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

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

- **Louisiana Harvest**: 1995 (98), 2008 (89)
- **Gulf Harvest**: 1995 (234), 2008 (189)
- **USA Harvest**: 1995 (340), 2008 (257)
- **Imports**: 1995 (596), 2008 (1,241)
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

Thousands of Louisiana Residents Holding a Shrimp Gear License

1989: 16,505
Shrimp Harvests in the Gulf, By State: 2008 (NMFS Data)

Millions of Pounds

- TX: 63.9 (34%)
- AL: 17.1 (9%)
- MS: 8.6 (5%)
- LA: 89 (47%)
- FL (WC): 9.9 (5%)

Millions of Current Dollars

- TX: 157.2 (43%)
- AL: 38.4 (10%)
- MS: 17.1 (5%)
- FL (WC): 23.3 (6%)
- LA: 130.2 (36%)

NMFS Data

Millions of Pounds


Louisiana Texas Alabama Mississippi Florida (WC)
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

1. Shrimpers
2. Dealers (Docks)
3. Processors (Factories)
4. Distributors
5. Retailers
6. Consumers

Imports

15
**NMFS Processors Survey: Louisiana, 2006**

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

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

<table>
<thead>
<tr>
<th>Form</th>
<th>Number</th>
<th>Millions of Pounds</th>
<th>Millions of Dollars</th>
<th>Dollars/Pound</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Shrimp</td>
<td>17</td>
<td>41.20</td>
<td>$102.69</td>
<td>$2.49</td>
</tr>
<tr>
<td>Headless</td>
<td>13</td>
<td>9.96</td>
<td>$36.1</td>
<td>$3.62</td>
</tr>
<tr>
<td>Peeled Shrimp Meat</td>
<td>12</td>
<td>30.48</td>
<td>$61.89</td>
<td>$2.03</td>
</tr>
<tr>
<td>Dried Shrimp</td>
<td>6</td>
<td>0.341</td>
<td>$3.36</td>
<td>$9.85</td>
</tr>
<tr>
<td>Shrimp Meal; Peeled &amp; Deveined; Breaded; Bait</td>
<td>4</td>
<td>0.413</td>
<td>$1.34</td>
<td>$3.26</td>
</tr>
</tbody>
</table>
Shrimp Processing in the Gulf, By State: 2007
(NMFS Processors Survey)

**Millions of Pounds**

- **TX**: 67.2 (35%)
- **AL**: 25.3 (13%)
- **FL (WC)**: 32.3 (17%)
- **MS**: 25.3 (13%)
- **LA**: 41.2 (22%)

**Millions of Current Dollars**

- **TX**: 170.1 (34%)
- **FL (WC)**: 95.2 (19%)
- **MS**: 61.6 (12%)
- **LA**: 102.7 (20%)
- **AL**: 74.5 (15%)
(NMFS Processors Survey)
Louisiana Processing Volume & Value: 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

![Graph showing the number of reporting shrimp processors in Louisiana and the Gulf of Mexico from 1995 to 2007. The graph indicates a decline in the number of processors over the years, with the trend more pronounced in the Gulf region.]
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)

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

Where Imports Entered the U.S., 2008
By U.S. Customs Districts

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

- New England
  - 14.1 m Lb.
  - $48 Million

- Pacific
  - 504 m Lb.
  - $1.61 Billion

- Mid-Atlantic
  - 361.2 m Lb.
  - $1.26 Billion

- South Atlantic
  - 191.4 m Lb.
  - $577 Million

- Florida
  - East FL – S. Atlantic
  - West FL - Gulf

- Inland
  - 93.9 m Lb.
  - $388 Million

- Gulf
  - 71.1 m Lb.
  - $188 Million

NMFS Fisheries Statistics Division
(NMFS Fisheries Statistics Division)
(NMFS Fisheries Statistics Division)
Forms of Shrimp Imports: 2008
(NMFS Fisheries Statistics Division)

**Millions of Pounds**

- Frozen Peeled: 404.1 (33%)
- Frozen Breaded: 83.3 (7%)
- Frozen Shell-On: 537.9 (43%)
- Various: 16.8 (1%)
- "Frozen in Other Prep.": 199.2 (16%)

**Millions of Current Dollars**

- Frozen Peeled: 1364.5 (33%)
- Frozen Breaded: 192.1 (5%)
- Frozen Shell-On: 1780.2 (44%)
- Various: 59.4 (1%)
- "Frozen in Other Prep.": 696.6 (17%)

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**Forms of Shrimp Imports: 2008**
(NMFS Fisheries Statistics Division)
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

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)