	29,076	33,028	4,585	8,936	12,611	22,500	22,051
Canned & pre. salmon 2/	16,731	18,903	30,765	33,889	32,093	5,245	7,145	11,475	12,837	11,294
Shrimp, frozen	1,176,838	1,049,279	1,197,950	1,180,980	1,063,010	270,193	297,307	343,640	390,289	340,163
Shrimp, fresh & pre. 3/	252,516	276,238	292,461	328,459	326,118	57,090	78,927	84,519	109,382	115,181
Oysters 4/	16,126	14,697	18,621	20,676	23,127	7,760	7,394	9,692	10,469	11,008
Mussels 5/	24,318	31,107	26,013	30,903	35,173	21,420	26,189	24,170	28,202	27,727
Clams 6/	3,653	3,372	4,029	3,361	3,360	3,510	3,417	4,339	3,752	3,432
Tilapia 7/	61,304	80,628	120,293	143,613	176,153	57,043	69,700	98,921	117,222	129,865

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		
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005
1,000 pounds												
Mexico	0	0	0	0	0	0	0	0	0	0	0	0
Honduras	0	0	0	2,940	4,411	6,648	0	0	0	2,940	4,411	6,648
Nicaragua	0	0	0	0	45	103	13	18	6	13	63	109
Costa Rica	0	16	20	4,596	4,777	5,130	5	6	175	4,602	4,799	5,326
Jamaica	0	0	0	0	2	27	23	9	0	23	12	27
Colombia	0	0	0	0	0	80	0	0	0	0	0	80
Ecuador	199	110	64	10,421	11,935	11,954	198	275	114	10,818	12,320	12,132
Thailand	88	131	199	0	0	0	1,278	828	1,430	1,365	959	1,629
Indonesia	0	6	0	0	0	22	3,883	4,347	6,697	3,883	4,353	6,718
China	33,963	35,104	25,025	635	0	0	15,557	28,259	37,167	50,155	63,363	62,193
Taiwan	21,070	22,752	28,722	306	0	0	2,468	2,837	3,667	23,843	25,589	32,389
Other	410	248	324	594	807	1,621	261	297	669	1,264	1,353	2,614
Total	55,729	58,368	54,354	19,492	21,978	25,586	23,684	36,876	49,925	98,906	117,222	129,865

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

Country	Whole, frozen			Fillets, fresh			Fillets, frozen			Total		
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005
1,000 dollars												
Mexico	0	0	0	0	0	3	0	0	0	0	0	3
Honduras	0	0	0	7,988	11,282	18,529	0	0	0	7,988	11,282	18,529
Nicaragua	0	0	0	0	116	270	20	38	10	20	154	280
Costa Rica	0	16	14	11,843	12,129	12,993	14	14	448	11,857	12,159	13,455
Jamaica	0	0	0	0	7	75	46	22	0	46	29	75
Colombia	0	0	0	0	0	220	0	0	0	0	0	220
Ecuador	187	112	87	27,622	33,830	34,380	428	679	265	28,237	34,620	34,732
Thailand	51	58	117	0	0	0	2,265	1,482	2,843	2,316	1,540	2,960
Indonesia	0	3	0	0	0	80	8,832	9,303	14,542	8,832	9,306	14,622
China	16,793	16,768	13,785	949	0	0	24,267	39,269	51,576	42,009	56,037	65,362
Taiwan	11,760	11,334	15,150	595	0	0	4,777	4,713	5,648	17,133	16,047	20,799
Other	210	127	313	1,383	1,782	3,869	275	529	934	1,868	2,439	5,116
Total	29,001	28,419	29,467	50,380	59,147	70,419	40,925	56,048	76,267	120,306	143,613	176,153

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		
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mexico	10,725,189	11,952,281	13,054,837	37,359	1,453	13,426	92,419	163,151	91,755	10,854,968	12,116,885	13,160,018
Ecuador	43,687,948	45,229,620	54,697,405	2,802	29,599	32,846	943,485	1,732,705	2,557,420	44,634,235	46,991,924	57,287,671
Brazil	30,380,819	14,143,311	5,140,814	1,014	0	0	0	0	0	30,381,833	14,143,311	5,140,814
India	38,346,191	35,985,190	26,232,033	402,379	207,276	319,689	3,645,943	4,755,604	2,981,887	42,394,513	40,948,071	29,533,609
Bangladesh	4,696,314	10,267,999	11,418,457	0	0	0	0	180,453	259,695	4,696,314	10,448,453	11,678,152
Thailand	59,658,079	73,434,236	76,125,471	143,001	252,619	161,020	49,946,459	61,743,622	51,842,340	109,747,539	135,430,476	128,128,830
Vietnam	38,119,814	34,579,753	25,716,864	126,868	163,026	14,341	9,680,081	11,569,578	7,213,306	47,926,763	46,312,356	32,944,511
Indonesia	22,210,324	36,963,258	49,673,979	39,198	3,481	69,751	1,577,237	2,363,918	6,308,384	23,826,759	39,330,657	56,052,114
Philippines	1,089,183	899,841	1,276,455	1,228	1,204	9,083	260,623	273,234	413,429	1,351,034	1,174,278	1,698,966
China	27,968,978	46,703,113	6,496,249	370,999	247,241	305,033	10,507,229	16,924,450	30,605,159	38,847,206	63,874,804	37,406,440
Others	68,300,792	81,700,717	70,330,852	449,908	364,101	291,578	6,290,524	8,403,452	11,690,804	75,041,224	90,468,270	82,313,234
Total	345,183,629	391,859,319	340,163,413	1,574,757	1,270,000	1,216,767	82,944,001	108,110,167	113,964,178	429,702,387	501,239,485	455,344,358

