

A Presentation on Selected Trends in Shrimp Harvesting, Processing, and Imports

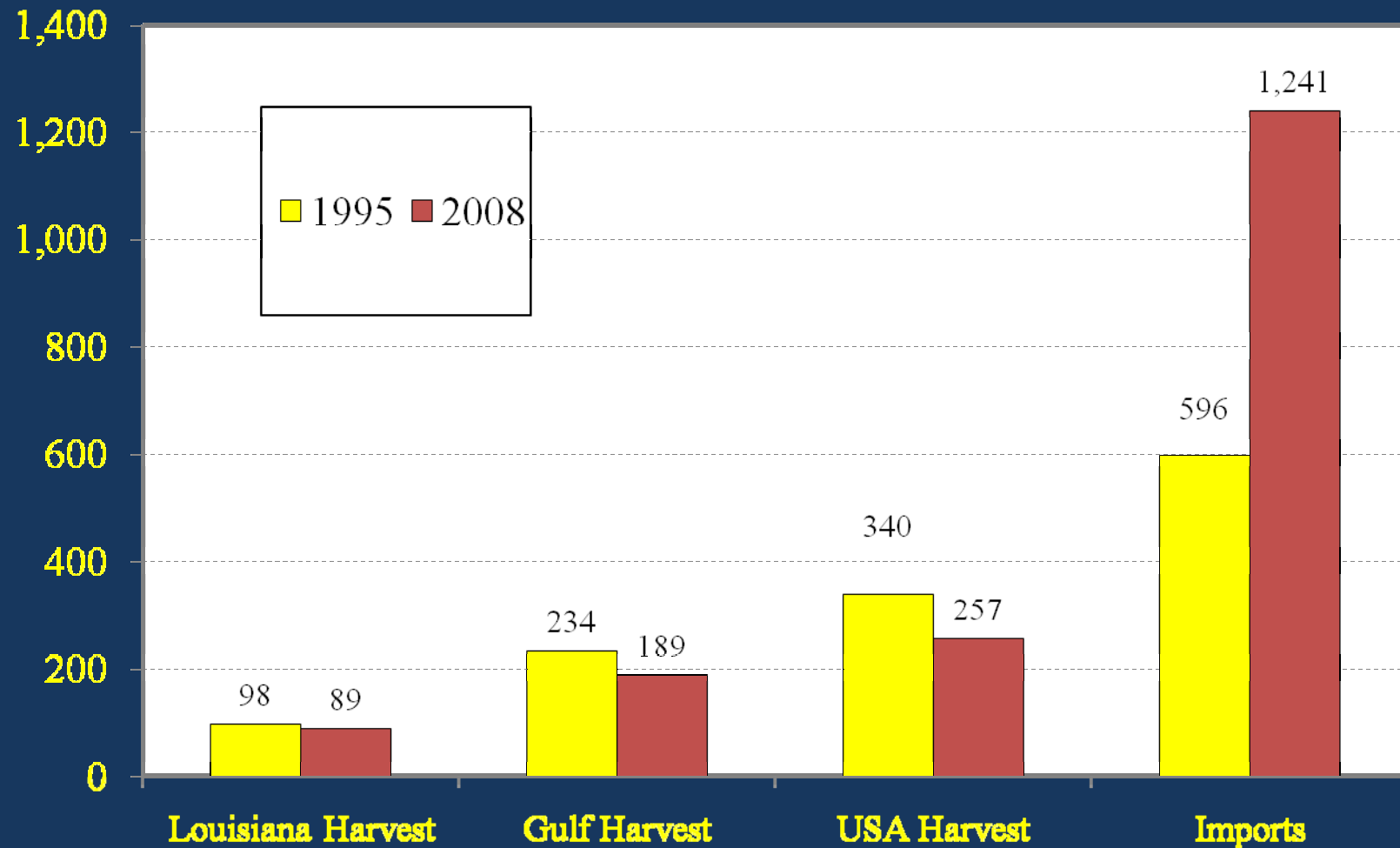
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Socioeconomic Research and Development Section

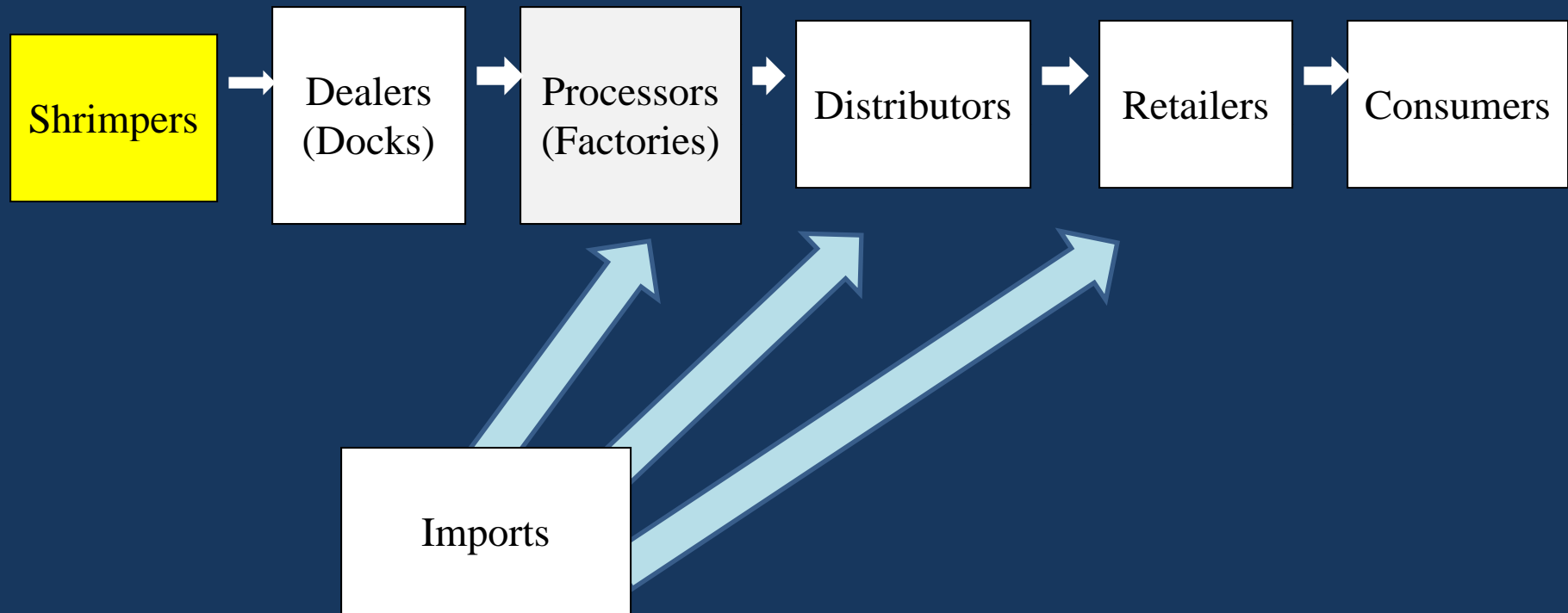
September 16, 2009

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Shrimp Landings and Imports, 1995 & 2008: Millions of Pounds

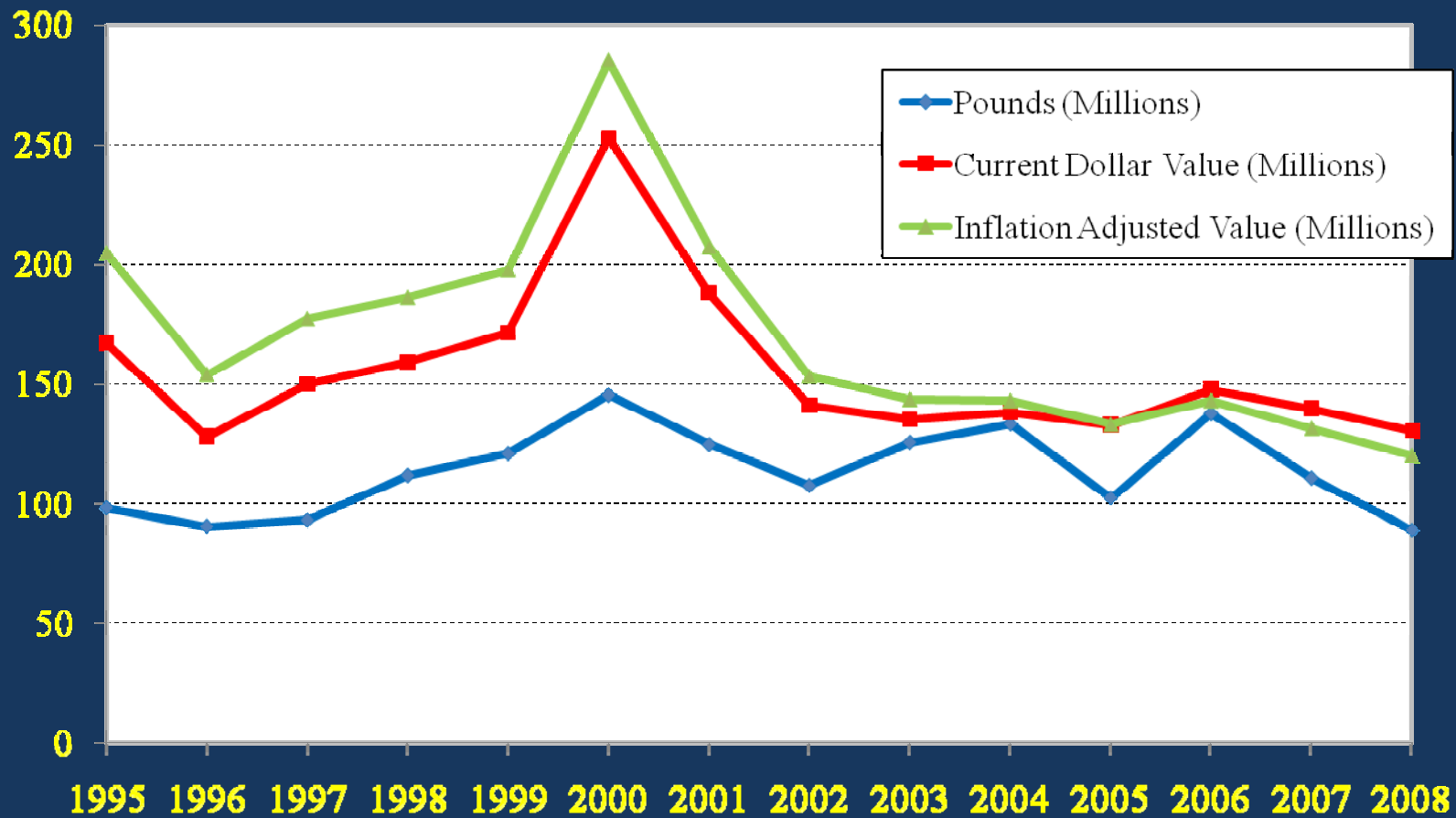


Shrimp Harvest Data (Dockside)



