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# Aquaculture Outlook

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## Domestic Seafood Consumption and Supply Move Toward Imports

### Contents

#### Domestic Outlook

Catfish

Trout

#### Intl. Outlook

Tilapia

Salmon

Shrimp

Mollusk

Ornamental

#### Tables

Catfish

Trout

Selected Imp./Exp.

Shrimp

Salmon

Tilapia

#### Web Sites

Catfish Production

Catfish Processing

Trout

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Oct. 10, 2002  
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Outlook Board.

Per capita seafood consumption in the U.S. varied within a 1-pound range, from 14.6 pounds to 15.6 pounds between 1990 and 2000, (2000 is the last year data are available for per capita consumption). So while seafood supplies were able to keep pace with population growth, there was basically no growth in seafood consumption over this time period. This lackluster consumption growth came in a decade where normally some increase would be expected. The traditional thinking is that rising income and increasing amounts of food consumption in the away-from-home market are both factors that will boost seafood consumption. Yet, while there were strong increases in disposable income and a continued growth in the percentage of meals eaten away from home, during the 1990-2000 period, per capita seafood consumption was basically flat.

The fact that there was no overall growth in per capita seafood consumption does not mean that all was static in seafood consumption. What has occurred is that seafood consumption has become more heavily concentrated in a small number of species and a larger proportion of our seafood consumption is coming from foreign sources. For example, in 2000 if you assume that none of our exports are reexports of foreign landings, then roughly 45 percent of our seafood consumption came from imports. In 1990, per capita seafood consumption in the United States was 15.0 pounds. This was divided among 9.6 pounds from fresh and frozen products, 5.1 pounds from canned products, and 0.3 pound from cured products. By 2000 this breakout had changed slightly, with fresh and frozen products totaling 10.5 pounds, canned products falling to 4.8 pounds, and cured products remaining stable at 0.3 pound. Much of the growth in fresh and frozen products was due to the growth in shrimp consumption. Between 1990 and 2000, per capita shrimp consumption in all forms rose 1 pound, from 2.2 to 3.2 pounds, which is slightly over 20 percent of total seafood consumption.

Seafood imports to the United States contain a wide variety of farmed products. The most important are shrimp, Atlantic salmon, and tilapia, but also included are catfish from Vietnam, crayfish and mollusk products from China, and mussels from Canada and New Zealand. In 2001, imports of shrimp totaled 880 million pounds, Atlantic salmon

imports were 360 million, and tilapia imports were 125 million. If only half of the shrimp imported were farmed this still represents about 925 million pounds of imported aquacultural products, worth about \$2.7 billion. To put the size of these imports in perspective, the U.S. poultry industry, the world's largest exporter, exported 6.8 billion pounds of poultry products, valued at \$2.3 billion in 2001. The value of farm-raised shrimp, Atlantic salmon, and tilapia imported to the United States was about \$400 million greater than the value of the broiler, other chicken, and turkey products exported.

The outlook for domestic aquacultural production, and exports and imports of aquaculture products, is based on a number of factors. First, the expectation is that U.S. economic growth will be slow in 2002, but will strengthen in the second half of the year. Second, the economic growth (albeit slow) is expected to translate into higher demand for seafood products, especially in the foodservice sector. Third, the dollar is expected to remain relatively strong against most other currencies, a situation encouraging further growth in seafood imports and making U.S. exports less competitive. Fourth, although markets for their products may be somewhat depressed, aquaculture producers who utilize a primarily grain-based feed should be able to take advantage of expected relatively low grain prices. This will be especially welcomed by the catfish industry. The catfish industry needs feed costs to be as low as possible to help at least partially offset some of the impact of the current low prices facing the industry.

In terms of competing meat products, U.S. production of broilers is expected to grow somewhat in 2002, but beef production is expected to be lower, and pork production is expected to be about the same as the previous year. This slower growth in meat production is expected to provide some boost in the demand for seafood products. An increase in demand for seafood might provide some upward strength in prices for domestic farm-raised products, but it would also tend to increase demand for imported seafood.

### ***Catfish Sales Higher in 2002 Despite Low Prices***

Catfish sales by growers to processors are expected to increase in 2002 and reach between 603 million and 615 million pounds, up 1 to 3 percent from 2001. Sales in 2001 had been mixed. Grower sales were higher than the previous year in April and May and again in December. However, in most of the rest of the year, grower sales were about even or lower than the previous year. Catfish processor sales were also weak, finishing the year at 296 million pounds, down less than 1 percent from 2000. The slowdown in processor sales caused inventory to accumulate throughout the year. Processors' holdings of finished products at the end of January 2002 were 1.8 million pounds above the previous year. The lack of growth in grower and processor sales has been overshadowed by the continuing decline in grower and processor prices. Farm prices fell almost continually during 2001. Prices started 2001 at 69 cents a pound and then moved downward, finishing at 55 cents a pound in December. Average processor prices followed roughly the same path, moving from \$2.32 a pound in January 2001 to \$2.09 a pound in December.

Based on grower inventories reported for the beginning of January 2002, grower sales are expected to show modest increases during first-half 2002 compared with the previous year. Boosted by relatively good grower prices in most of 2000, growers had increased capacities and stocks of fish for breeding. Entering 2002, growers still have relatively large holdings of small food-size fish, up 20 percent from the previous year. These will be fish sold during the first quarter of 2002. This is normally the period of highest demand due to greater fish consumption during the lenten period. Most of the increase in holdings of small food-size fish are in the three largest catfish producing States (Mississippi, Alabama, and Arkansas). The large inventory of small food-size fish held by growers is expected to prevent any significant upward movement in farm prices during the first quarter of 2002. Grower sales in the second half of 2002 will be affected not only by grower supplies but also by general economic performance and red meat and poultry supplies. Higher poultry supplies are expected to affect catfish sales in grocery stores. However, in the second half of 2002, catfish sales are expected to gain some strength, helped by lower beef and pork supplies. Farm prices for catfish are expected to remain depressed during the first quarter of 2002. In the second half of 2002,

grower prices are expected to show a little more strength, but still remain lower than the average prices seen over the last 5 years.

In 2002, prices for both corn and soybeans are expected to again remain relatively low. Over the last several years most catfish farmers have benefited from low feed prices. The combination of low feed costs and relatively low interest costs is expected to help catfish producers weather the prolonged period of low grower prices that has affected the industry since the last quarter of 2000. The latest forecasts indicate that corn prices are expected to be slightly higher than in 2001, but prices for soybean products are expected to be lower than the previous year.

### ***Catfish Production Expected To Rise Slightly in 2002***

Catfish growers indicated that at the start of 2002 stocks of broodfish had declined, but that stocks of all classes of food-size fish were higher than the previous year. The January 1 survey is the only one that includes data from States other than the four largest producing States (Mississippi, Alabama, Arkansas, and Louisiana), which account for the vast majority of catfish production. This is the fourth year in a row that inventory levels of food-size fish have increased, with the level of grower-held inventories in 2002 up considerably from 2001.

At the beginning of 2002, the total number of food-size fish held by growers was estimated at 404 million, up 21 percent from the previous year. There were large inventory increases in each of the three food-size fish categories. The inventory of large food-size fish was 56 percent above the beginning of 2001. The strong increases in inventory numbers in this size class came in Alabama, Arkansas, and Mississippi. The number of medium food-size fish held by growers totaled almost 106 million, up 20 percent from the previous year. In this size class, large increases in holdings by growers in Alabama, Arkansas, and Louisiana more than offset a small decline in holdings, 5 percent, in Mississippi. Small food-size fish normally account for the bulk, in terms of numbers, of growers' food-size inventories. These fish average right around 1 pound and will make up the core of fish processed during first-quarter 2002. At the beginning of 2002, growers estimated that they held 287 million small food-size fish on their farms. This is up by about 47 million or 20 percent more small

food-size fish than had been in inventory at the beginning of 2001. Over the last 2 years, inventory holdings of small food-size fish have risen by about 87 million. It is this growth in production, plus a number of other factors, that have placed a great deal of downward pressure on grower prices.

The inventory of all food-size fish held by growers at the beginning of each year forms the bulk of readily available catfish for processing plants to utilize during the first quarter of the year. Because colder water temperatures reduce the rate of growth and weight gain in catfish, the number of market-size fish already being held in ponds at the beginning of the year represents the supplies available to processors. With a strong increase in the inventory of food-size fish, a slower economy than the previous year, and increased competition from imports, catfish prices are expected to remain depressed. Prices are not expected to move upward even though the first quarter of the year is normally the strongest demand period of the year.

The January 1, 2002, inventory report indicated a 20-percent decrease from 2001 in the number of stockers held by growers, this number was also 14 percent lower than the grower inventory at the start of 2000. The number of fingerlings in inventory at the start of 2002 was 1.066 billion, 4 percent higher than the previous year and about even with the holdings in January 2000. The numbers of stockers and fingerlings in inventory at the start of the year will become the majority of fish available to processors after the first quarter of the year. With a lower inventory of stockers and only a small growth in fingerling holdings, the total available supply of catfish for processing is expected to decline in the second and third quarters. With current prices so low, many growers are likely to lower stocking rates for the beginning through the middle of 2002. While a smaller supply of catfish would normally be forecast to put some upward pressure on prices, the strength of the economy and supplies of competing meat and poultry products will also have a strong influence.

