



UNITED STATES DEPARTMENT OF COMMERCE
National Oceanic and Atmospheric Administration
NATIONAL MARINE FISHERIES SERVICE
Washington, D.C. 20235

*See Bill Gordon -
send to Cohn
as appendix
to minutes*

EXPORT TRADE IN U.S. FISHERY PRODUCTS

1980

YEARLY REVIEW



10TH ANNIVERSARY 1970-1980
National Oceanic and Atmospheric Administration
A young agency with a historic
tradition of service to the Nation

THIS REVIEW WAS PREPARED BY
THE OFFICE OF UTILIZATION AND DEVELOPMENT
FISHERY DEVELOPMENT DIVISION
EXPORT AND DOMESTIC MARKET DEVELOPMENT BRANCH

Prepared Periodically with Quarterly and Yearly Review

Compiled by: Philip O. Atkins, Robert D. Nordstrom, Marcia A. Butler

This is a preliminary report of the United States export trade of fishery products. The statistical and graphical data used in this report has been gathered from many sources available to the National Marine Fisheries Service (NMFS). The information sources include, but are not limited to, the NMFS Washington and Regional Office staffs, the Office of Resource Statistics staff; and the U.S. Census Bureau.

The purpose of this summary is to provide trade data in a manner useful to officials of NMFS, the Department of State and others who negotiate trade agreements, recommend allocation policy and monitor trade activities with foreign countries.

We welcome any comments or suggestions that will improve this report.

Address all comments, inquires or questions to:

*National Marine Fisheries Service (F/UD1)
Export and Domestic Market Development Branch
Washington, D.C. 20235
or call Robert D. Nordstrom (202) 634-7451*

All figures in this report are in U.S. Dollars and Metric Tons.

The final statistical, graphical, and analytical data will be published as it is validated.

TABLE OF CONTENTS

INTRODUCTION
TRADE BACKGROUND
ECONOMIC REVIEW AND FORECAST
PROFILES
SUMMARY

LIST OF TABLES

TRADE DEFICIT/SURPLUS
EXPORT OF PRODUCTS (EDIBLE & NON-EDIBLE)
EXPORT OF EDIBLE PRODUCTS
NET INCREASE/DECREASE IN DOLLARS BY PURCHASING COUNTRY - QUARTERLY
EXPORTS OF SELECTED EDIBLE PRODUCTS
EXPORTS OF SELECTED NON-EDIBLE PRODUCTS
MAJOR EXPORTS OF SELECTED NON-EDIBLE PRODUCTS - QUARTERLY

LIST OF GRAPHS

TRADE DEFICIT
IMPORT/EXPORT TRADE OF U.S. FISHERY PRODUCTS
FISHERY PRODUCT EXPORTS BY METRIC TONS & DOLLARS
MAJOR BUYERS OF FISHERY PRODUCTS EXPORTS - QUARTERLY