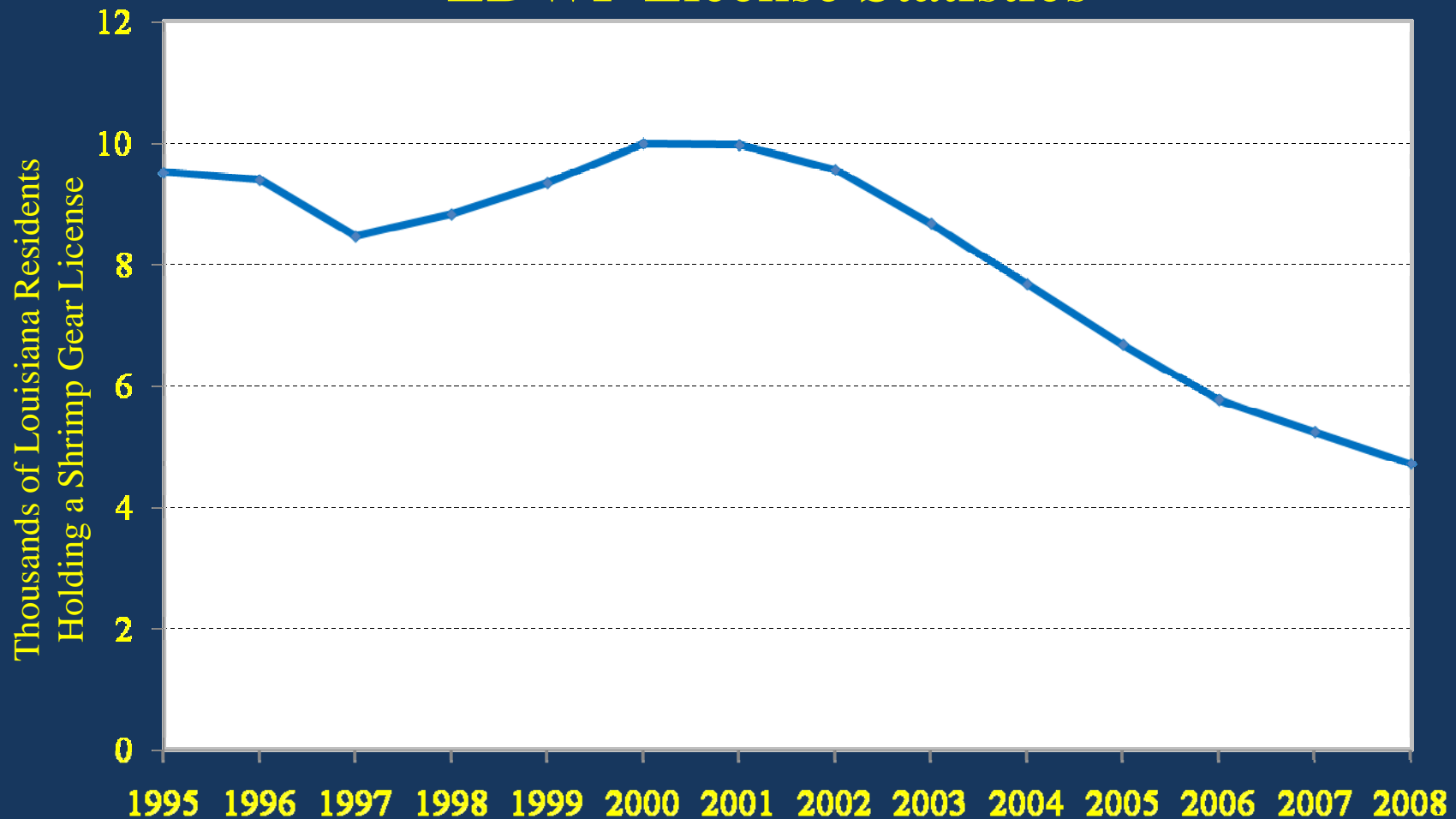
Simplified Shrimp Marketing Chain

Louisiana Harvest and Value: 1995 – 2008 NMFS Data



Number of Louisiana Shrimpers: 1995 – 2008

LDWF License Statistics

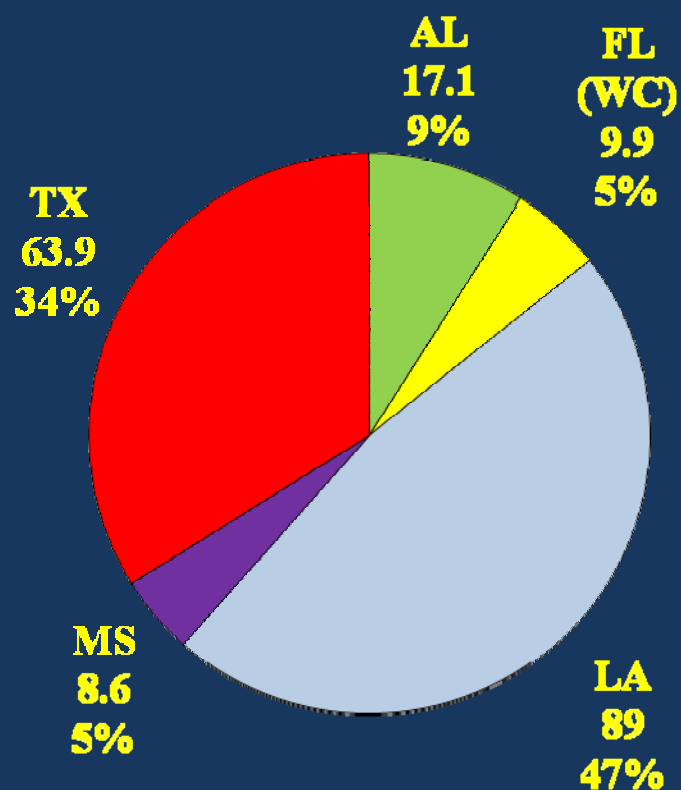


1989: 16,505

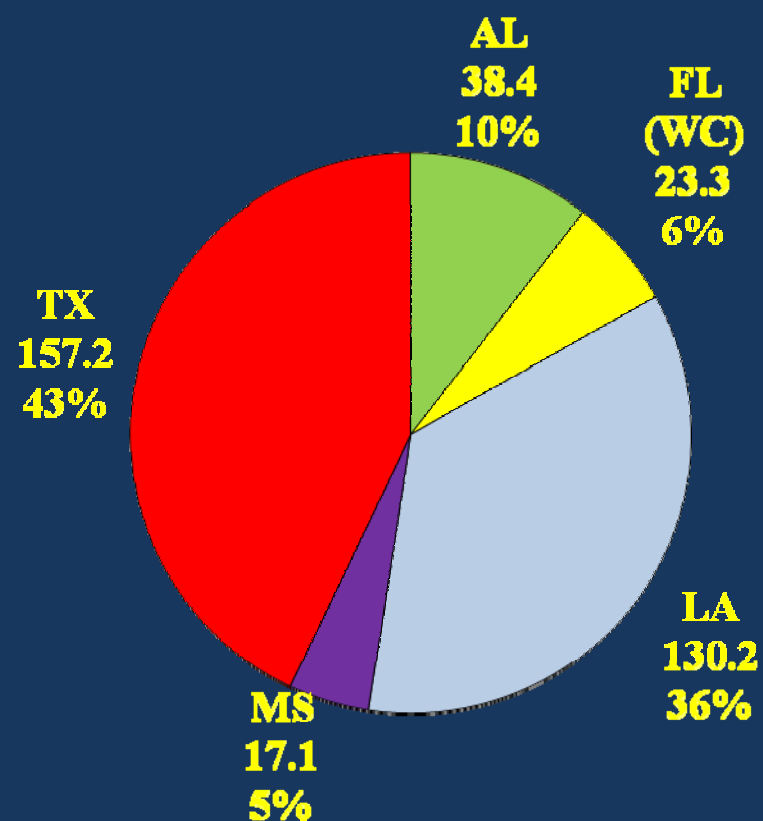
Shrimp Harvests in the Gulf, By State: 2008

(NMFS Data)