### ***Farm Prices To Start Lower in 2002***

In 2000, the farm price for catfish averaged 75.1 cents a pound. Prices were as high as 76 cents a pound in July 2000, but then came a downward slide in the second half of 2000, ending at 68 cents a pound in December. Large holdings by growers, high stocks of processed fish, and an influx of imported fish all

combined to keep downward pressure on prices at the beginning of 2001. Over the first half of 2001, farm prices averaged 69 cents a pound, down 12 percent from the previous year. As the economy declined in the second half of 2001, farm prices fell even lower, ending the year at only 55 cents a pound. This was the lowest price for catfish since January 1992. The expected scenario for 2002 is for continued low prices during the first 3 to 4 months as the large supplies of food-size fish are utilized. Prices after this period are expected to show some upward movement as the much lower supplies of fish that were in the stocker class at the beginning of the year become the major source of supply for processors. Wholesale prices will be heavily influenced by the impact of the general economic situation on sales in the foodservice sector.

During 2001, farm sales to processors totaled 597 million pounds, with an average price of 64.5 cents per pound. This implies gross sales of \$385 million for catfish growers, down over 13 percent from a year earlier. Including sales of broodfish, stockers, and fingerlings to other producers and other outlets, catfish growers reported total sales of \$443.4 million in 2001, 12 percent lower than in 2000. For 2002, with an expected small increase in sales and relatively flat farm prices, grower sales of catfish to processing plants are expected to generate between \$390 million and \$405 million.

### ***Acreage Up Slightly***

Growers indicated that during the first half of 2002 they would have about 197,000 acres of pounds in catfish production. This is up slightly from the same period in 2001. Part of the reason that acreage in production has not reacted more strongly to lower prices is the fixed nature of catfish ponds. With a high cost of production and a relative lack of alternative crops, if a grower has ponds, they will likely keep them in production. With the current low farm prices, there may be some change in the way that the ponds are utilized. There may be a drop in stocking densities to reduce disease risks and hopefully increase feed conversion rates. The January survey of growers reported that pond acreage for production of food-size fish was down 2 percent, from the previous year, to 160,000 acres. In addition, growers indicated they expected to add 2,725 acres of new ponds, which would be available for production by the beginning of the second half of 2002. This is down 46 percent from

the 5,065 acres in ponds that growers indicated they were going to add in the first half of 2001. Most of the new pond construction is in Mississippi, but the level is much lower than seen in the last several years.

### ***Processor Revenues Down 6 Percent***

During 2001, catfish processors sold 296.4 million pounds of product, down less than 1 percent from a year earlier. For 2001, the weighted average price for processed catfish products was \$2.25 per pound, down 5 percent from 2000. Average processor prices had risen in each of the 3 previous years. Much of the decrease in the average price was due to weak sales in the frozen market, where the average price fell by 16 cents a pound. The weighted average prices for fresh products also declined, but by only 7 cents a pound. With a decrease in sales volume and a lower average price, gross processor revenues from catfish sales declined by \$66 million in 2001, 6 percent lower than in 2000. With the expectation of slightly higher sales levels and relatively stable prices, processor revenues are forecast to reach between \$675 million and \$690 million in 2002.

Processor sales were about even with the previous year throughout most of 2001. Overall sales of catfish were down, but sales of fresh products rose by 3.5 percent. Most of the increase in sales of fresh products was due to a 9.6-percent increase in fresh fillet sales. Sales of fresh whole fish declined 4.2 percent and sales of fresh other products were about even with the previous year. While the volume rose, the average price for fresh catfish products fell 3.3 percent. The average price of whole, fillet, and other products all were between 4.6 and 5.7 percent lower than the previous year. The average price for fresh products decreased less, because the increase in sales of fillet products pushed the average price higher. The average price of frozen catfish products was \$2.29 a pound in 2001, down 6.5 percent from the previous year and the lowest price since 1993. The largest decline was for frozen fillets. The average price for frozen fillets was down 7.5 percent compared with 2000, and the volume of sales fell by 3.8 percent. This category was the one most affected by the increase in catfish imports, which were primarily frozen catfish fillets from Vietnam.

Sales of frozen other products in 2001 actually rose to a record 48 million pounds, but the average price for

these products fell by 1.6 percent, the 6th year in a row that the annual average price for frozen other catfish products had declined.

### ***Trout Sales at \$76 Million in 2001***

The most recent survey of the domestic trout industry by the National Agricultural Statistics Service (NASS) showed total sales of trout at \$76 million, up slightly from 2000. The survey also included 260 operations that distributed trout in 2001. These trout are distributed for restoration, conservation, or recreational fishing purposes. Many of these operations are State or Federal hatcheries. The value of the fish distributed for these purposes was estimated at \$66.6 million in 2001 and is separate from the figures given for the value of trout sold.

Most of the increase in sales came from higher sales of food-size fish. In terms of the trout report, food-size fish are those 12 inches or more in length. Sales of food-size fish totaled \$64.5 million, up 9 percent from the previous year. In 2001, 68 percent of food-size fish sold went to processors, with another 19 percent going for recreational purposes. Although Idaho is by far the largest producer, higher sales in California, North Carolina, and Oregon were able to more than offset the decline in food-size trout sales in Idaho.

Sales of stockers (fish 6 to 12 inches) totaled 2.3 million pounds with a value of \$5.4 million. The decrease in the value of stocker sales was due to a smaller average live weight. Both the number of stockers sold was higher and the average price per pound of stockers rose from \$2.12 in 2000 to \$2.40 in 2001. Stockers are sold to trout farmers for further growout or sold to private groups for placement in specific lakes or rivers. In 2001, the value of fingerling sales, fish under 6 inches, declined 8 percent as the number and total liveweight of fingerlings declined. After falling heavily in 2000, sales of trout eggs rose to \$5.1 million in 2001, up 27 percent. While the quantity of eggs sold increased, the demand was also strong as the average price per 1,000 eggs rose by slightly over one dollar.

### ***Tilapia Imports Up 39 Percent in 2001***

Like salmon and shrimp, the quantity of imported tilapia imports surged in 2001 while the value rose at a slower rate reflecting falling prices for most tilapia products. Tilapia imports reached 124 million pounds in 2001, up 39 percent or almost 35 million pounds. The increase in imports was in all of the product categories. Imports of frozen whole fish rose by 39 percent and accounted for 69 percent of all tilapia imports. Imports of fresh fillets were 36 percent higher, totaling 22.6 million pounds. Frozen fillet imports had the greatest increase, rising by 42 percent. The value of tilapia imports increased 26 percent in 2001, to \$127.8 million. The smaller increase in value was due to falling prices for both frozen whole fish and frozen fillets. Prices for fresh fillets remain at about the same level as the previous year. Although frozen whole tilapia dominates imports on a quantity basis, imports of fresh and frozen fillets have been growing rapidly and, on a value basis, accounted for 70 percent of all tilapia imports. The poundage of tilapia production required to supply the U.S. market was 210 million pounds of live fish.

After falling in 2000, imports from Taiwan rose by 68 percent in 2001 to 65.7 million pounds. Almost all the increase in shipments from Taiwan was in the frozen whole fish segment of the market. Until the last 2 years, the frozen whole fish segment of tilapia imports had been dominated by shipments from Taiwan. However, in 2000, China began shipping significant quantities of frozen whole fish. With the large increase in the quantity of frozen fish imported to the United States, the price of frozen whole fish has continued to erode. Average prices in 2001 for frozen whole fish imports fell to 45 cents a pound, a dime lower than in 2000.

The fresh fillet market had big increases in both the total quantity of shipments and their total value. Even though the quantity of imports rose by 6 million pounds (36 percent), the average price remained strong at \$2.70 a pound, about a penny higher per pound than in the previous year. Fresh tilapia fillets are exported to the United States primarily by growers in Honduras, Costa Rica, and Ecuador. Between 1999 and 2001, shipments of fresh fillets grew by 93 percent, and yet the average price has also grown, from \$2.21 in 1999 to \$2.70 a pound in 2001. The increase in volume and continued price strength have made fresh fillets a major

component of the tilapia market, accounting for 18 percent of all imports, on a quantity basis, and 48 percent on a value basis. Shipments from Ecuador continue to be the fastest growing part of this segment of the tilapia market. In 2001, shipments from Ecuador were 10.8 million pounds, up from less than 4 million pounds in 1999. Producers in Ecuador entered the tilapia business as a way to diversify some of their production away from shrimp. If the demand for fresh fillets remains strong, keeping prices at current levels, more shrimp ponds in Ecuador are likely to be converted to tilapia production.

In the frozen fillet segment, imports from China and Indonesia have increased rapidly over the last 2 years, more than offsetting the decline in shipments from Taiwan. Imports from Indonesia reached 4.8 million pounds, almost double what their imports were in 1999. Another factor in the rise of frozen fillets from Indonesia has been that their products sell at a much higher price. In 2001, the average price of frozen fillets from Indonesia was \$2.25 a pound, well above the average value of frozen fillets from China or Taiwan (around \$1.55 a pound). While the market for frozen fillets continues to grow, producers in China and Taiwan are currently faced with prices that are low enough to depress economic incentives to process the tilapia into fillets.