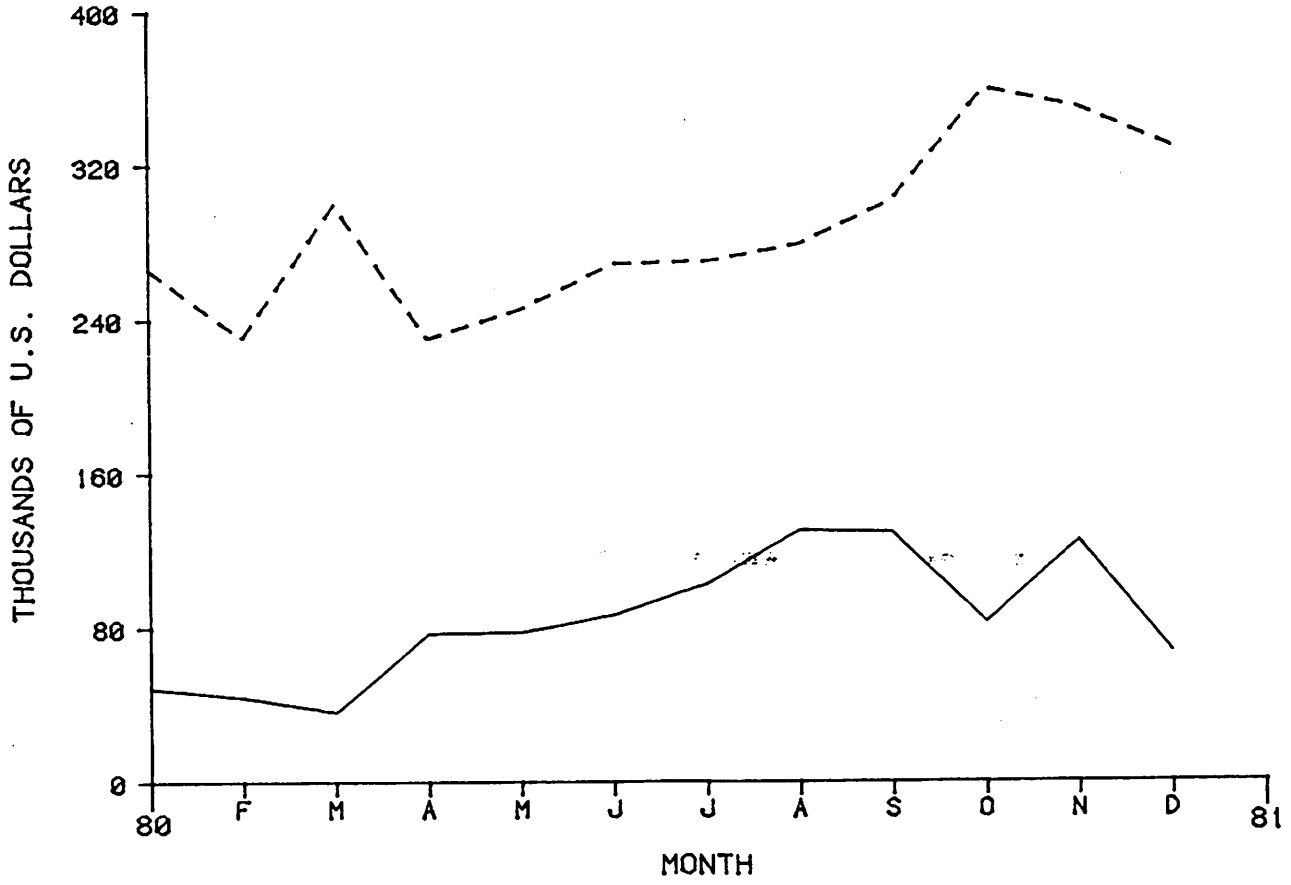
INTERESTING HIGHLIGHTS:

- o Japan was our biggest customer for fresh and frozen salmon (\$106 million), followed by France (\$31 million), and Canada (\$20 million).
- o U.S. canned salmon exports reached \$150 million, including \$73 million for British consumers, \$29 million for Canadians, and \$18 million for Australia and 14 million for the Netherlands.
- o Japan was also our largest customer for frozen king crab (\$58 million) and snow crab (\$48 million).
- o The major buyers of American frozen shrimp were Canada (\$18 million) and Japan (\$11 million).
- o \$16 million worth of menhaden oil was shipped to the Dutch port of Rotterdam.
- o The United Kingdom was responsible for the largest increase in purchases in 1980, with their imports of U.S. fishery products going from \$66 million to \$104 million, a 58% increase.
- o South Korea doubled its imports from the United States from \$14 million to \$28 million, an increase of 96%, which consisted mostly of imports of \$20 million worth of fish roe.
- o Portuguese importers raised their imports by +1,355%. This was due to an increase from \$14,457 in 1979 to \$210,344 in 1980.

NOTE: FIGURES MAY NOT AGREE DUE TO ROUNDING

U.S. TRADE OF FISHERY PRODUCTS, 1980

— EXPORTS
- - - IMPORTS



UNITED STATES FISHERY EXPORTS TOP \$1 BILLION FOR SECOND CONSECUTIVE YEAR

United States fishery exports totaled 473,115 metric tons (m.t.) worth \$1,006,153,988 in 1980, reflecting a slight decrease in value (down 7% or 76 million), but a large increase in quantity (up 32% or 112,159 m.t.) over 1979 exports. U.S. fishery imports were valued at \$3,564,344,249 in 1980, resulting in a \$2,558,190,261 trade deficit in fishery products--- below the record \$2.8 billion trade deficit of 1979.

Edible seafoods accounted for 90-percent of the value of all U.S. fishery exports (\$904 million), but only about half (55% or 260,314 m.t.) of the quantity exported in 1980. Non-edible fishery products (mostly fishmeal and oil) were 212,801 m.t. worth \$102 million.

Japan continued to rank as America's most important seafood customer during 1980, accounting for 40-percent of all United States fishery exports. Japanese importers purchased a total of \$406 million worth of fishery products from U.S. exporters, including \$400 million worth of edible seafoods, such as salmon (\$108 million), king crab (\$58 million), snow crab (\$48 million), shrimp (\$12 million), and salmon and herring roe (\$92 million). The resistance of Japanese consumers to high prices for fish during 1980 led to lower prices for seafoods imported from the United States. Thus, although the level of tonnage stayed fairly high (103,328 m.t. in 1980 versus exports of 132,827 m.t. in 1979) the value of exports dropped by nearly one-third (\$406 million versus \$568 million) below 1979 exports.