Millions of Pounds

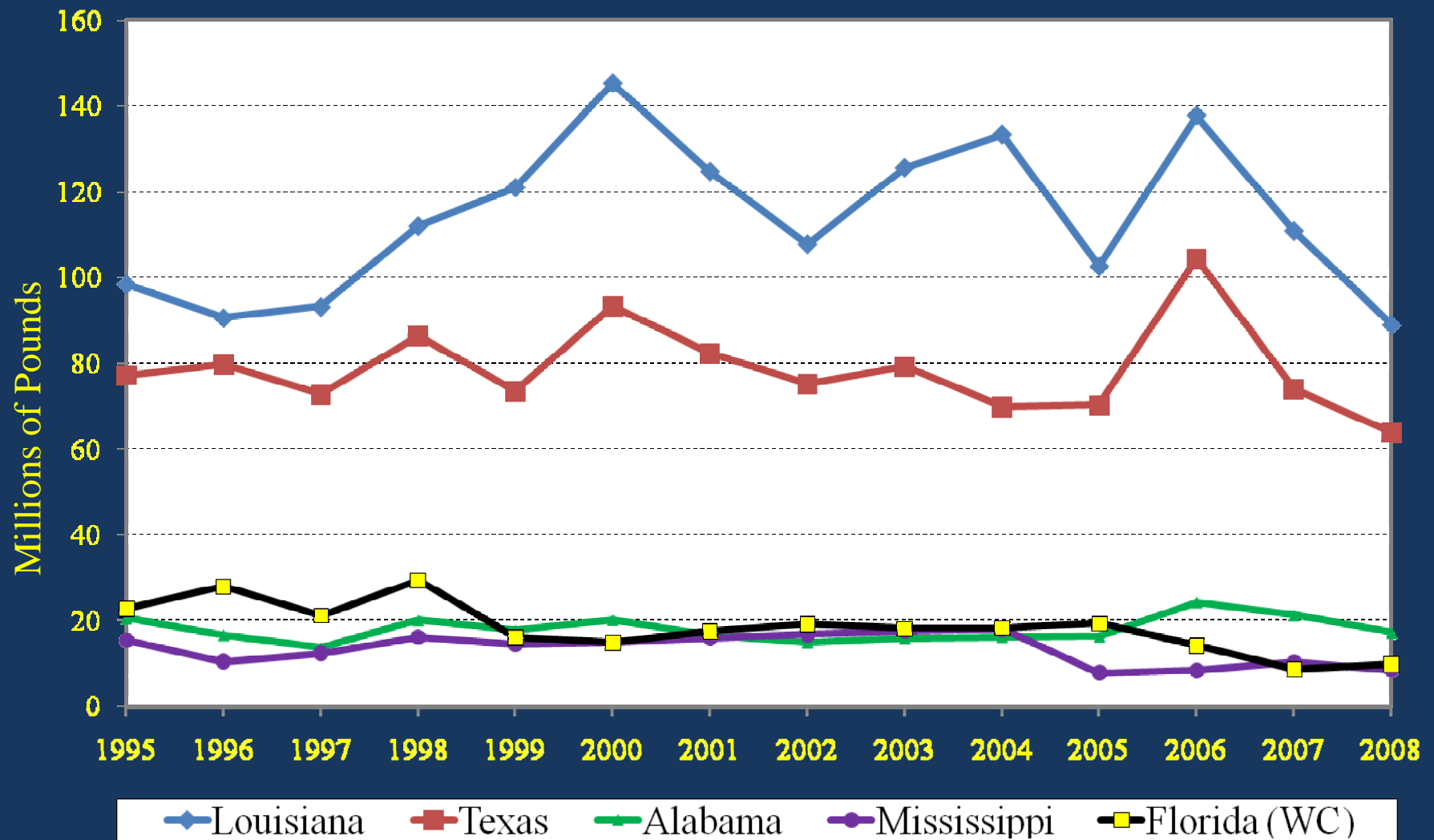


Millions of Current Dollars

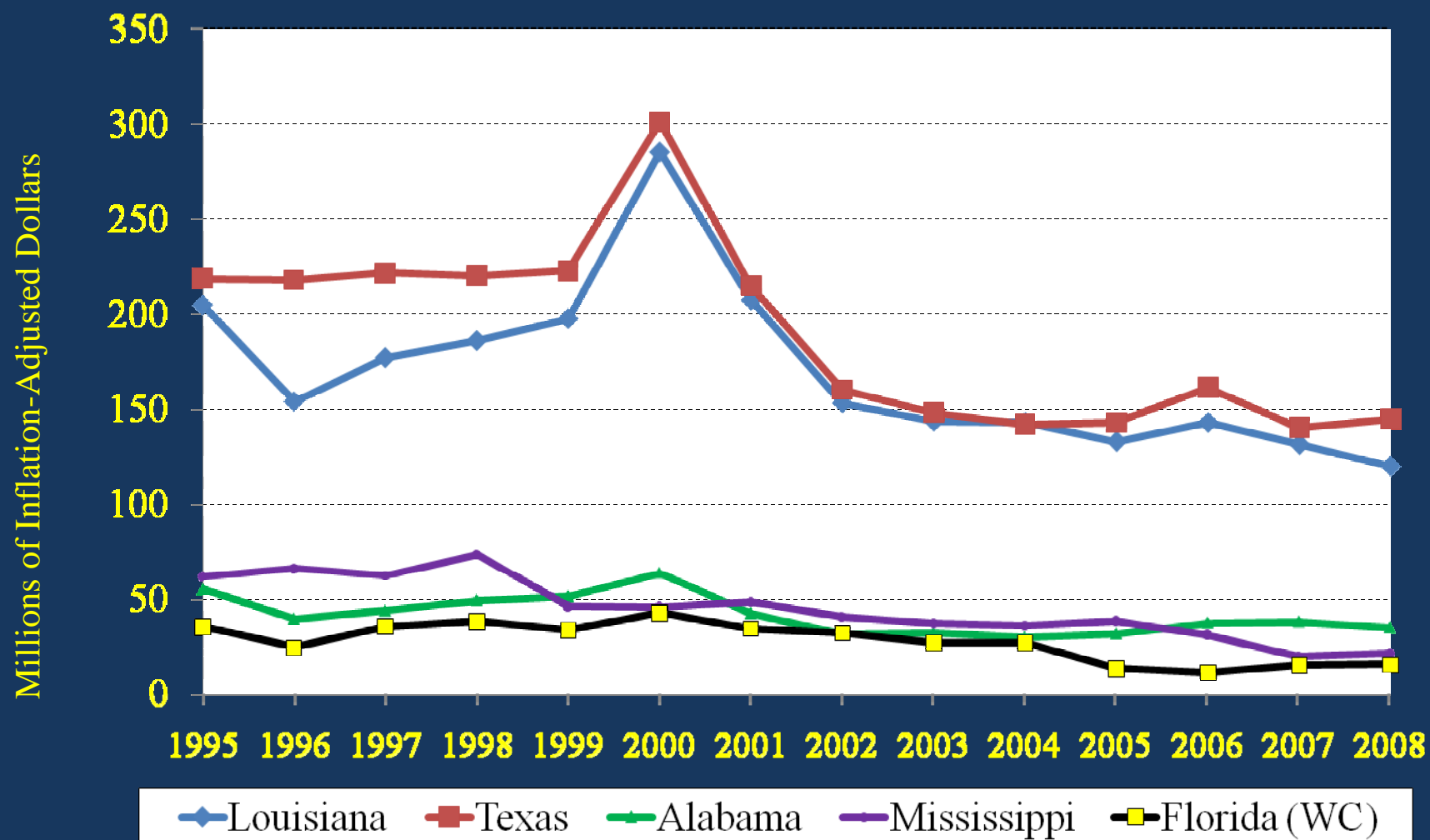


Gulf Harvest by State: 1995 – 2008

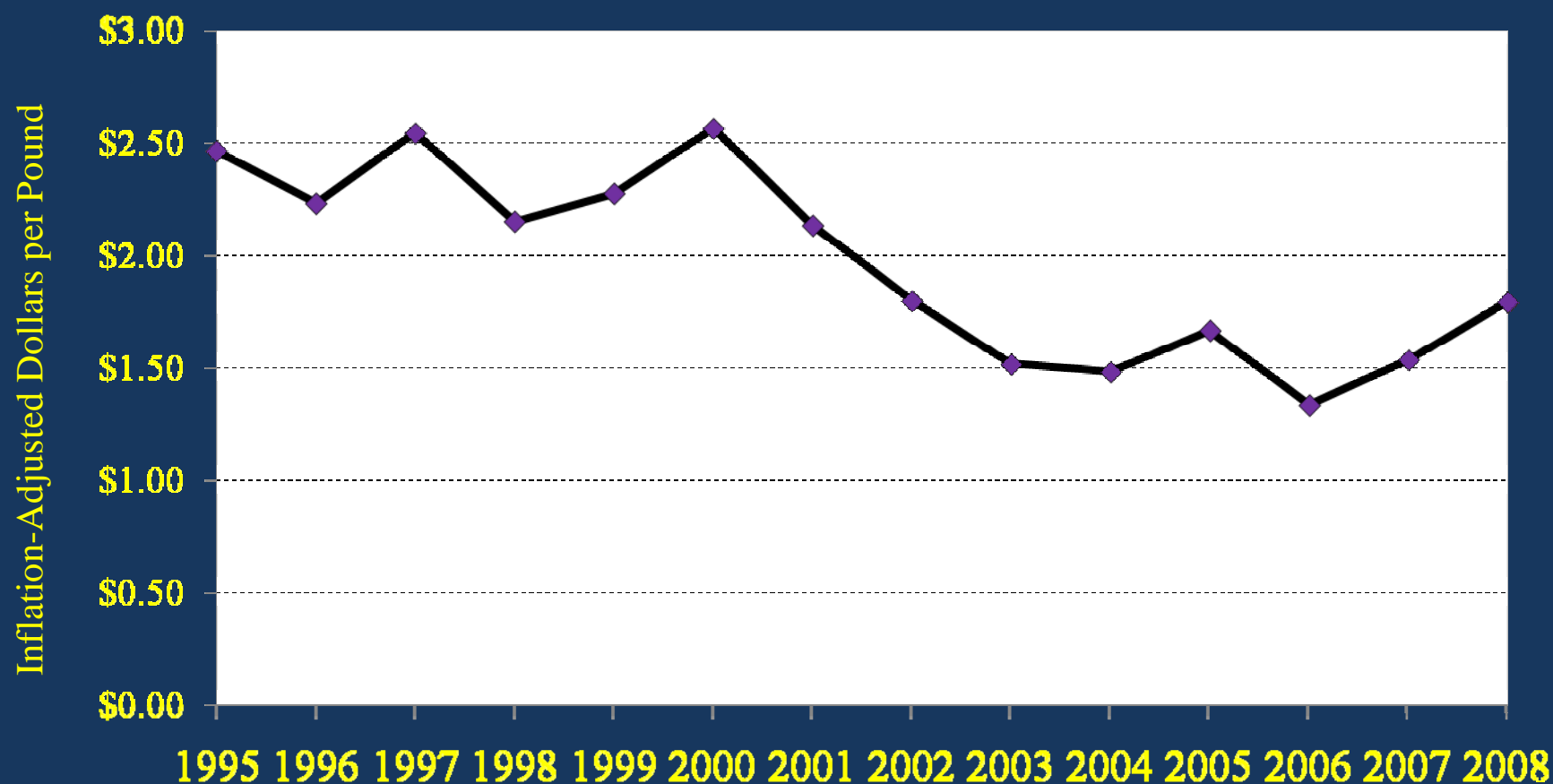
NMFS Data



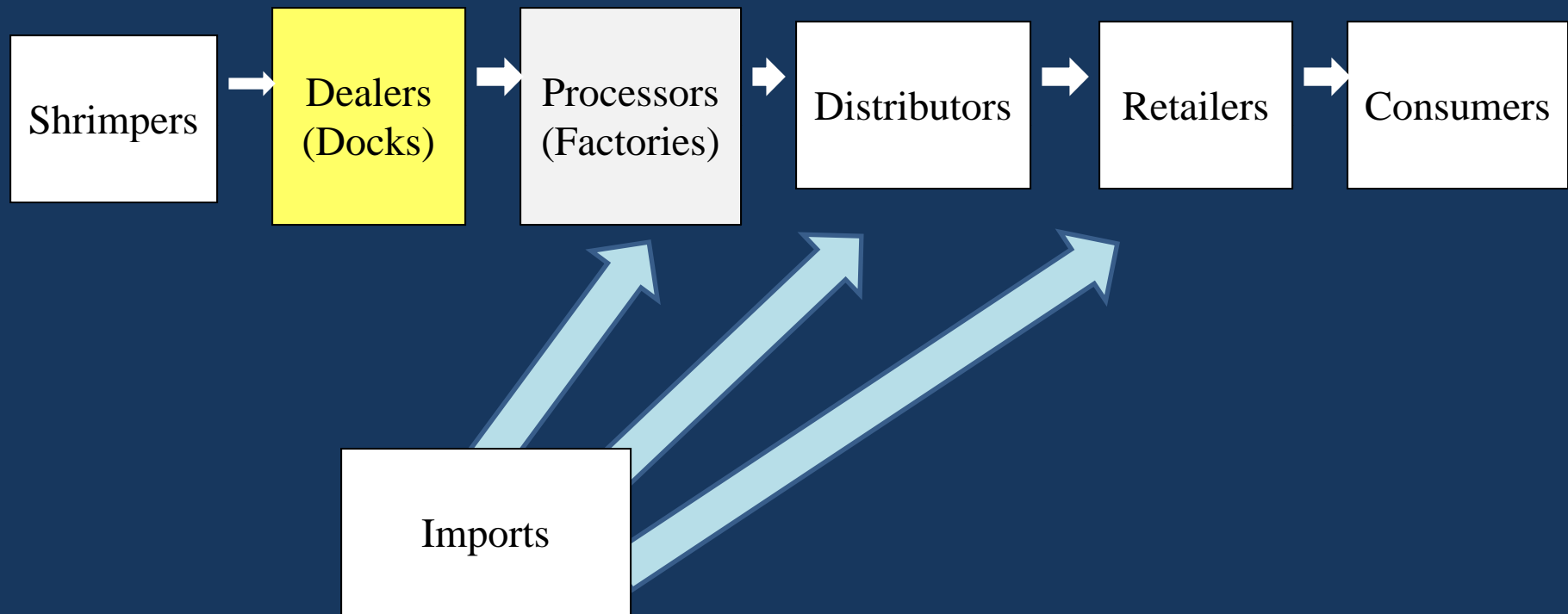
Gulf Inflation-Adjusted Value by State: 1995 – 2008 NMFS Data



Inflation-Adjusted Value per Pound of Shrimp, Gulf of Mexico: 1995 – 2008 NMFS Data

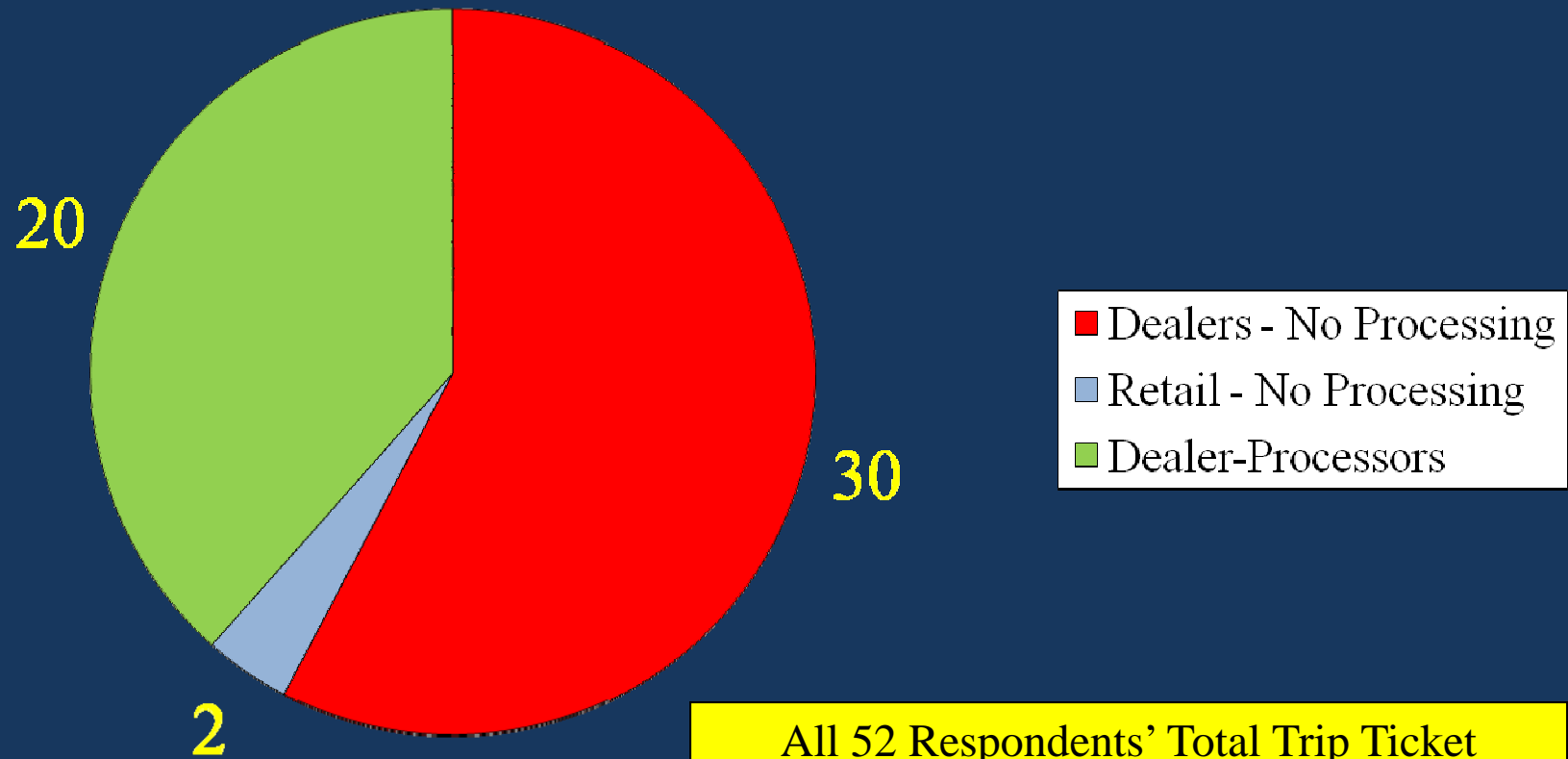


Shrimp Dealer Data



Simplified Shrimp Marketing Chain

Number of Respondents in the LDWF 2007 Shrimp Dealers Survey, By Category



All 52 Respondents' Total Trip Ticket Purchases = 114.33 Million Pounds
(82.4 % of all Louisiana Landings in 2006)

Summary Results from All 52 Respondents to LDWF 2007 Shrimp Marketing Survey

- Estimate of Shrimp that Came from Louisiana Sources = 90.41%
 - Estimated Shrimp Purchases That Came from Foreign Sources = 0.01%
- Estimated Shrimp Sales Sold to Entities Inside Louisiana = 67.22%

NOTE: These represent *rough* estimates.