Tilapia imports for 2002 are expected to reach 133 million to 136 million pounds on a product-weight basis and 225 million to 231 million pounds on a live-weight basis. The value of imports is expected to reach between \$136 and \$140 million in 2002. Average import values are expected to increase slightly as imports of fillets continue to increase as a percentage of the total market. However, prices for most tilapia products are not expected to show much increase, and they should be pressured by rising imports from Ecuador and China.

### ***Atlantic Salmon Imports Up 13 Percent in 2001***

U.S. Atlantic salmon imports in 2001 totaled 326 million pounds at a value of \$713 million. This is an increase of 13 percent in quantity, but a decrease of 4 percent in value. The decline in the value of Atlantic salmon imports was due to a 37-cent-a-pound decrease in unit value to \$2.19 a pound. This is the second consecutive year that unit prices have declined.

Although the decline in 2000 was relatively small, the size of 2001's reduction leaves returns to many producers at or below their average cost of production.

While imports of fresh whole Atlantic salmon products increased slightly, imports of frozen whole products declined. This leaves almost all the increase in fresh or frozen filleted products. In 2000, imports of filleted products grew 35 percent to 159 million pounds and rose an additional 25 percent to 198 million pounds in 2001. This rapid growth has changed imports of filleted products into by far the largest of the three-product categories. In 2001, the quantity of imported filleted products accounted for 61 percent of all imported Atlantic salmon products. The impact of this strong growth in imports of filleted products has been the decline in the average unit value of the imports. In 1999, the average price of filleted imports was \$2.83 a pound, 42 cents a pound more than the average price for fresh whole salmon. In 2000, the average price for fresh whole salmon and salmon fillets both declined, and the gap between the two actually increased to 47 cents a pound. The prices for fresh whole fish and filleted products declined again in 2001, and the much larger decrease in prices for filleted products left it only 8 cents a pound more than the price for fresh whole fish. If this small price differential between fresh whole fish and filleted products continues, we can expect that most future growth in Atlantic salmon imports will be in filleted products. Importers will have every incentive to use fillets whenever possible because of the much better value.

Chilean producers continued to be the largest suppliers of filleted product to the U.S. market by far, accounting for over 80 percent of total imports. However, imports of fillets from Canada grew by 61 percent in 2001. Canadian producers are likely to fillet a larger percentage of their production if they agree that this seems to be where the market will continue to expand in the future. There is a considerable price difference between the filleted products shipped by the Canadians and Chileans. The average for filleted Canadian product in 2001 was \$3.30 a pound, while the average for Chilean product was only \$2.00 a pound.

While economic growth in the United States in 2002 is forecast to be relatively weak, imports of Atlantic salmon are expected to continue to expand. Shipments in 2002 are expected to be near 345 million pounds and \$760 million in value. Demand for salmon products is expected to remain relatively strong, especially from the restaurant industry. A strong dollar will make

imports relatively less expensive, especially against the relatively weak Canadian dollar. However, there is the question of whether producers can afford to expand production considering the current prices they face.

### ***Shrimp Imports Approach 900 Million Pounds***

U.S. shrimp imports continued to grow in 2001, up 16 percent to 883 million pounds. However, the value of shrimp imports fell by 3 percent to \$3.6 billion. With rising volume and falling total value, the average value of a pound of imported shrimp declined by 17 percent to \$4.11, 83 cents lower than the previous year.

Shrimp imports are reported in 17 different categories, but in the shrimp import table these 17 categories aggregated into frozen, fresh, and prepared shrimp. In 2001, the growth in the shrimp imports came almost solely from higher shipments of frozen and prepared products as the quantity of fresh imports was only 3.4 million pounds. Unlike previous years, the increase in the volume of shrimp imported was strongest in frozen imports.

Of the top eight countries exporting shrimp to the United States the only one that showed a strong increase in shipments of frozen products was Ecuador. Shipments from Ecuador started to rebound in 2001 after falling heavily in 2000. Total frozen exports from Ecuador were 59 million pounds in 2001, an increase of 40 percent from the previous year, but that total is only 53 percent of what Ecuador shipped to the United States in 1999. The increased imports came as producers in Ecuador expanded production after the serious problems they had with disease outbreaks have seemed to ease.

The top eight exporters account for about two-thirds of all frozen shrimp shipments, but these imports do not seem to be growing more concentrated, as they have for a number of other commodities. In both 2000 and 2001, there was strong growth in imports of frozen shrimp from the "other" countries. A large percentage of these other country imports come from the smaller Asian producers and a number of countries in Central America such as Panama, Costa Rica, and Honduras.

In 2001, there was a large decline in the average price for imported frozen shrimp. With the total quantity of imports rising by 15 percent and the total value falling by 3 percent, average prices declined 77 cents a pound from the previous year to \$4.14 a pound. The largest portion of this decline was due to falling prices for Thai

shrimp. In 2000, the average price of frozen shrimp imports from Thailand was \$5.31 a pound. In 2001, the average price fell to \$4.30 a pound. There are two factors that can influence the average price of imports from a specific country. First, a greater supply of shrimp or a lowering of demand due to declining economic conditions can reduce prices across the board. Second, there can be a shifting in the size of the shrimp imported from a country. In some years it is possible to get a large number of shrimp, but due to some conditions, such as poor water temperatures, the shrimp do not grow as large. The impact this can have on the average price is due to premiums received for larger shrimp. In 2001, the average price for the largest class of frozen shrimp (under 20 shrimp per kilo) was \$6.95 a pound. The average price for the smallest class of shrimp (over 200 shrimp per kilo) was \$2.58 a pound.

The average price for imported prepared shrimp declined even more sharply than the frozen price. Average prices for prepared shrimp products in 2000 were over \$5 a pound. In 2001, prices fell to just over \$4 a pound, a 20-percent decline. Since Thailand dominates this portion of the market, they suffered the largest decline in value, down about \$100 million from the previous year.

While imports from Thailand continue to constitute the majority of shrimp coming into the United States, over the last 2 years the source that has contributed the most to the growing imports has been shrimp coming from the countries grouped in the "other" category. Between 1999 and 2001, overall shipments of shrimp have increased by 151 million pounds. In the same period, shrimp shipments from the countries in the "other" category rose by 100 million pounds. Higher imports have also been recorded from China. Shipments from China in 2001 totaled 62 million pounds, up over 54 percent from the previous year and around the same quantity as imports from Ecuador and Mexico, although the unit value for China's shrimp imports is not as high. Barring any disease outbreaks, China's shrimp imports are expected to be a major factor in the future as it expands shrimp production.

While shrimp imports are a vital part of the overall shrimp supplies, domestic shrimp harvest is also a major supplier, especially to the fresh shrimp market. In 2000, the last year that data are available, the domestic shrimp harvest was 332 million pounds. Most of this harvest comes from the Gulf States. The

332 million pounds were up about 30 million pounds from the previous year and about 30 million pounds higher than the average for the previous 5 years. Domestic farmed shrimp production is relatively small, accounting for less than 5 percent of total domestic production.

In 2002, shrimp imports are expected to increase in quantity, but at a slower rate than in the past several years. After the strong decline in 2001, the unit value is expected to increase only slightly, leaving the overall value of shrimp imports higher than in 2001. A relatively weak domestic economy in 2002 is expected to depress the demand for shrimp, but this should be partially offset by the strong value of the dollar making imported goods relatively less expensive. Shrimp prices are expected to be under some downward pressure from the weakness in the Japanese economy. Japan is traditionally the world's largest shrimp importer.

### ***Oyster and Clam Exports Rise; Mussel Exports Down in 2001***

In 2001, the value of oyster and clam exports both registered double-digit increases. Oyster exports rose 14 percent to \$8.2 million, and clam exports rose by 17 percent to \$6.6 million. Oyster exports have risen for three consecutive years, increasing 39 percent during this period. Clam exports increased on both a quantity and value basis in 2001, but they were still well below the levels they achieved in 1998 and 1999. Mussel exports declined on a quantity and value basis. The majority of mollusk exports go either to Canada or Asian countries, specifically to Japan and Korea. Exporting to Canada has been difficult over the last several years as the weakness of the Canadian dollar relative to the U.S. dollar has increased the prices of U.S. products. The weakness in the Japanese economy has also dampened the export potential for U.S. mollusks. The outlook for 2002 is for slow growth for mollusks as a strong dollar continues to make exports relatively more expensive.

### ***Imports Decline for All Mollusks***

After increasing in each of the 2 previous years, imports of oysters, mussels, and clams all declined on a quantity basis in 2001. With a strong dollar relative to most currencies, mollusk imports would have been expected to increase. However, a weaker U.S. economy is expected to adversely impact restaurant

sales, the main outlet for mollusk sales. If the domestic economy can begin to regain strength in the second half of 2002, and foodservice expenditures expand, then mollusk imports are expected to again increase.