Value of U.S. shrimp imports, January to June

Country	Frozen			Fresh			Prepared			Total		
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005
Mexico	68,829,821	60,182,223	70,956,155	96,640	9,885	43,411	503,897	681,176	461,482	69,430,358	60,873,284	71,461,048
Ecuador	126,103,233	114,358,334	134,337,049	10,739	110,122	94,710	2,621,895	4,557,538	6,739,251	128,735,867	119,025,994	141,171,010
Brazil	62,204,003	27,512,777	9,188,679	2,162	0	0	0	0	0	62,206,165	27,512,777	9,188,679
India	161,422,035	141,783,389	110,173,173	4,189,561	2,037,197	3,194,626	8,451,815	9,610,769	6,899,333	174,063,411	153,431,355	120,267,132
Bangladesh	23,581,945	47,489,951	46,083,561	0	0	0	0	825,776	1,458,478	23,581,945	48,315,727	47,542,039
Thailand	218,335,902	189,155,885	202,872,056	1,003,739	1,575,084	1,023,866	173,729,095	183,120,172	156,550,946	393,068,736	373,851,141	360,446,868
Vietnam	187,284,638	170,733,806	125,252,815	285,508	304,247	25,961	48,150,110	54,001,747	34,122,435	235,720,256	225,039,800	159,401,211
Indonesia	84,841,143	115,523,972	160,028,968	214,764	4,405	208,221	4,992,763	7,818,294	20,994,061	90,048,670	123,346,671	181,231,250
Philippines	5,470,643	4,743,764	5,051,745	5,572	5,457	12,398	291,196	322,277	446,756	5,767,411	5,071,498	5,510,899
China	67,897,819	104,829,047	15,386,817	3,188,646	1,728,336	1,628,888	25,908,701	36,118,627	57,736,353	96,995,166	142,676,010	74,752,058
Others	190,978,421	207,486,250	183,678,962	1,788,128	1,935,960	1,707,063	17,025,780	23,660,586	32,769,366	209,792,329	233,082,796	218,155,391
Total	1,196,949,603	1,183,799,398	1,063,009,980	10,785,459	7,710,693	7,939,144	281,675,252	320,716,962	318,178,461	1,489,410,314	1,512,227,053	1,389,127,585

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		
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005
1,000 pounds												
Canada	57,946	44,204	62,964	123	107	32	19,391	11,117	11,943	77,460	55,428	74,939
Chile	2,744	2,540	1,380	2,017	1,950	392	107,070	109,425	125,596	111,830	113,915	127,368
Iceland	730	1,131	163	45	0	0	160	402	232	935	1,533	395
Norway	641	315	234	2,373	1,670	1,287	5,185	4,767	2,645	8,199	6,751	4,166
Faroe Islands	280	866	1,039	6	42	76	2	0	0	288	908	1,114
United Kingdom	12,103	10,095	4,491	0	0	2	738	950	820	12,841	11,045	5,313
Other	842	124	157	0	453	483	645	1,685	3,071	1,487	2,262	3,710
Total	75,285	59,275	70,428	4,565	4,222	2,272	133,190	128,345	144,306	213,040	191,842	217,006

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

Country	Fresh			Frozen			Fillets 1/			Total		
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005
1,000 Dollars												
Canada	131,068	95,107	130,630	215	223	39	60,490	38,191	39,674	191,773	133,520	170,343
Chile	4,320	4,678	2,465	3,630	3,665	672	227,893	239,268	275,566	235,843	247,611	278,703
Iceland	986	1,578	293	294	0	0	508	1,022	690	1,788	2,600	983
Norway	1,084	573	626	4,369	3,323	2,906	14,955	14,022	9,316	20,408	17,917	12,848
Faroe Islands	380	1,290	1,739	15	79	134	6	0	0	402	1,369	1,874
United Kingdom	18,115	17,990	10,522	0	0	3	1,869	3,197	2,984	19,984	21,187	13,509
Other	1,343	400	575	0	1,050	957	766	2,117	5,094	2,109	3,567	6,626
Total	157,295	121,616	146,851	8,523	8,339	4,711	306,487	297,816	333,324	472,306	427,772	484,886

1/ Includes both fresh and frozen fillets.

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