Findings from the 30 Dealers Who Reported No Processing

- Estimate of Shrimp Purchased by “Dealers – No Processing” that Came from Louisiana Sources – 86.2%
 - Estimate from Foreign Sources = 0.00%
- Estimated Shrimp “Dealers – No Processing” Sold to Entities Inside Louisiana = 78.9%

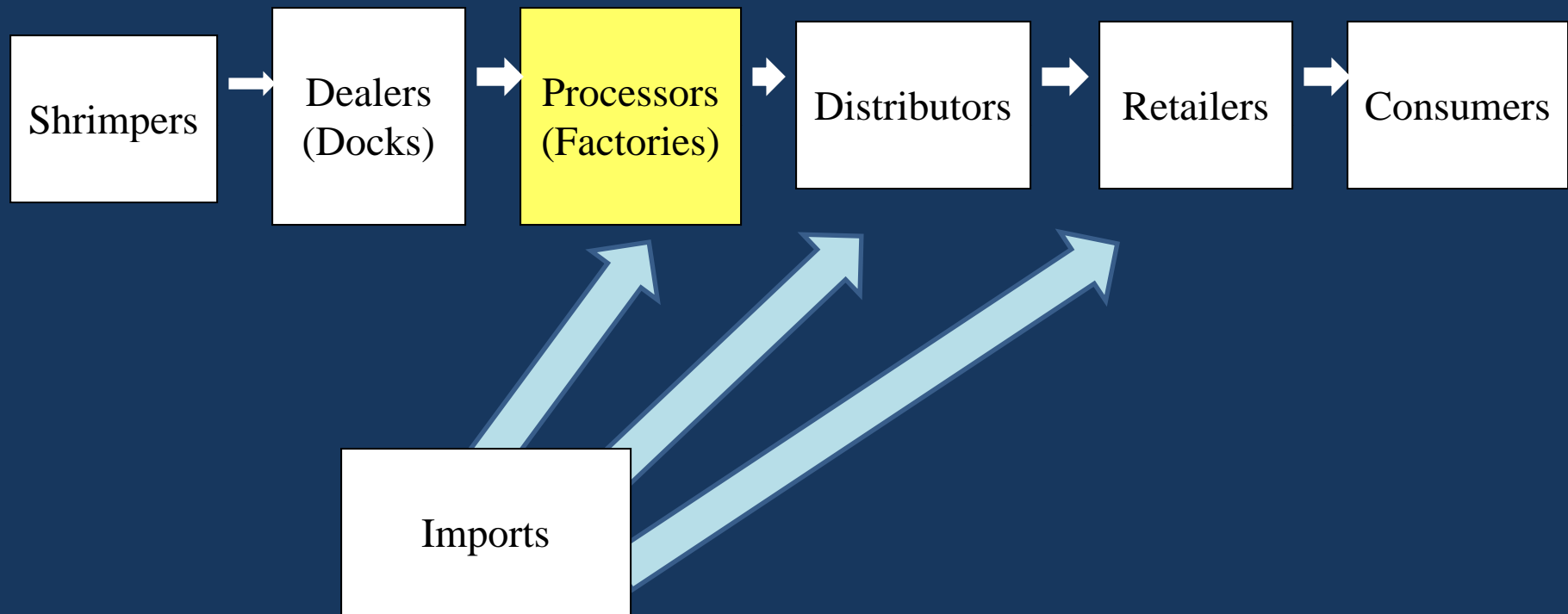
NOTE: These represent *rough* estimates.

Summary Results from the 20 Respondents Who Reported Some Processing “Dealer-Processors”

- Estimate of Shrimp Purchased by Dealer-Processors that Came from Louisiana Sources
 - 98.6%
 - Estimated Shrimp from Foreign Sources = 0.027%
- Estimated Shrimp Dealer-Processors Sold to Entities Inside Louisiana = 47.3%

NOTE: These represent *rough* estimates.

Shrimp Processor Data



Simplified Shrimp Marketing Chain

NMFS Processors Survey: Louisiana, 2006

<u>Form</u>	<u>Number</u>	<u>Millions of Pounds</u>	<u>Millions of Dollars</u>	<u>Dollars/Pound</u>
All Shrimp	18	53.71	\$162.55	\$3.03
Headless	14	14.83	\$58.34	\$3.93
Peeled Shrimp Meat	11	38.38	\$100.0	\$2.60
Shrimp Meal, Cooked Peeled Meat, Dried Shrimp	7	0.499	\$4.16	\$8.33

Twelve (12) of the 18 firms who participated in the 2006 NMFS Processors Survey also participated in the LDWF 2007 Shrimp Marketing Survey. These 12 accounted for 38.7% of the volume (pounds) and 30.6% of the value of the total shrimp processing reported on the NMFS Processors Survey.

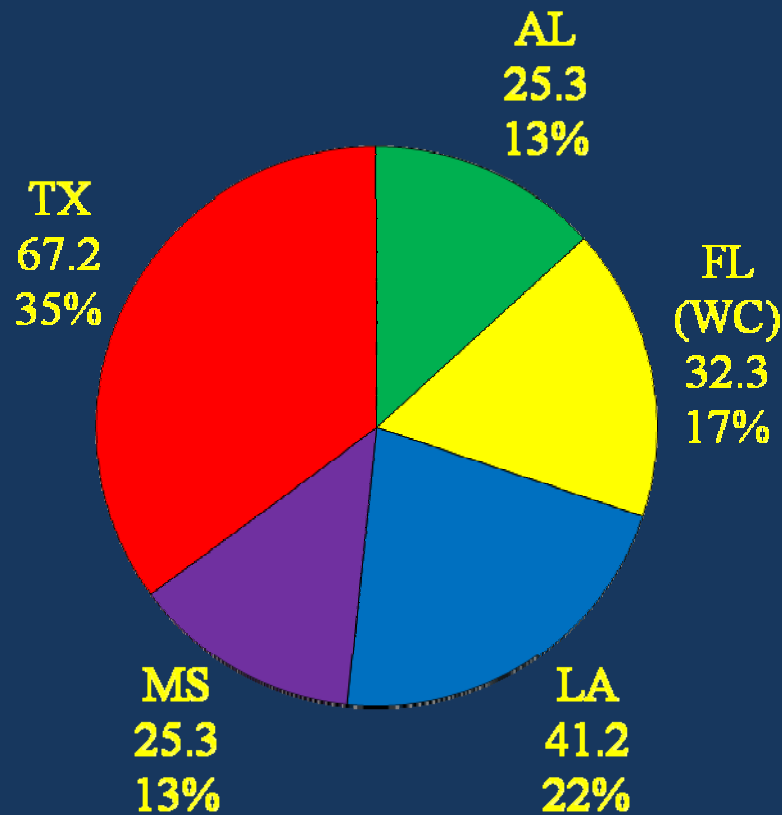
NMFS Processors Survey: Louisiana, 2007

<u>Form</u>	<u>Number</u>	<u>Millions of Pounds</u>	<u>Millions of Dollars</u>	<u>Dollars/Pound</u>
All Shrimp	17	41.20	\$102.69	\$2.49
Headless	13	9.96	\$36.1	\$3.62
Peeled Shrimp Meat	12	30.48	\$61.89	\$2.03
Dried Shrimp	6	0.341	\$3.36	\$9.85
Shrimp Meal; Peeled & Deveined; Breaded; Bait	4	0.413	\$1.34	\$3.26

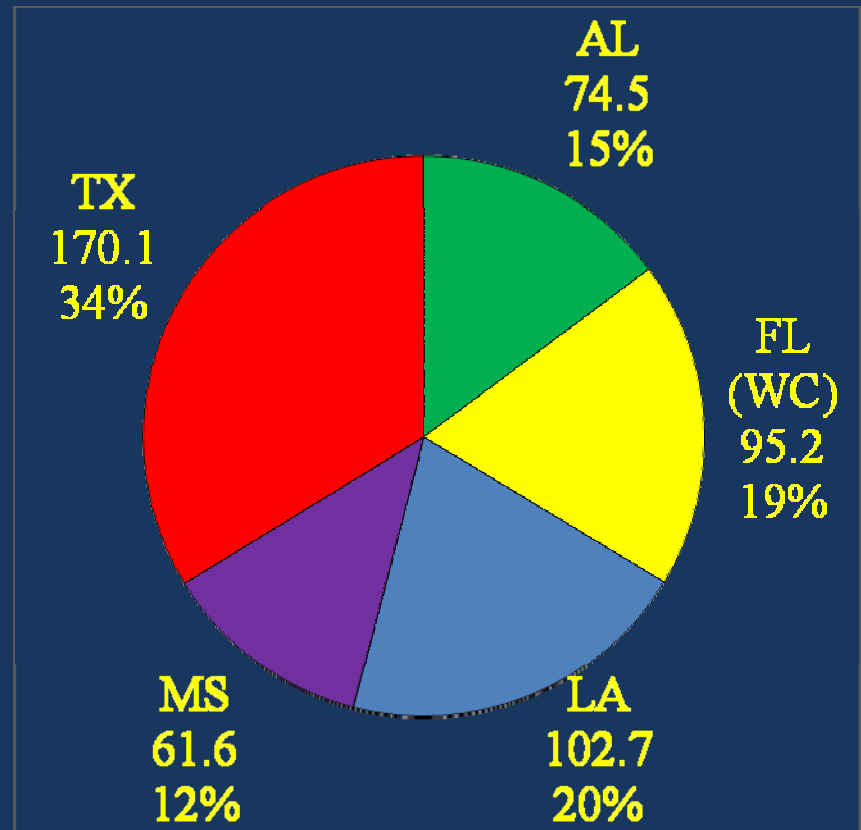
Shrimp Processing in the Gulf, By State: 2007

(NMFS Processors Survey)