In 2001, mussel imports continued to be the largest mollusk import on a quantity and value basis. Mussel imports were 40.0 million pounds in 2001, down 7 percent from the previous year, but still considerably higher than in 1998 and 1999. The average price for imported mussels remained relatively steady, so the decrease in import value was 8 percent. The majority of imported mussels come from farmed production in Canada or New Zealand. With the U.S. dollar expected to remain strong against the Canadian dollar, mussel prices are forecast to remain steady in 2002. Increases in imports will be dependent on the strength of the domestic economy.

### ***Ornamental Fish Exports Decrease***

U.S. exports of ornamental fish fell heavily again in 2001. After recording a small increase in 1999, U.S. exports of ornamental fish decreased 36 percent over the last 2 years. Domestic producers have been hampered by the impact of a strong dollar, making their products less competitive on world markets. The only major export market that has managed to stay relatively strong is Canada. With the decline in exports to most other markets, shipments to Canada accounted

for 58 percent of all exports. Even shipments to Canada were down in 2001, falling by 4 percent to \$4.0 million.

The largest impact of economic uncertainty and a strong dollar has been on U.S. exports to Japan. Japan had been our second largest market after Canada, but shipments to Japan continue to spiral downward. Shipments of ornamental fish to Japan stood at \$3.9 million in 1997. In 2001, shipments had fallen to \$364,000.

While a strong dollar has hurt ornamental fish exports, it has helped other countries exporting ornamental fish to the United States. In 2001, the value of ornamental fish imports rose only a small amount (up only 0.2 percent). The majority of our imports of ornamental fish come from Asia, with a small number of countries accounting for the majority of imports. Thailand is the largest supplier to the United States, and together with Singapore, Indonesia, the Philippines, and Malaysia, account for almost 70 percent of the total shipments. Higher shipments from these countries offset falling shipments from both Hong Kong and Japan. Colombia, Brazil, and Peru are the largest suppliers of ornamental fish to the United States in the Western Hemisphere, but shipments from these countries have fallen over the last several years.

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NASS Trout, <http://usda.mannlib.cornell.edu/reports/nassr/other/ztp-bb/>

National Marine Fisheries Service, Fisheries of the United States (wild harvest data), <http://www.st.nmfs.gov/st1/fus/fus00/index.html>

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Table1--Catfish: Supply, sales, prices, and inventory

| Item                   | 2001              |        |        |        |        |        |        |        |        |        |        |        | 2002   |
|------------------------|-------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
|                        | Jan.              | Feb.   | Mar.   | Apr.   | May    | June   | July   | Aug.   | Sept.  | Oct.   | Nov.   | Dec.   | Jan.   |
| <b>Supply</b>          | 1,000 lbs.        |        |        |        |        |        |        |        |        |        |        |        |        |
| Grower sales 1/        | 46,999            | 50,257 | 57,766 | 52,478 | 51,736 | 47,883 | 47,829 | 51,690 | 49,699 | 52,264 | 44,670 | 43,837 | 52,551 |
| Processor sales        | 24,507            | 25,968 | 28,752 | 25,167 | 24,728 | 23,690 | 24,816 | 26,004 | 24,210 | 25,083 | 21,807 | 21,635 | 27,173 |
| Fresh                  | 9,843             | 10,646 | 13,167 | 10,662 | 10,140 | 9,586  | 9,799  | 9,953  | 9,887  | 9,997  | 8,551  | 8,544  | 10,923 |
| Whole                  | 3,516             | 3,242  | 4,260  | 3,644  | 3,271  | 3,166  | 3,233  | 3,204  | 3,174  | 3,294  | 2,865  | 2,803  | 3,713  |
| Fillets                | 4,884             | 6,112  | 6,751  | 5,709  | 5,587  | 5,122  | 5,191  | 5,313  | 5,264  | 5,273  | 4,463  | 4,489  | 5,684  |
| Other                  | 1,443             | 1,292  | 2,156  | 1,309  | 1,282  | 1,298  | 1,375  | 1,436  | 1,449  | 1,430  | 1,223  | 1,252  | 1,526  |
| Frozen                 | 14,664            | 15,322 | 15,585 | 14,505 | 14,588 | 14,104 | 15,017 | 16,051 | 14,323 | 15,086 | 13,256 | 13,091 | 16,250 |
| Whole                  | 1,156             | 1,253  | 1,289  | 1,088  | 1,128  | 1,111  | 967    | 1,154  | 937    | 1,062  | 903    | 809    | 1,146  |
| Fillets                | 9,831             | 9,678  | 9,990  | 9,479  | 9,511  | 9,077  | 9,973  | 10,890 | 9,347  | 10,079 | 8,640  | 8,664  | 10,977 |
| Other                  | 3,677             | 4,391  | 4,306  | 3,938  | 3,949  | 3,916  | 4,077  | 4,007  | 4,039  | 3,945  | 3,713  | 3,618  | 4,127  |
| Processor inventory 2/ | 11,855            | 10,754 | 11,229 | 11,730 | 12,126 | 12,261 | 11,794 | 11,581 | 12,774 | 13,761 | 14,315 | 14,997 | 13,644 |
| Fresh                  | 916               | 856    | 700    | 855    | 710    | 742    | 773    | 734    | 879    | 929    | 625    | 711    | 893    |
| Whole                  | 222               | 215    | 146    | 229    | 170    | 154    | 169    | 169    | 164    | 197    | 143    | 139    | 210    |
| Fillets                | 586               | 536    | 470    | 520    | 453    | 493    | 516    | 458    | 559    | 617    | 404    | 455    | 551    |
| Other                  | 108               | 105    | 84     | 106    | 87     | 95     | 88     | 107    | 156    | 115    | 78     | 117    | 132    |
| Frozen                 | 10,939            | 9,898  | 10,529 | 10,875 | 11,416 | 11,519 | 11,021 | 10,847 | 11,895 | 12,832 | 13,690 | 14,286 | 12,751 |
| Whole                  | 727               | 842    | 867    | 888    | 819    | 633    | 439    | 495    | 549    | 539    | 588    | 730    | 814    |
| Fillets                | 7,787             | 6,672  | 7,197  | 7,248  | 7,999  | 8,349  | 8,374  | 8,254  | 9,130  | 10,068 | 10,773 | 11,231 | 9,750  |
| Other                  | 2,425             | 2,384  | 2,465  | 2,739  | 2,598  | 2,537  | 2,208  | 2,098  | 2,216  | 2,225  | 2,329  | 2,325  | 2,187  |
| <b>Prices</b>          | Dollars per pound |        |        |        |        |        |        |        |        |        |        |        |        |
| Farm price 3/          | 0.69              | 0.70   | 0.70   | 0.69   | 0.69   | 0.67   | 0.66   | 0.62   | 0.61   | 0.60   | 0.57   | 0.55   | 0.55   |
| Processor prices       | 2.32              | 2.37   | 2.33   | 2.34   | 2.33   | 2.28   | 2.26   | 2.24   | 2.18   | 2.16   | 2.11   | 2.09   | 2.08   |
| Fresh                  | 2.20              | 2.32   | 2.22   | 2.26   | 2.29   | 2.24   | 2.22   | 2.19   | 2.15   | 2.11   | 2.06   | 2.01   | 1.99   |
| Whole                  | 1.59              | 1.68   | 1.63   | 1.65   | 1.65   | 1.62   | 1.59   | 1.55   | 1.53   | 1.49   | 1.42   | 1.37   | 1.36   |
| Fillets                | 2.80              | 2.79   | 2.80   | 2.80   | 2.80   | 2.78   | 2.77   | 2.75   | 2.69   | 2.63   | 2.60   | 2.55   | 2.52   |
| Other                  | 1.64              | 1.68   | 1.57   | 1.64   | 1.69   | 1.64   | 1.61   | 1.57   | 1.52   | 1.59   | 1.59   | 1.53   | 1.53   |
| Frozen                 | 2.40              | 2.41   | 2.43   | 2.40   | 2.35   | 2.30   | 2.29   | 2.27   | 2.21   | 2.20   | 2.15   | 2.14   | 2.15   |
| Whole                  | 1.98              | 2.01   | 1.98   | 2.01   | 2.00   | 1.94   | 1.95   | 1.97   | 2.00   | 1.97   | 1.95   | 1.92   | 1.90   |
| Fillets                | 2.72              | 2.74   | 2.75   | 2.73   | 2.70   | 2.67   | 2.61   | 2.55   | 2.51   | 2.48   | 2.44   | 2.41   | 2.40   |
| Other                  | 1.67              | 1.78   | 1.81   | 1.70   | 1.62   | 1.54   | 1.59   | 1.58   | 1.57   | 1.55   | 1.52   | 1.54   | 1.55   |

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

Source: NASS, USDA.