The top ten export markets for United States fishery products during 1980 are shown below:

Table 1.--UNITED STATES. Exports of fishery products (both edible and non-edible), by quantity, value, and country, 1980.

RANK	COUNTRY	QUANTITY	VALUE		
			Edible	Non-edible	Total
		Metric tons	US\$1 Million		
1	Japan.....	108,093	400	6	406
2	Canada.....	55,716	144	3	147
3	United Kingdom.....	58,012	88	16	104
4	France.....	14,481	52	1	53
5	The Netherlands.....	44,651	26	20	46
6	West Germany.....	70,392	19	25	44
7	South Korea.....	6,831	27	1	28
8	Belgium/Luxembourg....	17,316	21	5	26
9	Mexico.....	5,480	16	1	17
10	Sweden.....	7,892	13	1	15

Note: Figures may not agree due to rounding.

Salmon from the Pacific Ocean was the most valuable species of fish exported during 1980, with exports reaching \$357 million, which accounted for 39 percent of all U.S. fishery exports. These exports included \$198 million worth of frozen whole salmon, \$150 million worth of canned salmon (up 63%), and \$9 million worth of salmon steaks or fillets. Large stocks of salmon and glutted Japanese market conditions resulted in a reduction in salmon export prices during 1980.

United States exports of fish eggs (primarily salmon or herring roe) to Asian markets contributed \$120 million (down - 3%) to total exports, followed by king crab exports (\$79 million), snow crab (\$50 million), and shrimp (\$66 million). All "other" species contributed \$232 million (an increase of + 5%) to United States fishermen, processors, and exporters. This "otther" category includes many "under-utilized" species of fish and shellfish not normally pruchased by

American consumers--such as squid, octopus, eels, shark, skates, rays, anglerfish, and many other species of fish and shellfish which are very popular in foreign markets.

U.S. Department of Commerce officials are particularly interested in the increase of exports to Italy, South Korea, Spain, and Portugal during 1980, because government-to-government negotiations and U.S. seafood sales missions actively promoted the sale of U.S. seafood products, with particular emphasis on "under-utilized" species to those four countries. Export statistics now confirm that Italy has increased its imports by 55% with edible products up 16%. South Korea increased its purchases by 96%, with edible seafoods (mainly fish roe) up 111%. Spain increased its imports by 93% with edible seafoods up 276% and Portugal increased its imports of U.S. seafoods by 1,355%...consisting only of edible seafoods. This amounts to an average, overall increase of 300% or over \$22 million in sales to these four countries. These export figures show that efforts to develop awareness of America's vast fish and shellfish resources can produce significant export markets overseas.