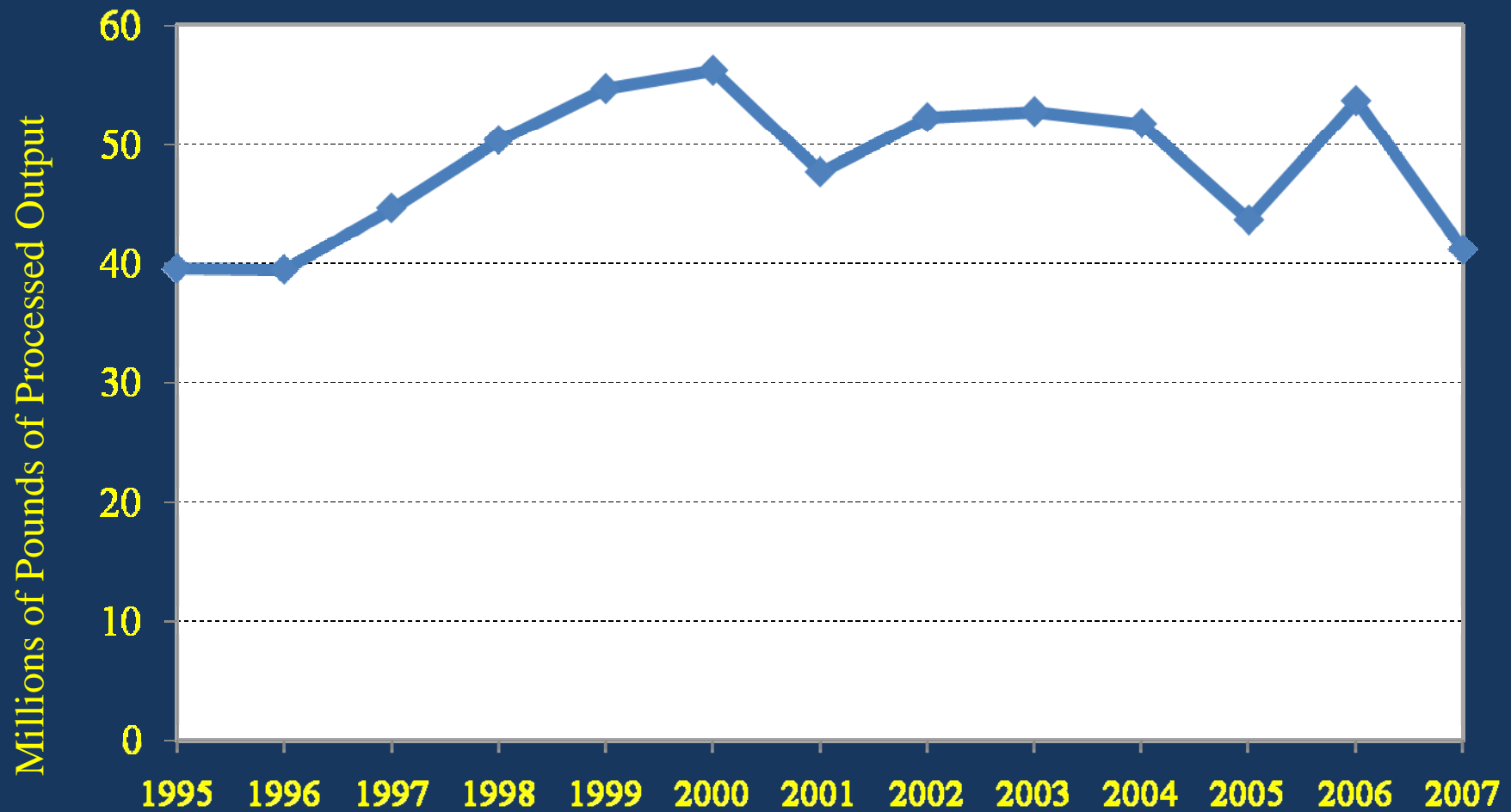
Millions of Pounds



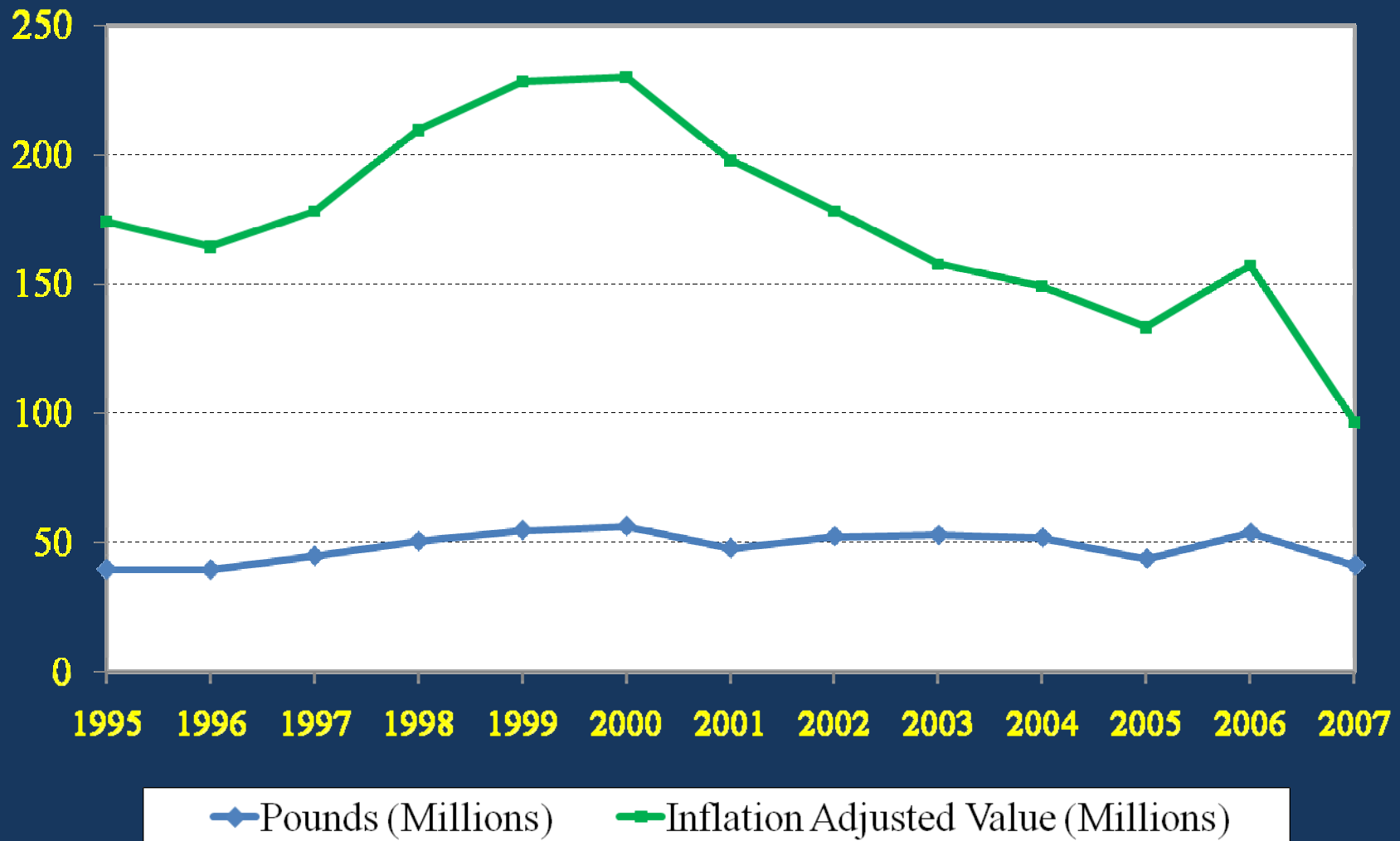
Millions of Current Dollars



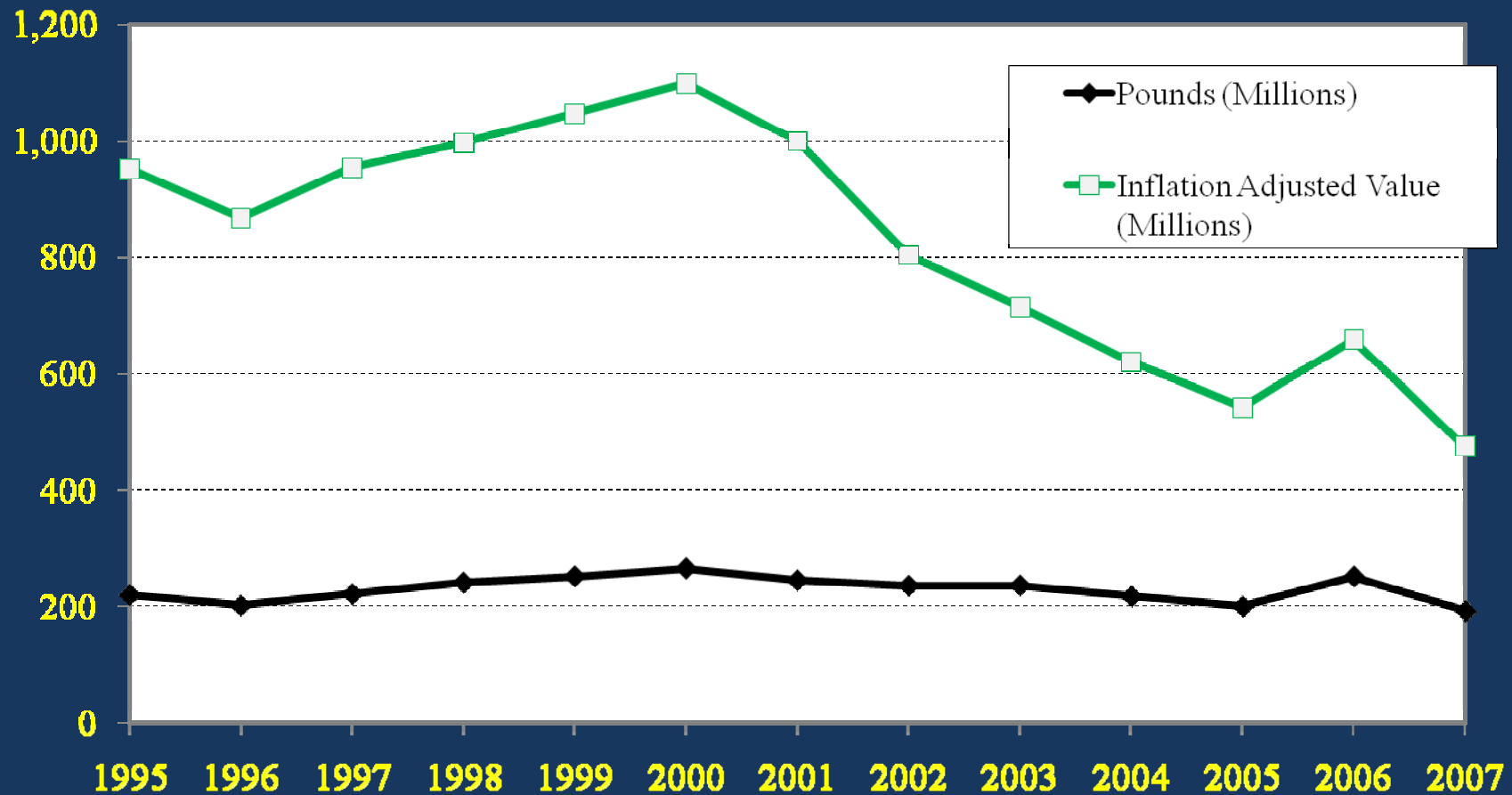
Louisiana Processing Volume: 1995 – 2007 (NMFS Processors Survey)



Louisiana Processing Volume & Value: 1995 – 2007 (NMFS Processors Survey)

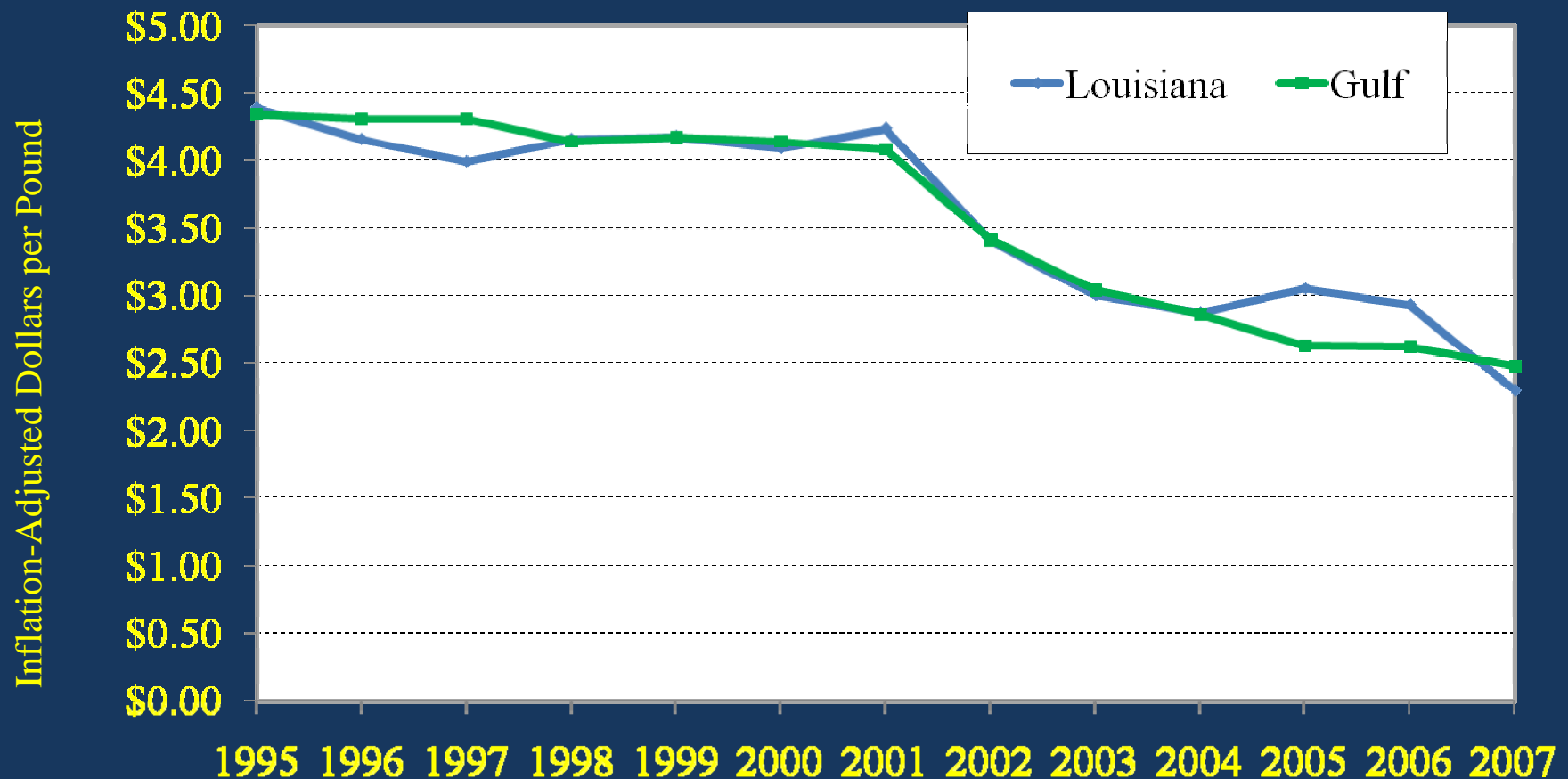


Gulf-Wide Processing Volume & Value: 1995 – 2007 (NMFS Processors Survey)