Table 2: 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.         |        |        |        |        |        |        |              |
| 1995   | 38,807 | 38,515 | 42,200 | 36,588 | 37,030 | 36,047             | 35,800 | 38,827 | 37,634 | 39,456 | 34,119 | 31,863 | 446,886      |
| 1996   | 38,475 | 38,004 | 46,376 | 38,557 | 39,517 | 36,810             | 39,025 | 40,463 | 38,807 | 42,070 | 37,210 | 36,874 | 472,188      |
| 1997   | 42,409 | 45,067 | 48,431 | 45,721 | 43,409 | 42,282             | 43,376 | 44,154 | 43,472 | 46,275 | 40,137 | 40,216 | 524,949      |
| 1998   | 46,723 | 47,606 | 53,761 | 49,393 | 45,218 | 46,244             | 46,383 | 47,739 | 46,579 | 47,904 | 43,224 | 43,581 | 564,355      |
| 1999   | 48,723 | 48,891 | 56,310 | 46,830 | 47,703 | 48,445             | 50,074 | 50,372 | 50,414 | 52,407 | 48,118 | 48,341 | 596,628      |
| 2000   | 50,552 | 50,942 | 56,856 | 48,781 | 48,424 | 48,011             | 49,023 | 53,204 | 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      |
| Average price paid by processors for farm-raised catfish |        |        |        |        |        | Cents per pound 1/ |        |        |        |        |        |        |              |
| 1995   | 78.0   | 79.0   | 79.0   | 79.0   | 79.0   | 79.0               | 79.0   | 79.0   | 78.0   | 78.0   | 78.0   | 78.0   | 78.6         |
| 1996   | 77.0   | 78.0   | 78.0   | 78.0   | 79.0   | 79.0               | 79.0   | 78.0   | 77.0   | 76.0   | 75.0   | 73.0   | 77.3         |
| 1997   | 73.0   | 73.0   | 73.0   | 73.0   | 73.0   | 72.0               | 71.0   | 70.0   | 69.0   | 69.0   | 69.0   | 69.0   | 71.2         |
| 1998   | 69.0   | 73.0   | 78.0   | 79.0   | 79.0   | 78.0               | 76.0   | 74.0   | 73.0   | 71.0   | 70.0   | 70.0   | 74.2         |
| 1999   | 70.3   | 71.4   | 73.2   | 75.6   | 77.7   | 77.5               | 76.8   | 74.3   | 72.8   | 71.6   | 71.3   | 71.6   | 73.7         |
| 2000   | 74.4   | 78.8   | 78.9   | 78.9   | 78.5   | 78.6               | 76.0   | 74.1   | 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         |
| Catfish sold by processors                               |        |        |        |        |        | 1,000 lbs.         |        |        |        |        |        |        |              |
| 1995   | 19,191 | 20,008 | 21,702 | 18,649 | 19,169 | 18,631             | 18,157 | 20,187 | 18,660 | 19,920 | 16,680 | 16,018 | 226,972      |
| 1996   | 20,322 | 20,613 | 22,704 | 20,276 | 20,669 | 18,074             | 18,719 | 20,217 | 19,642 | 20,842 | 18,204 | 16,898 | 237,180      |
| 1997   | 20,746 | 23,058 | 24,624 | 22,154 | 22,444 | 21,471             | 21,866 | 22,548 | 21,518 | 23,408 | 19,645 | 18,278 | 261,760      |
| 1998   | 23,576 | 26,650 | 26,207 | 23,195 | 22,960 | 23,002             | 22,973 | 24,089 | 22,805 | 23,241 | 21,581 | 21,119 | 281,398      |
| 1999   | 23,107 | 25,780 | 28,544 | 23,488 | 23,964 | 23,720             | 25,069 | 24,618 | 24,430 | 25,229 | 22,344 | 22,372 | 292,665      |
| 2000   | 25,412 | 25,354 | 29,161 | 24,924 | 24,763 | 25,342             | 24,911 | 25,847 | 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      |
| Average price received by processors for all catfish     |        |        |        |        |        | Cents per pound    |        |        |        |        |        |        |              |
| 1995   | 234.7  | 239.7  | 241.4  | 244.0  | 244.5  | 240.2              | 241.6  | 242.0  | 241.2  | 238.2  | 236.4  | 234.7  | 239.9        |
| 1996   | 232.8  | 235.9  | 236.1  | 237.3  | 242.4  | 244.3              | 243.3  | 238.8  | 235.9  | 233.9  | 233.6  | 228.8  | 236.9        |
| 1997   | 227.7  | 230.2  | 230.4  | 227.3  | 227.9  | 226.0              | 225.6  | 225.3  | 224.8  | 220.5  | 220.3  | 223.3  | 225.8        |
| 1998   | 220.0  | 227.9  | 236.6  | 237.7  | 239.5  | 234.4              | 234.6  | 232.9  | 229.6  | 226.7  | 226.4  | 224.0  | 230.9        |
| 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        |

1/ Live weight.

Source: Monthly Catfish Processing Report, NASS, USDA.

Table 3: Catfish: Inventory as of January 1, in thousands

| State          | Broodfish |       |       | Fingerlings/fry |           |           | Stockers |         |         |
|----------------|-----------|-------|-------|-----------------|-----------|-----------|----------|---------|---------|
|                | 2000      | 2001  | 2002  | 2000            | 2001      | 2002      | 2000     | 2001    | 2002    |
| Alabama        | 138       | 155   | 70    | 54,170          | 57,000    | 53,000    | 55,440   | 60,000  | 72,800  |
| Arkansas       | 260       | 210   | 170   | 131,000         | 167,000   | 197,000   | 126,500  | 141,200 | 115,300 |
| California     | 25        | 15    | 15    | 5,910           | 4,350     | 7,350     | 2,880    | 2,820   | 1/      |
| Florida        | 1/        | 1/    | 5     | 1,200           | 240       | 5,000     | 410      | 1/      | 1/      |
| Georgia        | 6         | 20    | 20    | 1/              | 4,250     | 2,650     | 2,160    | 2,050   | 1,640   |
| Illinois       | 2         | 2     | 2     | 1/              | 1/        | 230       | 1/       | 633     | 363     |
| Kentucky       | 1/        | 1     | 1     | 180             | 750       | 780       | 1/       | 1/      | 1/      |
| Louisiana      | 1/        | 1/    | 1/    | 36,600          | 39,400    | 55,800    | 32,400   | 27,700  | 29,200  |
| Mississippi    | 870       | 860   | 800   | 805,000         | 737,000   | 727,000   | 561,500  | 601,400 | 447,400 |
| Missouri 3/    | 1/        | 10    | 1/    | 1/              | 7,400     | 1/        | 1/       | 4,500   | 3,850   |
| North Carolina | 8         | 9     | 10    | 1,920           | 1,850     | 8,420     | 3,840    | 2,920   | 2,070   |
| Oklahoma 3/    | 0         | 0     | 0     | 0               | 0         | 0         | 0        | 0       | 0       |
| South Carolina | 10        | 7     | 6     | 1/              | 1/        | 1/        | 1/       | 1/      | 1/      |
| Tennessee 3/   | 0         | 0     | 0     | 0               | 0         | 0         | 0        | 0       | 0       |
| Texas          | 16        | 7     | 6     | 750             | 570       | 670       | 320      | 1,025   | 360     |
| Other 2/       | 42        | 31    | 66    | 16,570          | 3,723     | 8,500     | 5,233    | 1,039   | 3,395   |
| Total          | 1,377     | 1,327 | 1,171 | 1,053,300       | 1,023,533 | 1,066,400 | 790,683  | 845,287 | 676,378 |

  

| State          | Small food-size |         |         | Medium food-size |        |         | Large food-size |       |        |
|----------------|-----------------|---------|---------|------------------|--------|---------|-----------------|-------|--------|
|                | 2000            | 2001    | 2002    | 2000             | 2001   | 2002    | 2000            | 2001  | 2002   |
| Alabama        | 26,010          | 32,800  | 42,800  | 12,600           | 13,100 | 20,800  | 510             | 1,090 | 2,850  |
| Arkansas       | 36,900          | 34,200  | 45,300  | 19,500           | 17,800 | 26,600  | 1,800           | 1,600 | 2,540  |
| California     | 870             | 1,900   | 1,510   | 840              | 860    | 1,640   | 340             | 380   | 270    |
| Florida        | 400             | 820     | 2,000   | 200              | 480    | 1,150   | 1/              | 1/    | 70     |
| Georgia        | 1/              | 930     | 930     | 290              | 400    | 560     | 45              | 80    | 80     |
| Illinois       | 80              | 68      | 70      | 29               | 1/     | 49      | 1/              | 1/    | 54     |
| Kentucky       | 132             | 192     | 86      | 75               | 93     | 93      | 2               | 49    | 52     |
| Louisiana      | 11,000          | 13,900  | 11,400  | 7,600            | 6,500  | 8,700   | 670             | 640   | 640    |
| Mississippi    | 120,500         | 150,200 | 179,800 | 34,360           | 46,900 | 44,700  | 1,830           | 2,420 | 3,850  |
| Missouri       | 1,150           | 1,750   | 1,460   | 590              | 580    | 490     | 130             | 165   | 175    |
| North Carolina | 1,360           | 2,570   | 1,390   | 660              | 900    | 720     | 135             | 140   | 90     |
| Oklahoma 3/    | 0               | 0       | 0       | 0                | 0      | 0       | 0               | 0     | 0      |
| South Carolina | 1/              | 170     | 530     | 330              | 1/     | 330     | 1/              | 200   | 40     |
| Tennessee 3/   | 0               | 0       | 0       | 0                | 0      | 0       | 0               | 0     | 0      |
| Texas          | 340             | 155     | 105     | 75               | 105    | 45      | 50              | 24    | 25     |
| Other 2/       | 1,290           | 0       | 0       | 0                | 208    | 0       | 300             | 84    | 0      |
| Total          | 200,032         | 239,655 | 287,381 | 77,149           | 87,926 | 105,877 | 5,812           | 6,872 | 10,736 |

1/ Data not published separately to avoid disclosing individual operations. 2/ Included Kansas in 1999. 3/ Discontinued after 1999.