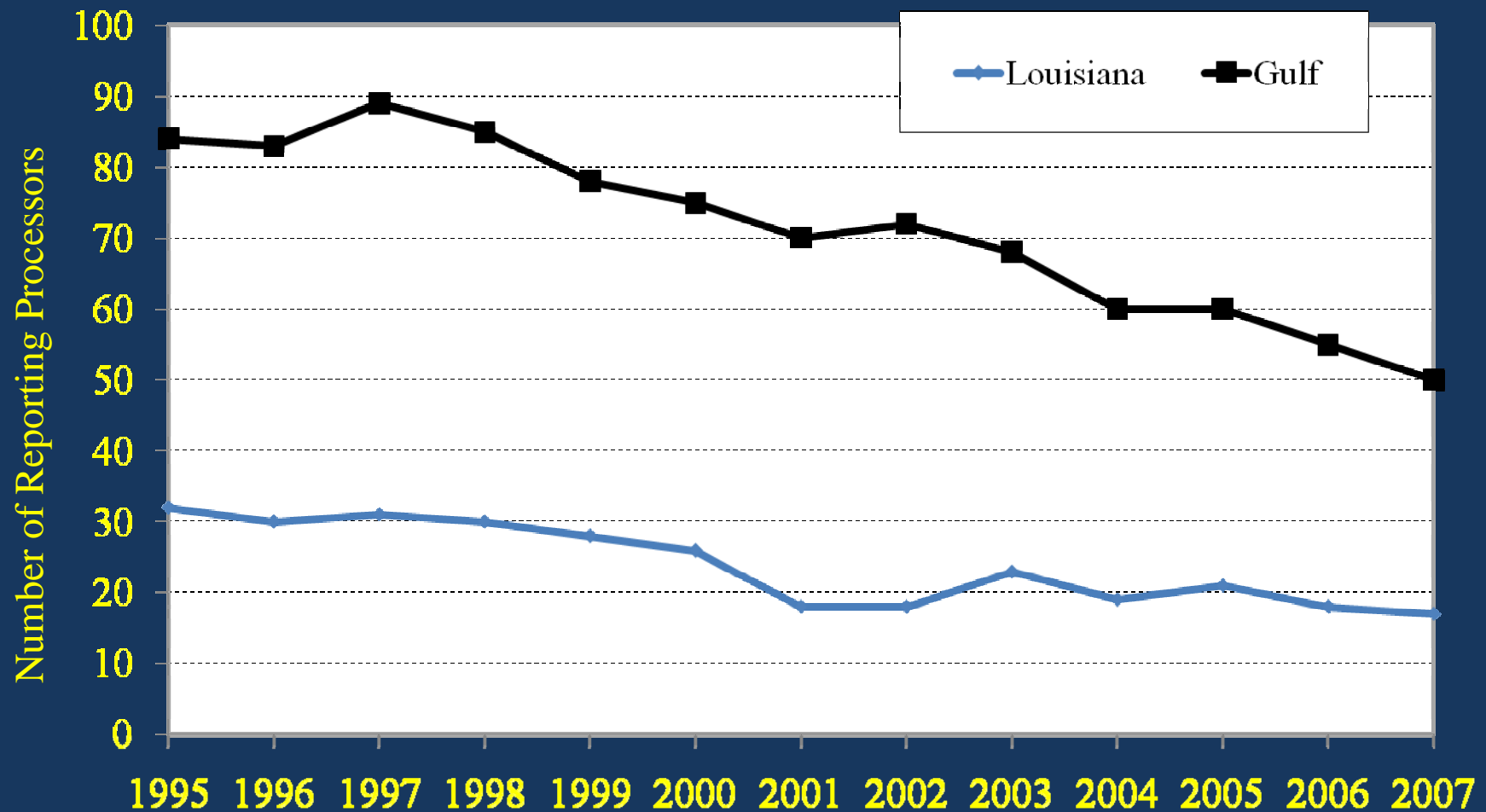
Price per Pound of Processed Shrimp Product: 1995 – 2007

NMFS Processors Survey



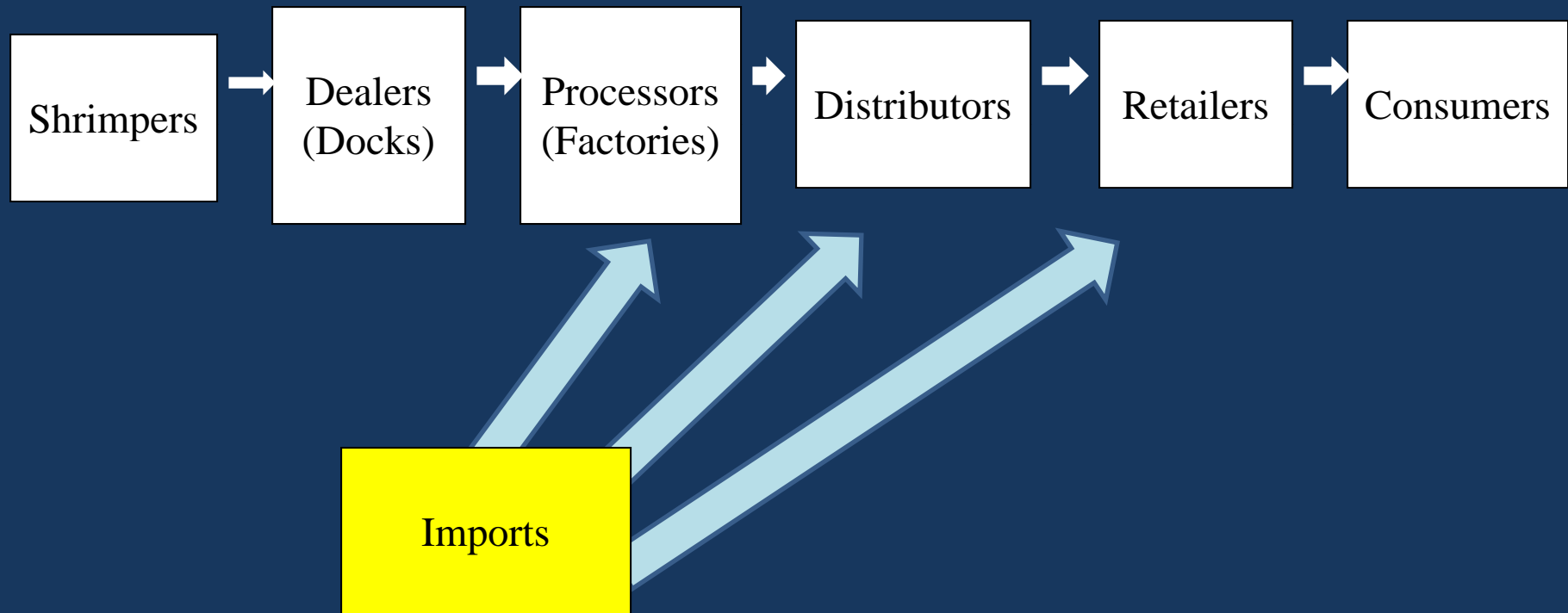
NOTE: The “price per processed pound of shrimp product” statistic is based on a combination of dissimilar products.

Number of Shrimp Processors in NMFS Processors Survey: 1995 – 2007



Shrimp Import Data

U.S. 2008 Imports – 1.24 Billion Pounds - \$4.09 Billion



Simplified Shrimp Marketing Chain

Where U.S. Imports Come From

Top Ten Importers, 2008

(NMFS Fisheries Statistics Division)

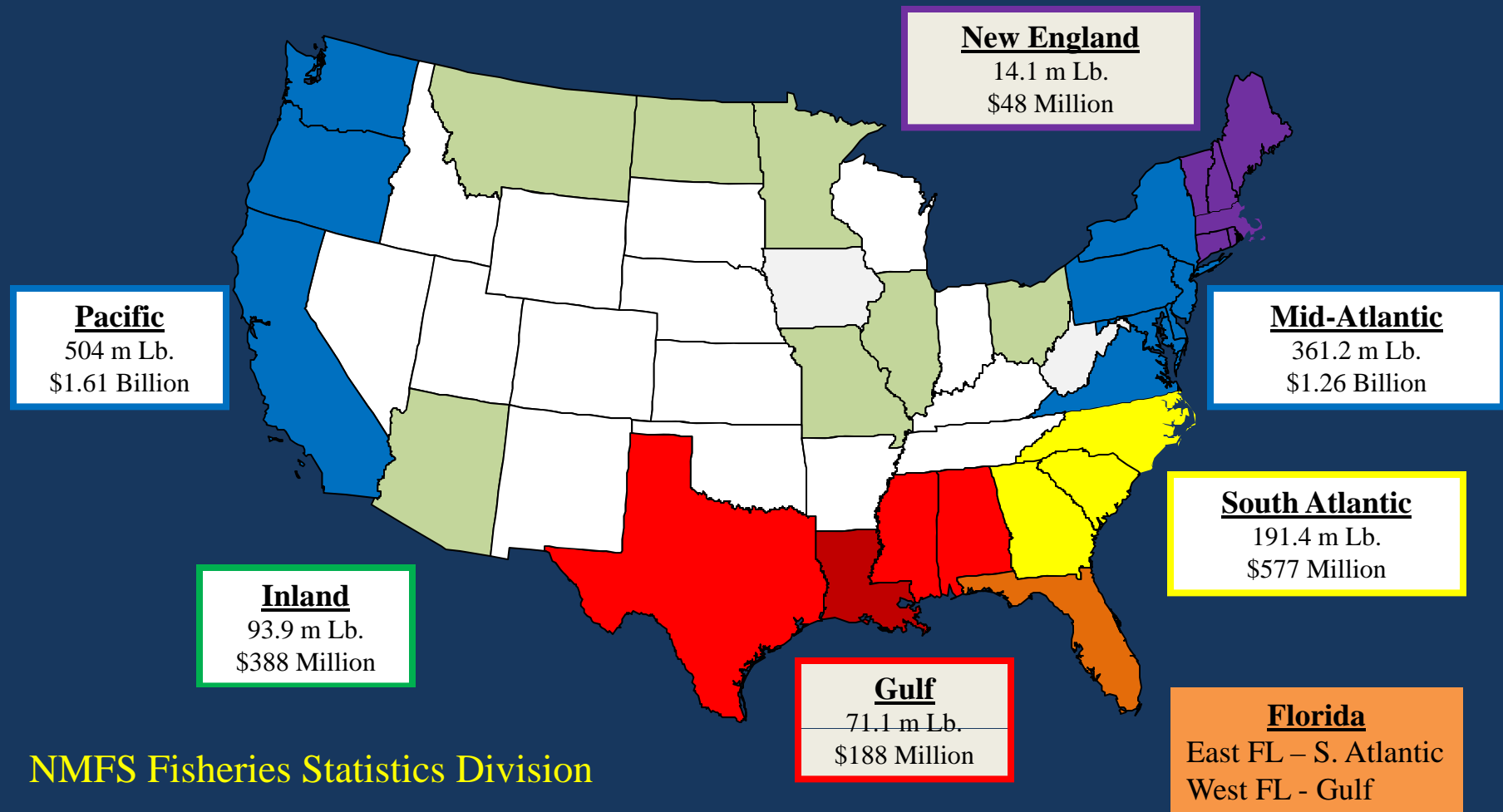
<u>2003</u>		<u>2005</u>		<u>2008</u>	
<u>Nation</u>	<u>Imports</u> (Million Lb.)	<u>Nation</u>	<u>Imports</u> (Million Lb.)	<u>Nation</u>	<u>Imports</u> (Million Lb.)
Thailand*	293.3	Thailand*	354.2	Thailand*	403.5
China*	179.5	Indonesia	115.7	Indonesia	184.8
Vietnam*	126.3	Ecuador*	109.1	Ecuador*	123.9
India*	100.1	China*	101.4	China*	107.8
Ecuador*	74.8	Vietnam*	94.5	Vietnam*	106.26
Mexico	56.1	India*	78.8	Mexico	75.9
Brazil*	48.0	Mexico	61.8	Malaysia	66.2
Indonesia	47.7	Malaysia	37.8	India*	33.9
Guyana	25.1	Bangladesh	35.0	Bangladesh	30.1
Honduras	21.3	Honduras	23.1	Guyana	20.0

* Six Nations included in anti-dumping trade dispute, December, 2003.

Where Imports Entered the U.S., 2008

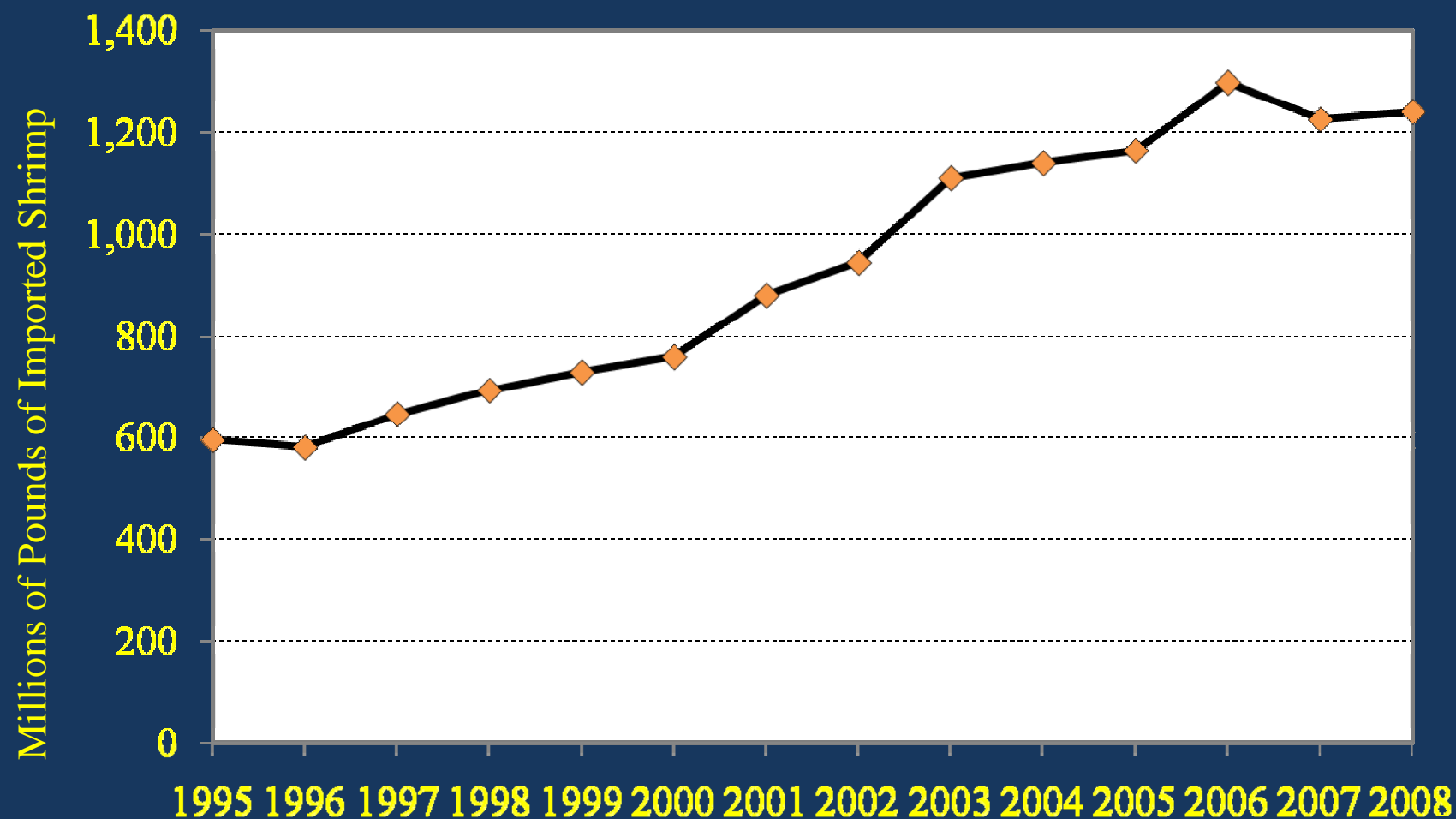
By U.S. Customs Districts

U.S. Total – 1.24 Billion Pounds - \$4.09 Billion

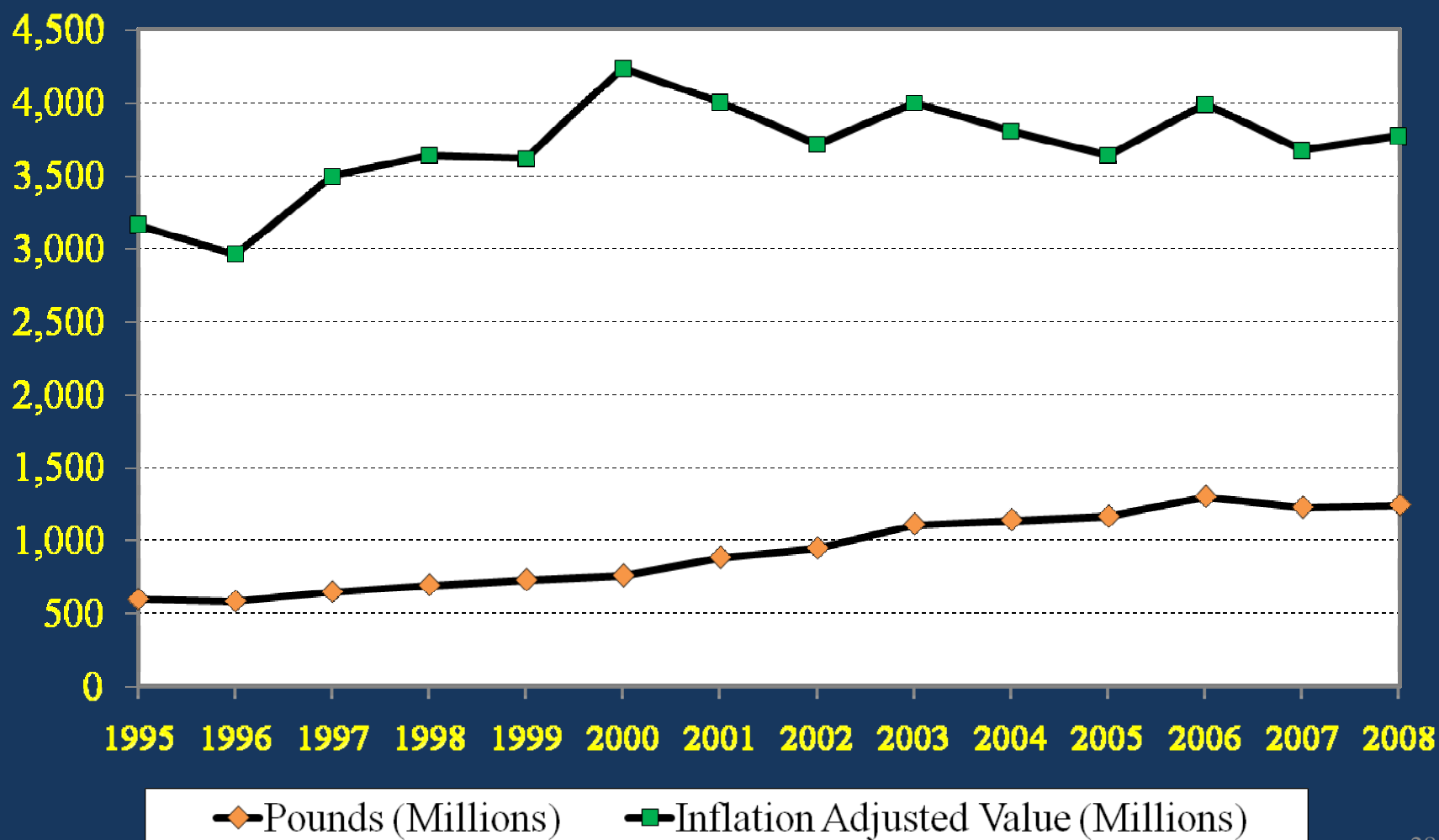


NMFS Fisheries Statistics Division

U.S. Imports Volume: 1995 – 2008 (NMFS Fisheries Statistics Division)



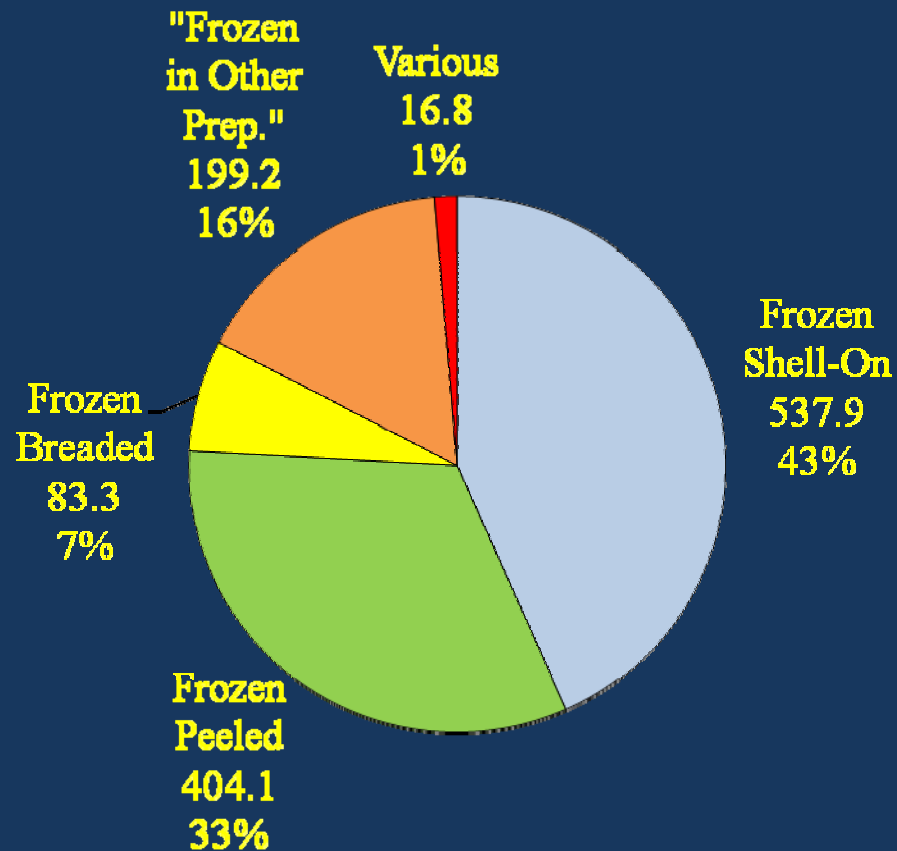
U.S. Imports Volume and Value: 1995 – 2008 (NMFS Fisheries Statistics Division)



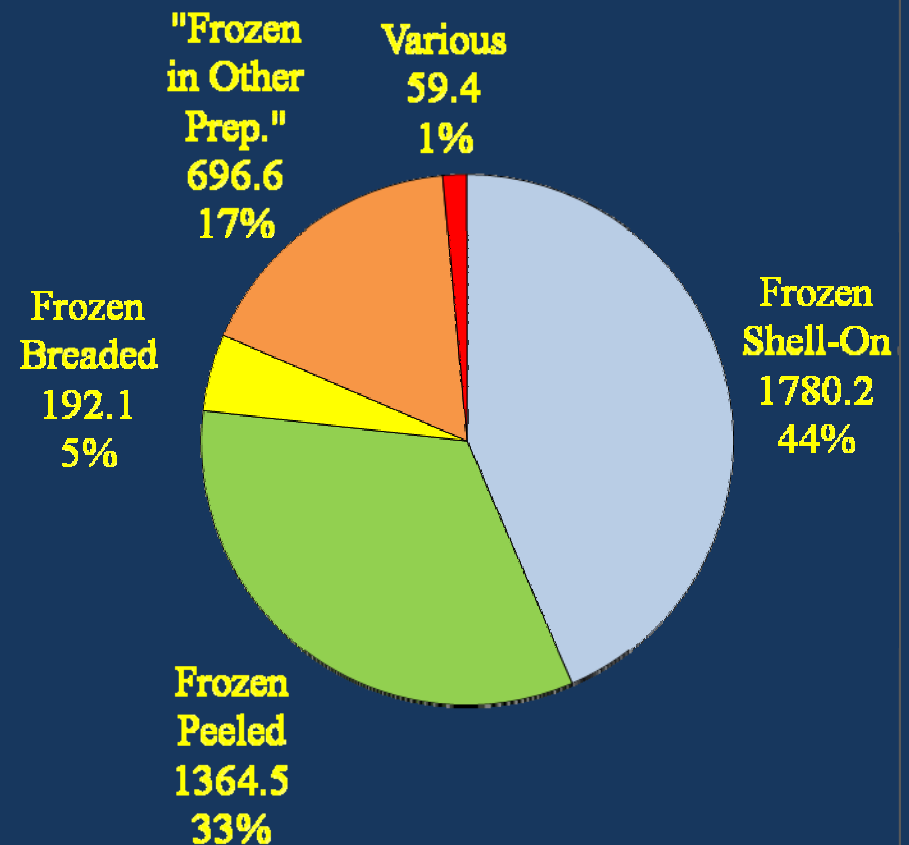
Forms of Shrimp Imports: 2008

(NMFS Fisheries Statistics Division)