Source: Catfish and Trout Production Report, NASS, USDA.

Table 4: U.S. trout sales, weight, and value of foodsize fish 1/

| State          | Total pounds sold |               | Total value of sales |               |
|----------------|-------------------|---------------|----------------------|---------------|
|                | 2000              | 2001          | 2000                 | 2001          |
|                | -- 1,000 --       |               | -- \$1,000 --        |               |
| California     | 2,360             | 2,500         | 4,508                | 5,125         |
| Colorado       | 595               | 665           | 1,446                | 1,995         |
| Connecticut    | 2/                | 2/            | 2/                   | 2/            |
| Georgia        | 370               | 265           | 729                  | 527           |
| Idaho          | 44,500            | 39,500        | 36,935               | 34,365        |
| Maine          | 2/                | 2/            | 2/                   | 2/            |
| Massachusetts  | 99                | 83            | 362                  | 282           |
| Michigan       | 388               | 330           | 776                  | 660           |
| Missouri       | 2/                | 2/            | 2/                   | 2/            |
| New York       | 80                | 83            | 329                  | 354           |
| North Carolina | 3,640             | 4,550         | 4,696                | 5,915         |
| Oregon         | 426               | 1,477         | 805                  | 1,905         |
| Pennsylvania   | 1,677             | 1,640         | 4,260                | 4,100         |
| Tennessee      | 159               | 113           | 452                  | 293           |
| Utah           | 464               | 705           | 858                  | 1,114         |
| Virginia       | 758               | 630           | 1,546                | 1,215         |
| Washington     | 2,100             | 2,590         | 2,331                | 2,590         |
| West Virginia  | 346               | 467           | 571                  | 785           |
| Wisconsin      | 502               | 618           | 1,401                | 1,644         |
| Other 3/       | 697               | 692           | 1,685                | 1,613         |
| <b>Total</b>   | <b>59,161</b>     | <b>56,908</b> | <b>63,690</b>        | <b>64,482</b> |

1/ Foodsize refers to fish 12 inches or greater.

2/ Included in "Other" to avoid disclosure of individual operations.

3/ Includes Arkansas.

Source: Catfish and Trout Production report, NASS, USDA.

Table 5: U.S. trout sales, weight, and value of stockers 1/

| State          | 2000         | 2001         | 2000          | 2001         |
|----------------|--------------|--------------|---------------|--------------|
|                | -- 1,000 --  |              | -- \$1,000 -- |              |
| California     | 195          | 290          | 396           | 766          |
| Colorado       | 300          | 225          | 801           | 720          |
| Connecticut    | 2/           | 2/           | 2/            | 2/           |
| Georgia        | 2/           | 2/           | 2/            | 2/           |
| Idaho          | 2/           | 2/           | 2/            | 2/           |
| Maine          | 25           | 2/           | 122           | 2/           |
| Massachusetts  | 2/           | 2/           | 2/            | 2/           |
| Michigan       | 78           | 42           | 207           | 116          |
| Missouri       | 2/           | 2/           | 2/            | 2/           |
| New York       | 54           | 66           | 245           | 312          |
| North Carolina | 150          | 170          | 195           | 214          |
| Oregon         | 110          | 113          | 528           | 277          |
| Pennsylvania   | 319          | 232          | 1,053         | 742          |
| Tennessee      | 2/           | 2/           | 2/            | 2/           |
| Utah           | 231          | 85           | 467           | 178          |
| Virginia       | 2/           | 2/           | 2/            | 2/           |
| Washington     | 155          | 275          | 450           | 729          |
| West Virginia  | 16           | 2/           | 35            | 2/           |
| Wisconsin      | 99           | 54           | 268           | 155          |
| Other 3/       | 1,419        | 711          | 1,911         | 1,219        |
| <b>Total</b>   | <b>3,151</b> | <b>2,263</b> | <b>6,678</b>  | <b>5,428</b> |

1/ Fish between 6 and 12 inches long.

2/ Included in "Other" to avoid disclosure of individual operations.

3/ Includes Arkansas.

Source: Catfish and Trout Production report, NASS, USDA.

Table 6: U.S. trout sales, weight, and value of fingerlings 1/

| State          | Total pounds sold |            | Total value of sales |              |
|----------------|-------------------|------------|----------------------|--------------|
|                | 2000              | 2001       | 2000                 | 2001         |
|                | -- 1,000 --       |            | -- \$1,000 --        |              |
| California     | 10                | 8          | 129                  | 129          |
| Colorado       | 11                | 10         | 42                   | 79           |
| Connecticut    | 2/                | 2/         | 2/                   | 2/           |
| Georgia        | 2/                | 2/         | 2/                   | 2/           |
| Idaho          | 2/                | 2/         | 2/                   | 2/           |
| Maine          | 2/                | 2/         | 2/                   | 2/           |
| Massachusetts  | 2/                | 2/         | 2/                   | 2/           |
| Michigan       | 8                 | 4          | 54                   | 47           |
| Missouri       | 2/                | 2/         | 2/                   | 2/           |
| New York       | 5                 | 3          | 41                   | 41           |
| North Carolina | 58                | 43         | 356                  | 346          |
| Oregon         | 2                 | 1          | 32                   | 23           |
| Pennsylvania   | 14                | 6          | 126                  | 52           |
| Tennessee      | 2/                | 2/         | 2/                   | 2/           |
| Utah           | 38                | 10         | 71                   | 32           |
| Virginia       | 2/                | 2/         | 2/                   | 2/           |
| Washington     | 52                | 16         | 252                  | 197          |
| West Virginia  | 1                 | 2/         | 5                    | 2/           |
| Wisconsin      | 12                | 3          | 63                   | 34           |
| Other 3/       | 37                | 101        | 222                  | 307          |
| <b>Total</b>   | <b>248</b>        | <b>205</b> | <b>1,393</b>         | <b>1,287</b> |

1/ Fish between 1 and 6 inches long.

2/ Included in "Other" to avoid disclosure of individual operations.

3/ Includes Arkansas.

Source: Catfish and Trout Production report, NASS, USDA.

Table 7: U.S. trout sales, number, and value of eggs 1/

| Region 2/            | Number of eggs |                | Total value of sales |              |
|----------------------|----------------|----------------|----------------------|--------------|
|                      | 2000           | 2001           | 2000                 | 2001         |
|                      | -- 1,000 --    |                | -- \$1,000 --        |              |
| Northeast            | 1,127          | 1,100          | 31                   | 25           |
| South and<br>Central | 940            | 593            | 19                   | 11           |
| West                 | 284,770        | 336,530        | 3,979                | 5,077        |
| <b>Total</b>         | <b>286,837</b> | <b>338,223</b> | <b>4,029</b>         | <b>5,113</b> |

1/ Data published at a regional level to avoid disclosure of individual operations.

2/ Regions: Northeast - CT, MA, ME, NY, PA, WV; South - AR, GA, NC, TN, VA; Central - MI, MO, WI.; West - CA, CO, ID, OR, UT, WA.

Source: Catfish and Trout Production report, NASS, USDA.

Table 8: Quantity and value of U.S. exports of selected seafood products

| Commodity                 | 1998      | 1999      | 2000      | 2001      | 1998    | 1999    | 2000     | 2001    |
|---------------------------|-----------|-----------|-----------|-----------|---------|---------|----------|---------|
| <b>Exports</b>            |           |           | \$1,000   |           |         |         | 1,000 lb |         |
| Ornamental fish           | 10,532    | 10,834    | 8,189     | 6,914     | 0       | 0       | 0        | 0       |
| Trout, live               | 365       | 340       | 185       | 271       | 0       | 0       | 0        | 0       |
| Trout, fresh & frozen     | 2,165     | 2,855     | 2,893     | 1,577     | 1,453   | 1,697   | 1,816    | 1,077   |
| Atlantic salmon, fresh    | 18,993    | 23,557    | 34,471    | 37,945    | 7,978   | 10,717  | 15,942   | 18,417  |
| Pacific salmon, fresh 1/  | 44,186    | 47,989    | 37,048    | 22,166    | 34,645  | 40,683  | 38,750   | 20,651  |
| Atlantic salmon, frozen   | 432       | 458       | 583       | 139       | 243     | 182     | 299      | 84      |
| Pacific salmon, frozen 1/ | 183,874   | 296,391   | 273,271   | 236,604   | 105,869 | 157,278 | 161,515  | 167,933 |
| Canned & pre. salmon 2/   | 143,712   | 198,518   | 147,127   | 167,825   | 77,201  | 113,556 | 81,098   | 109,109 |
| Shrimp, frozen            | 45,179    | 60,794    | 62,891    | 54,553    | 11,323  | 13,607  | 15,162   | 13,905  |
| Shrimp, fresh & pre. 3/   | 48,127    | 44,444    | 52,738    | 51,481    | 13,882  | 13,153  | 14,229   | 13,640  |
| Oysters 4/                | 5,941     | 6,563     | 7,227     | 8,238     | 2,496   | 2,727   | 3,229    | 3,915   |
| Mussels 5/                | 1,559     | 2,228     | 1,681     | 1,595     | 1,347   | 1,861   | 1,513    | 1,485   |
| Clams 6/                  | 8,383     | 8,169     | 5,649     | 6,593     | 5,375   | 5,240   | 3,413    | 3,939   |
| <b>Imports</b>            |           |           | \$1,000   |           |         |         | 1,000 lb |         |
| Ornamental fish           | 45,097    | 38,462    | 40,761    | 40,863    | 0       | 0       | 0        | 0       |
| Trout, live               | 81        | 109       | 131       | 99        | 0       | 0       | 0        | 0       |
| Trout, fresh & frozen     | 9,022     | 8,504     | 11,291    | 11,507    | 5,670   | 5,259   | 7,083    | 7,382   |
| Atlantic salmon, fresh    | 461,738   | 567,977   | 654,725   | 685,289   | 190,131 | 217,948 | 257,218  | 316,837 |
| Pacific salmon, fresh 1/  | 70,234    | 51,556    | 42,633    | 30,462    | 38,486  | 26,467  | 19,908   | 17,472  |
| Atlantic salmon, frozen   | 46,437    | 60,883    | 85,658    | 87,483    | 19,092  | 24,222  | 32,089   | 41,176  |
| Pacific salmon, frozen 1/ | 20,355    | 22,590    | 20,527    | 14,940    | 17,134  | 16,596  | 12,866   | 10,515  |
| Canned & pre. salmon 2/   | 16,243    | 23,582    | 32,021    | 36,199    | 3,430   | 5,627   | 8,893    | 11,298  |
| Shrimp, frozen            | 2,727,977 | 2,612,811 | 3,035,173 | 2,957,944 | 599,466 | 617,089 | 621,231  | 714,706 |
| Shrimp, fresh & pre. 3/   | 474,462   | 524,566   | 707,565   | 678,853   | 95,942  | 114,191 | 139,526  | 167,877 |
| Oysters 4/                | 35,723    | 38,350    | 40,763    | 36,914    | 18,049  | 18,325  | 20,810   | 18,438  |
| Mussels 5/                | 31,413    | 33,629    | 47,359    | 43,610    | 34,099  | 34,969  | 43,141   | 39,973  |
| Clams 6/                  | 5,705     | 6,167     | 7,504     | 8,296     | 6,541   | 7,537   | 8,074    | 8,007   |
| Tilapia 7/                | 52,738    | 81,897    | 101,378   | 127,797   | 61,336  | 82,837  | 89,218   | 124,202 |

1/ Also contains 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/ Tilapia, frozen whole fish plus fresh and frozen fillets.

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

Table 9: Quantity and Value of U.S. tilapia imports by country, in pounds

| Country         | Whole, frozen |            |            | Fillets, fresh |            |            | Fillets, frozen |            |            | Total      |             |             |
|-----------------|---------------|------------|------------|----------------|------------|------------|-----------------|------------|------------|------------|-------------|-------------|
|                 | 1999          | 2000       | 2001       | 1999           | 2000       | 2001       | 1999            | 2000       | 2001       | 1999       | 2000        | 2001        |
| <b>Quantity</b> |               |            |            |                |            |            |                 |            |            |            |             |             |
| Belize          | 0             | 0          | 0          | 0              | 0          | 0          | 0               | 0          | 0          | 0          | 0           | 0           |
| Honduras        | 0             | 18,519     | 0          | 1,700,842      | 2,287,868  | 3,169,571  | 44,246          | 0          | 0          | 1,745,089  | 2,306,386   | 3,169,571   |
| Nicaragua       | 0             | 0          | 0          | 25,554         | 0          | 8,479      | 11,720          | 919        | 37,357     | 37,273     | 919         | 45,836      |
| Costa Rica      | 0             | 0          | 0          | 5,092,941      | 5,916,899  | 6,853,929  | 0               | 0          | 0          | 5,092,941  | 5,916,899   | 6,853,929   |
| Jamaica         | 0             | 0          | 0          | 387,130        | 389,218    | 201,944    | 105,102         | 46,660     | 60,649     | 492,232    | 435,878     | 262,592     |
| Colombia        | 0             | 0          | 0          | 6,678          | 64,824     | 71,026     | 0               | 0          | 0          | 6,678      | 64,824      | 71,026      |
| Ecuador         | 329,312       | 53,424     | 210,317    | 3,981,492      | 7,170,492  | 10,855,988 | 123,852         | 375,770    | 307,586    | 4,434,657  | 7,599,686   | 11,373,891  |
| Thailand        | 104,172       | 43,155     | 107,582    | 0              | 0          | 3,505      | 253,359         | 393,492    | 461,218    | 357,531    | 436,647     | 572,305     |
| Indonesia       | 0             | 5,714      | 85,757     | 0              | 0          | 0          | 2,527,201       | 2,685,079  | 4,803,493  | 2,527,201  | 2,690,794   | 4,889,249   |
| China           | 10,891,374    | 25,621,665 | 23,963,559 | 83,889         | 130,997    | 421,189    | 1,652,103       | 3,991,254  | 5,575,396  | 12,627,367 | 29,743,916  | 29,960,144  |
| Taiwan          | 48,622,707    | 35,089,439 | 60,845,432 | 341,186        | 181,820    | 167,854    | 6,076,171       | 3,814,503  | 4,703,067  | 55,040,063 | 39,085,761  | 65,716,353  |
| Other           | 223,593       | 414,676    | 170,691    | 86,059         | 396,440    | 812,909    | 166,141         | 125,168    | 303,044    | 475,792    | 936,285     | 1,286,644   |
| Total           | 60,171,158    | 61,246,592 | 85,383,338 | 11,705,771     | 16,538,559 | 22,566,394 | 10,959,896      | 11,432,846 | 16,251,809 | 82,836,824 | 89,217,997  | 124,201,540 |
| <b>Value</b>    |               |            |            |                |            |            |                 |            |            |            |             |             |
| Belize          | 0             | 0          | 0          | 0              | 0          | 0          | 0               | 0          | 0          | 0          | 0           | 0           |
| Honduras        | 0             | 41,303     | 0          | 3,971,944      | 5,914,932  | 8,634,514  | 57,639          | 0          | 0          | 4,029,583  | 5,956,235   | 8,634,514   |
| Nicaragua       | 0             | 0          | 0          | 68,216         | 0          | 20,937     | 19,508          | 2,200      | 80,052     | 87,724     | 2,200       | 100,989     |
| Costa Rica      | 0             | 0          | 0          | 10,654,438     | 13,583,112 | 16,485,179 | 0               | 0          | 0          | 10,654,438 | 13,583,112  | 16,485,179  |
| Jamaica         | 0             | 0          | 0          | 1,122,091      | 1,205,593  | 647,396    | 186,590         | 86,559     | 118,700    | 1,308,681  | 1,292,152   | 766,096     |
| Colombia        | 0             | 0          | 0          | 8,831          | 154,578    | 187,973    | 0               | 0          | 0          | 8,831      | 154,578     | 187,973     |
| Ecuador         | 538,637       | 120,703    | 261,635    | 9,291,048      | 21,831,348 | 31,805,661 | 272,007         | 849,799    | 652,652    | 10,101,692 | 22,801,850  | 32,719,948  |
| Thailand        | 60,047        | 30,759     | 112,276    | 0              | 0          | 10,940     | 552,560         | 858,058    | 818,293    | 612,607    | 888,817     | 941,509     |
| Indonesia       | 0             | 7,349      | 70,350     | 0              | 0          | 0          | 5,551,407       | 6,183,550  | 10,846,191 | 5,551,407  | 6,190,899   | 10,916,541  |
| China           | 6,342,190     | 13,654,567 | 10,496,763 | 55,590         | 287,410    | 617,305    | 3,026,096       | 7,090,948  | 8,596,944  | 9,423,876  | 21,032,925  | 19,711,012  |
| Taiwan          | 26,808,791    | 19,570,564 | 27,020,328 | 437,747        | 325,537    | 225,560    | 12,324,971      | 7,794,830  | 7,213,755  | 39,571,509 | 27,690,931  | 34,459,643  |
| Other           | 117,190       | 275,459    | 91,137     | 231,349        | 1,152,333  | 2,203,592  | 198,082         | 356,362    | 578,407    | 546,621    | 1,784,154   | 2,873,136   |
| Total           | 33,866,855    | 33,700,704 | 38,052,489 | 25,841,254     | 44,454,843 | 60,839,057 | 22,188,860      | 23,222,306 | 28,904,994 | 81,896,969 | 101,377,853 | 127,796,540 |