Millions of Pounds

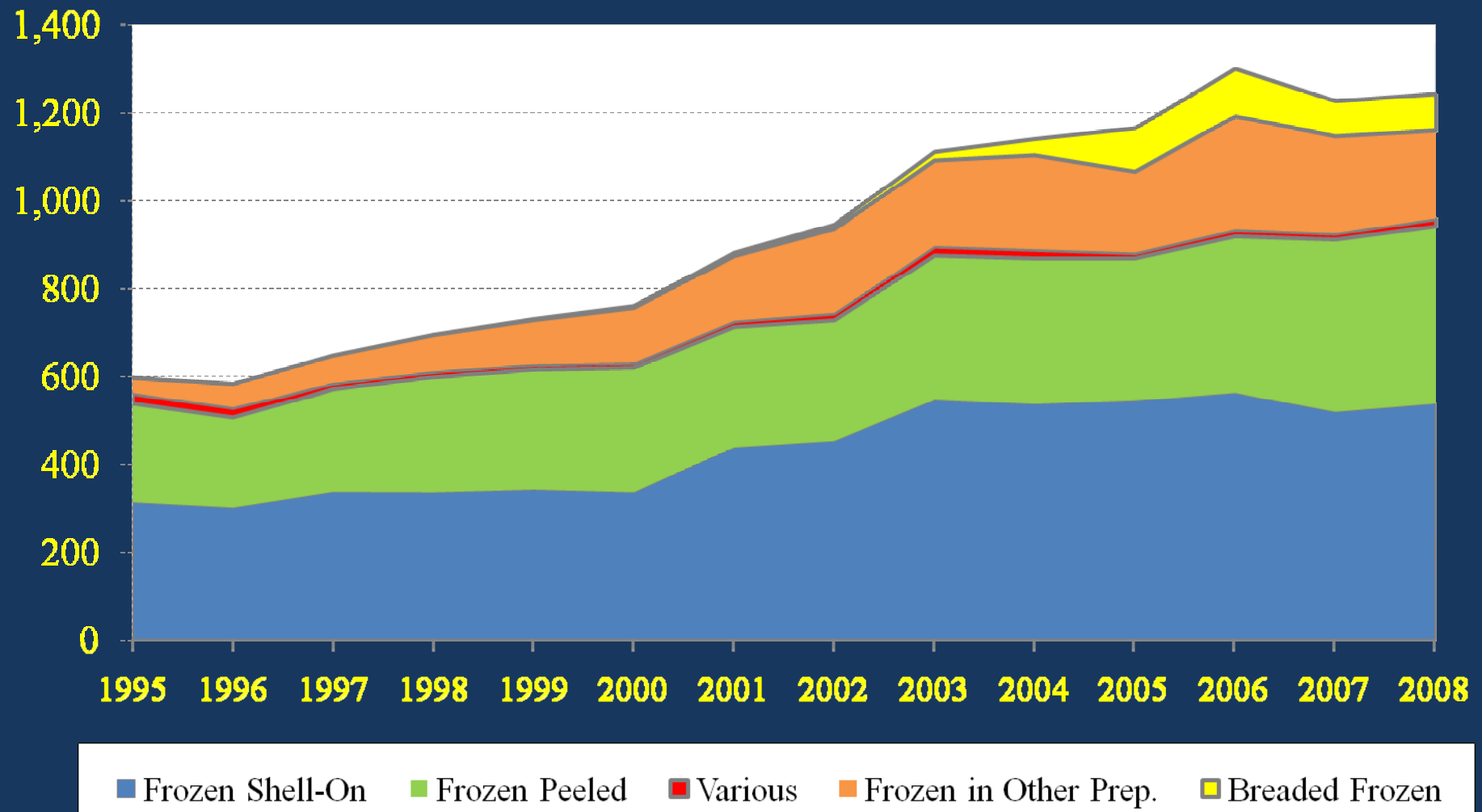


Millions of Current Dollars



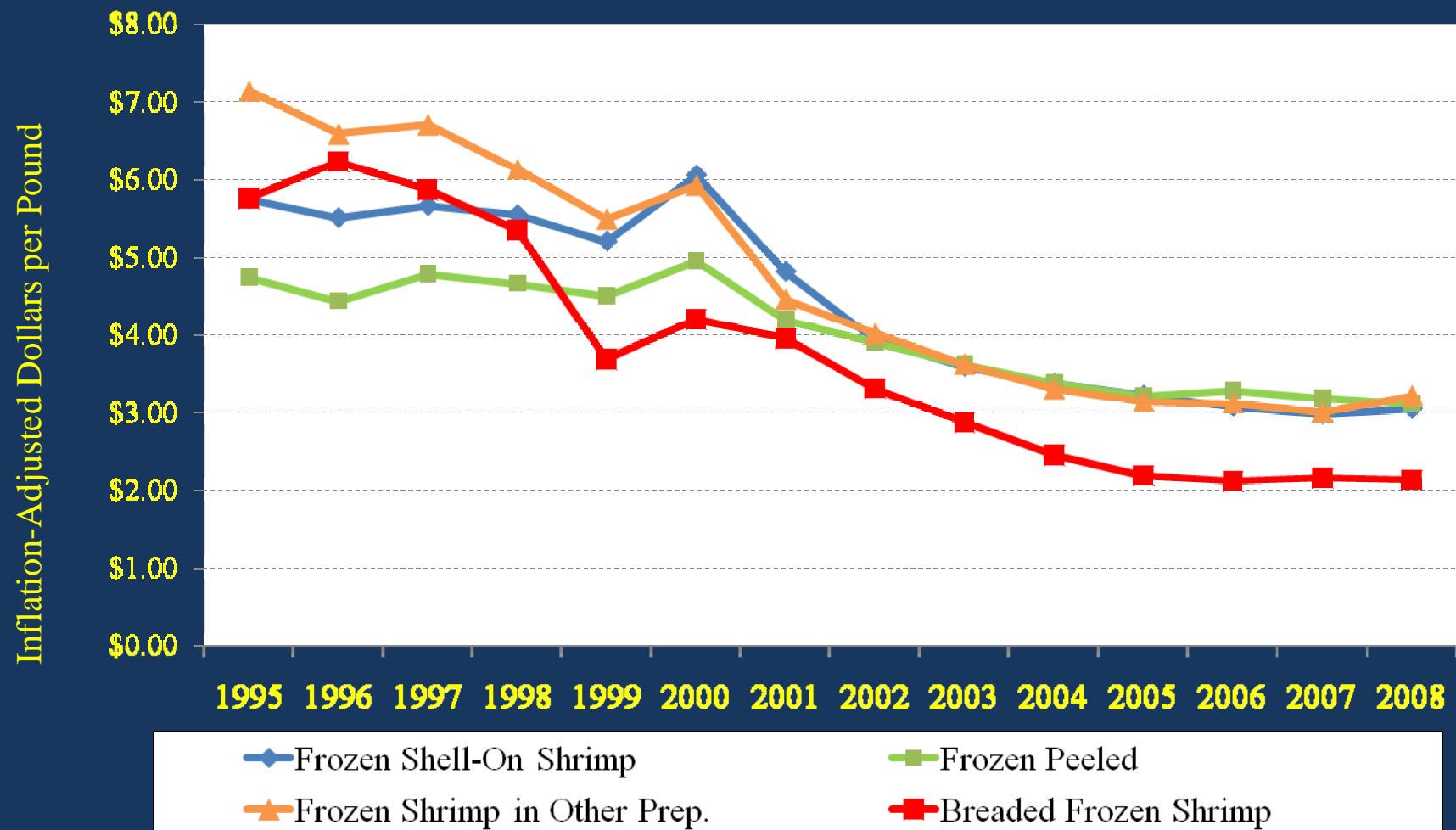
U.S. Shrimp Imports Volume by Form: 1995 – 2008

(NMFS Fisheries Statistics Division)

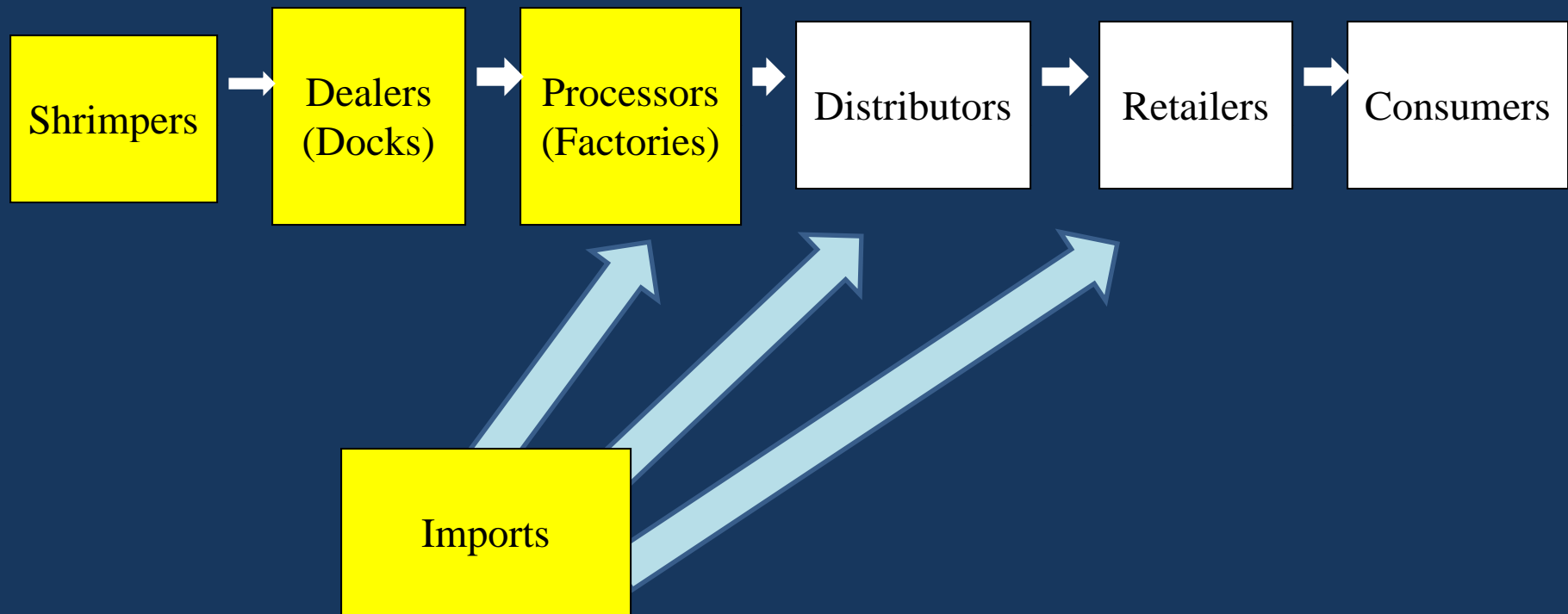


Price per Pound of Imported Shrimp, By Form: 1995 – 2008

(NMFS Fisheries Statistics Division)

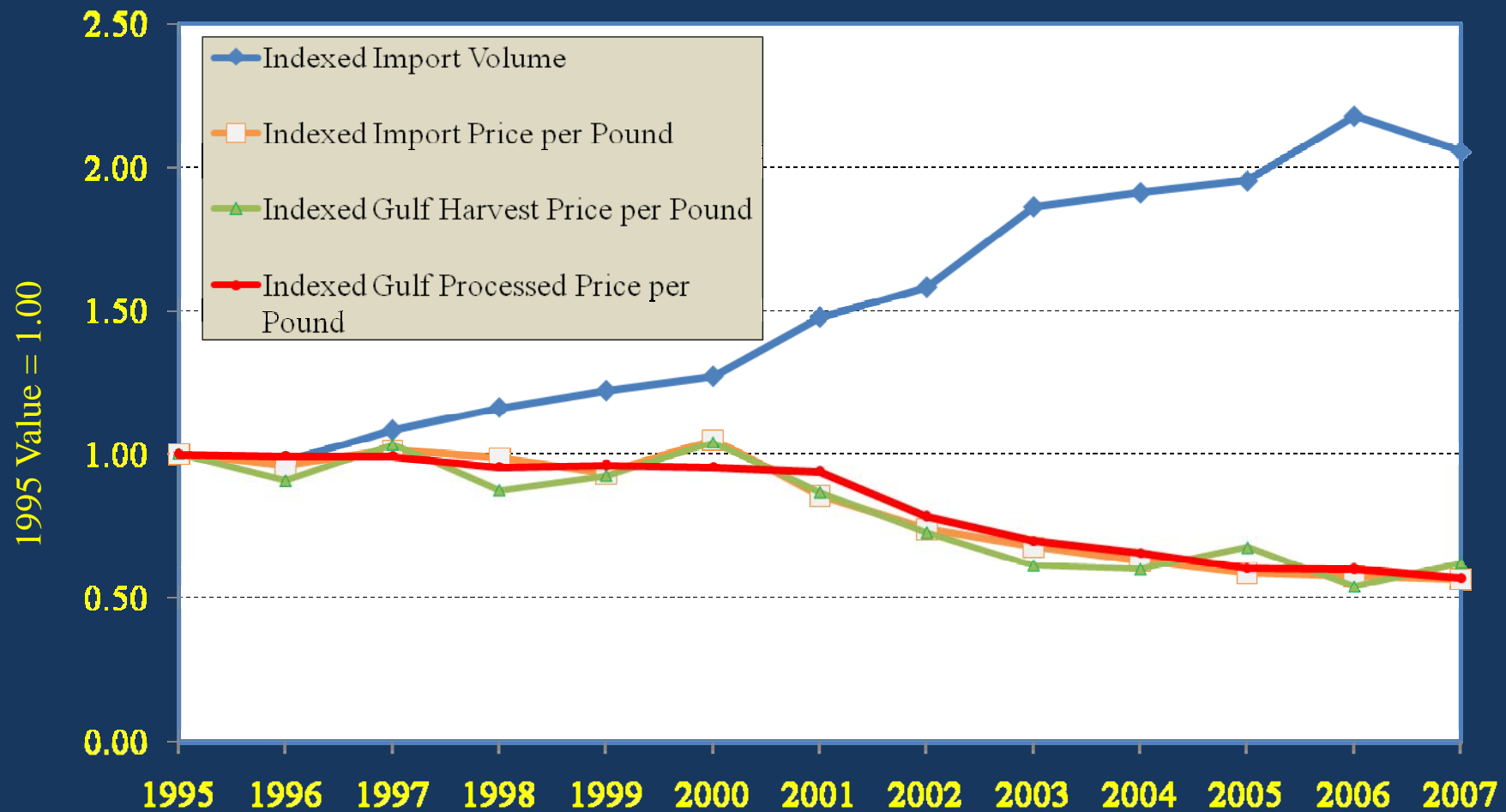


Evidence of a Decline in Shrimp Prices in Different Links of the Supply Chain



Simplified Shrimp Marketing Chain

Indexed Import Volume, Import Price per Pound, Gulf Harvest Price per Pound, and Gulf Processed Shrimp Price per Pound: 1995 - 2007



NOTE: These Indexed Values are very limited measures of relative change.

Ongoing and Upcoming Economic Research

- **Survey of State Waters Shrimpers across the Gulf of Mexico** (with Gulf States MFC)
- **LDWF Survey of Commercial Fishermen**
- **LDWF Survey of Dealers**
- **Survey of Seafood-Related Businesses across the Gulf of Mexico** (with Gulf States MFC)