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

Table 10: Quantity and value of U.S. Atlantic salmon imports by country, in pounds

| Country         | Fresh              |                    |                    | Frozen            |                   |                   | Fillets 1/         |                    |                    | Total              |                    |                    |
|-----------------|--------------------|--------------------|--------------------|-------------------|-------------------|-------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
|                 | 1999               | 2000               | 2001               | 1999              | 2000              | 2001              | 1999               | 2000               | 2001               | 1999               | 2000               | 2001               |
| <b>Quantity</b> |                    |                    |                    |                   |                   |                   |                    |                    |                    |                    |                    |                    |
| Canada          | 85,931,490         | 89,325,529         | 96,978,866         | 13,234            | 45,459            | 45,122            | 12,203,133         | 17,391,424         | 27,979,835         | 98,147,857         | 106,762,411        | 125,003,823        |
| Chile           | 6,363,208          | 8,923,059          | 7,461,250          | 1,776,356         | 2,970,851         | 1,872,129         | 84,200,352         | 127,397,970        | 160,684,434        | 92,339,916         | 139,291,879        | 170,017,813        |
| Iceland         | 7,151,972          | 2,845,495          | 1,534,415          | 0                 | 0                 | 166,401           | 874,613            | 160,274            | 218,088            | 8,026,585          | 3,005,769          | 1,918,904          |
| Norway          | 979,857            | 650,670            | 849,693            | 4,932,949         | 6,423,479         | 4,497,153         | 14,912,320         | 11,209,075         | 8,493,724          | 20,825,126         | 18,283,224         | 13,840,569         |
| Faroe Islands   | 2,136,390          | 5,240,429          | 1,403,931          | 1,541,181         | 360,948           | 267,899           | 164,190            | 329,081            | 125,537            | 3,841,760          | 5,930,458          | 1,797,366          |
| United Kingdom  | 11,763,419         | 12,054,451         | 11,618,712         | 82,864            | 57,593            | 111,670           | 4,850,717          | 2,562,563          | 772,864            | 16,697,001         | 14,674,607         | 12,503,246         |
| Other           | 289,080            | 323,179            | 61,804             | 1,345,216         | 785,065           | 692,791           | 657,209            | 249,971            | 89,917             | 2,291,505          | 1,358,214          | 844,512            |
| <b>Total</b>    | <b>114,615,415</b> | <b>119,362,811</b> | <b>119,908,670</b> | <b>9,691,801</b>  | <b>10,643,394</b> | <b>7,653,163</b>  | <b>117,862,535</b> | <b>159,300,357</b> | <b>198,364,399</b> | <b>242,169,750</b> | <b>289,306,563</b> | <b>325,926,232</b> |
| <b>Value</b>    |                    |                    |                    |                   |                   |                   |                    |                    |                    |                    |                    |                    |
| Canada          | 221,139,393        | 219,321,871        | 226,890,709        | 81,479            | 71,362            | 82,600            | 46,272,636         | 64,057,623         | 92,450,630         | 267,493,508        | 283,450,856        | 319,423,939        |
| Chile           | 12,869,576         | 17,088,534         | 11,116,881         | 4,450,614         | 7,265,531         | 3,100,351         | 224,719,311        | 332,854,757        | 321,439,053        | 242,039,501        | 357,208,822        | 335,656,285        |
| Iceland         | 12,445,344         | 5,661,438          | 2,155,403          | 0                 | 0                 | 1,027,163         | 2,023,767          | 588,370            | 639,425            | 14,469,111         | 6,249,808          | 3,821,991          |
| Norway          | 1,808,768          | 1,225,479          | 1,534,409          | 9,185,791         | 12,916,553        | 7,767,558         | 45,452,333         | 37,114,524         | 24,968,422         | 56,446,892         | 51,256,556         | 34,270,389         |
| Faroe Islands   | 3,637,128          | 9,721,636          | 1,582,075          | 2,571,301         | 695,389           | 413,491           | 576,067            | 933,317            | 251,542            | 6,784,496          | 11,350,342         | 2,247,108          |
| United Kingdom  | 23,471,879         | 22,047,035         | 14,173,048         | 141,626           | 67,896            | 303,334           | 13,040,236         | 6,941,893          | 1,226,773          | 36,653,741         | 29,056,824         | 15,703,155         |
| Other           | 595,891            | 623,205            | 113,975            | 2,722,994         | 1,569,830         | 1,325,318         | 1,654,398          | 616,660            | 399,505            | 4,973,283          | 2,809,695          | 1,838,798          |
| <b>Total</b>    | <b>275,967,979</b> | <b>275,689,198</b> | <b>257,566,500</b> | <b>19,153,805</b> | <b>22,586,561</b> | <b>14,019,815</b> | <b>333,738,748</b> | <b>443,107,144</b> | <b>441,375,350</b> | <b>628,860,532</b> | <b>741,382,903</b> | <b>712,961,665</b> |

1/ Includes both fresh and frozen fillets.

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

Table 11: Quantity and value of U.S. shrimp imports by country, in 1,000 pounds

| Country         | Frozen           |                  |                  | Fresh         |               |               | Other          |                |                | Total            |                  |                  |
|-----------------|------------------|------------------|------------------|---------------|---------------|---------------|----------------|----------------|----------------|------------------|------------------|------------------|
|                 | 1999             | 2000             | 2001             | 1999          | 2000          | 2001          | 1999           | 2000           | 2001           | 1999             | 2000             | 2001             |
| <b>Quantity</b> |                  |                  |                  |               |               |               |                |                |                |                  |                  |                  |
| Mexico          | 76,632           | 63,752           | 65,654           | 606           | 302           | 454           | 24             | 44             | 67             | 77,263           | 64,097           | 66,175           |
| Ecuador         | 110,956          | 40,939           | 56,518           | 0             | 0             | 2             | 185            | 1,162          | 2,474          | 111,141          | 42,101           | 58,994           |
| India           | 43,039           | 56,739           | 63,589           | 207           | 374           | 665           | 4,863          | 5,443          | 8,232          | 48,109           | 62,556           | 72,486           |
| Bangladesh      | 19,224           | 22,520           | 19,238           | 0             | 4             | 0             | 66             | 12             | 0              | 19,291           | 22,536           | 19,238           |
| Thailand        | 164,870          | 178,089          | 186,460          | 412           | 373           | 208           | 87,151         | 100,305        | 113,330        | 252,433          | 278,767          | 299,998          |
| Indonesia       | 33,636           | 34,240           | 32,202           | 17            | 222           | 73            | 1,682          | 2,480          | 2,662          | 35,336           | 36,942           | 34,938           |
| Philippines     | 2,874            | 3,436            | 2,961            | 29            | 3             | 1             | 712            | 688            | 913            | 3,614            | 4,126            | 3,876            |
| China           | 17,974           | 38,373           | 56,726           | 604           | 931           | 884           | 924            | 827            | 4,157          | 19,502           | 40,130           | 61,767           |
| Others          | 147,884          | 183,143          | 231,358          | 1,474         | 1,061         | 1,102         | 15,234         | 25,297         | 32,651         | 164,592          | 209,501          | 265,112          |
| <b>Total</b>    | <b>617,089</b>   | <b>621,231</b>   | <b>714,706</b>   | <b>3,349</b>  | <b>3,269</b>  | <b>3,389</b>  | <b>110,842</b> | <b>136,256</b> | <b>164,488</b> | <b>731,280</b>   | <b>760,756</b>   | <b>882,583</b>   |
| <b>Value</b>    |                  |                  |                  |               |               |               |                |                |                |                  |                  |                  |
| Mexico          | 383,689          | 401,867          | 379,714          | 2,265         | 1,044         | 862           | 150            | 104            | 385            | 386,104          | 403,014          | 380,961          |
| Ecuador         | 402,342          | 186,348          | 214,966          | 0             | 0             | 12            | 589            | 4,044          | 9,310          | 402,932          | 190,393          | 224,288          |
| India           | 148,230          | 222,211          | 243,417          | 2,285         | 4,573         | 7,577         | 10,242         | 12,797         | 13,756         | 160,758          | 239,582          | 264,750          |
| Bangladesh      | 111,927          | 145,211          | 92,244           | 0             | 5             | 0             | 301            | 92             | 0              | 112,228          | 145,307          | 92,244           |
| Thailand        | 768,197          | 944,880          | 799,810          | 4,323         | 3,415         | 791           | 424,453        | 550,058        | 465,455        | 1,196,972        | 1,498,353        | 1,266,056        |
| Indonesia       | 159,062          | 179,258          | 143,650          | 120           | 630           | 459           | 8,146          | 10,839         | 11,417         | 167,327          | 190,727          | 155,525          |
| Philippines     | 16,599           | 22,286           | 16,506           | 17            | 12            | 6             | 719            | 593            | 840            | 17,335           | 22,891           | 17,352           |
| China           | 45,123           | 127,837          | 171,102          | 3,250         | 6,974         | 7,708         | 899            | 1,641          | 12,783         | 49,272           | 136,451          | 191,593          |
| Others          | 577,642          | 819,865          | 896,534          | 3,367         | 3,086         | 4,106         | 64,510         | 107,658        | 133,388        | 645,519          | 930,609          | 1,034,028        |
| <b>Total</b>    | <b>2,612,811</b> | <b>3,049,763</b> | <b>2,957,944</b> | <b>15,627</b> | <b>19,738</b> | <b>21,520</b> | <b>510,008</b> | <b>687,827</b> | <b>647,333</b> | <b>3,138,447</b> | <b>3,757,328</b> | <b>3,626,797</b> |

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