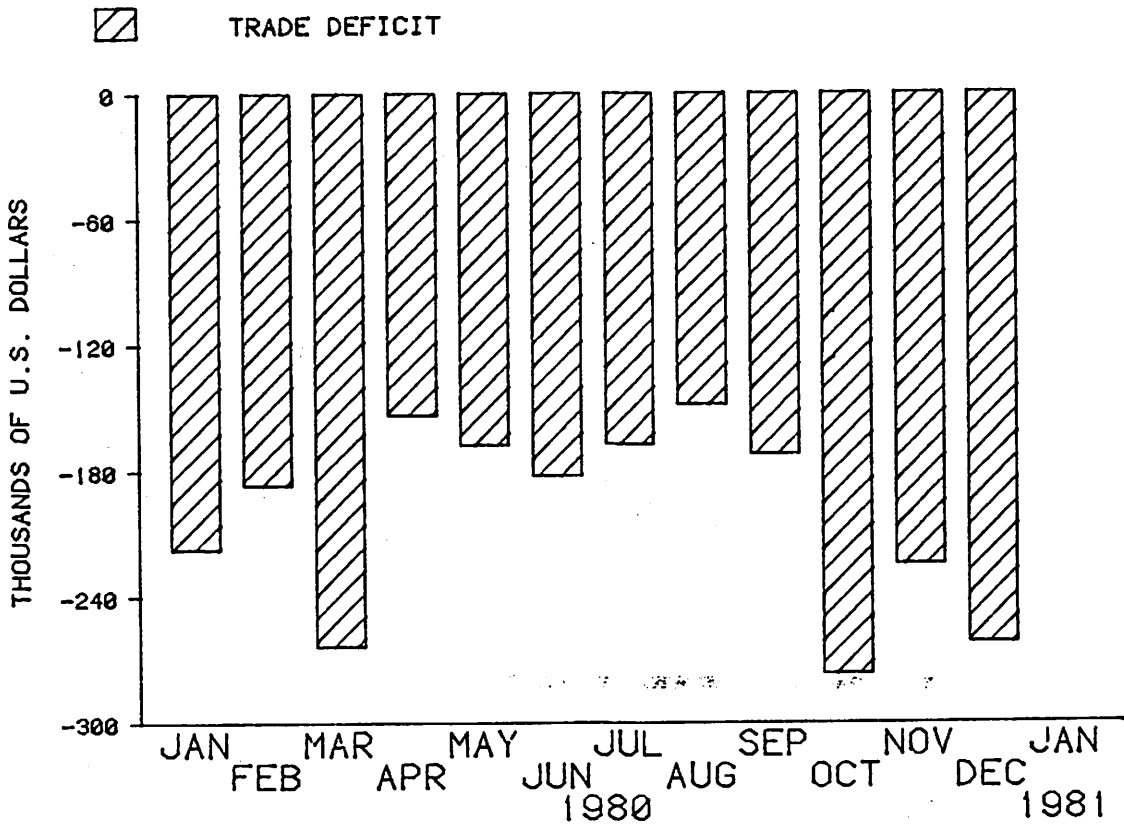
U.S. Government negotiators were also busy working with Japanese government and industry officials to reduce trade barriers and to increase trade in many "under-utilized" species of fish and shellfish during 1980. Japan is already our best customer for "traditional" species of fish and shellfish (such as salmon, king crab, snow crab, shrimp, etc.), so efforts were placed on expanding markets to those species of fish that are popular in Japan, but relatively unknown in the United States. U.S. trade officials do not expect to see significant increases in these species until mid-1981. These same officials believe that trade agreements with Poland may be reached during 1981 which will also lead to important new markets for United States seafood.

FISHERY PRODUCTS

CUMULATIVE JANUARY TO DECEMBER TOTALS

		METRIC TONS	THOUSAND DOLLARS
EDIBLE	IMPORTS	913,479	2,602,284
	EXPORTS	<u>260,314</u>	<u>904,363</u>
	DEFICIT	653,165	1,697,921
NON-EDIBLE	IMPORTS	75,439	45,146
	EXPORTS	<u>212,801</u>	<u>98,776</u>
	DEFICIT/SURPLUS	+137,362	+43,639
PARTIAL NON-EDIBLE	IMPORTS	UNITS HAVE NOT BEEN	916,914
	EXPORTS	REPORTED AND ARE NOT REFLECTED IN THE TOTAL METRIC TON FIGURES	<u>13,016</u>
	DEFICIT	LISTED BELOW.....	903,898
TOTAL	IMPORTS	988,908	3,564,344
	EXPORTS	<u>473,115</u>	<u>1,006,154</u>
	DEFICIT	515,793	2,558,190

U.S. TRADE DEFICIT OF FISHERY PRODUCTS, 1980



U.S. EXPORTS OF FISHERY PRODUCTS (EDIBLE & NON-EDIBLE)

COUNTRY	1979		:	1980		:	1979		:	1980		:				
	---	METRIC TONS		----	---		THOUSAND DOLLARS	----		---	PERCENT		---	THOUSAND DOLLARS	----	---
JAPAN	:	118,575	:	108,093	:	-	07	:	567,849	:	405,876	:	-	29	:	
CANADA	:	39,408	:	55,716	:	+	41	:	119,442	:	146,867	:	+	23	:	3*
* UNITED KINGDOM	:	33,839	:	58,021	:	+	71	:	66,422	:	104,302	:	+	57	:	3*
* FRANCE	:	15,390	:	14,481	:	-	06	:	70,729	:	52,812	:	-	25	:	
* NETHERLANDS	:	39,614	:	44,651	:	+	13	:	41,730	:	45,803	:	+	10	:	4*
* F.R. of GERMANY	:	21,972	:	70,392	:	+	220	:	30,652	:	43,977	:	+	43	:	3*
REPUBLIC OF KOREA	:	5,673	:	6,331	:	+	20	:	14,116	:	27,679	:	+	96	:	3*
* BELGIUM & LUXEMBURG	:	12,749	:	17,316	:	+	36	:	26,550	:	25,944	:	-	02	:	
MEXICO	:	7,225	:	5,480	:	-	24	:	35,991	:	16,537	:	-	54	:	
SWEDEN	:	9,522	:	7,892	:	-	17	:	18,301	:	14,928	:	-	18	:	
* ITALY	:	2,916	:	9,931	:	+	241	:	9,254	:	14,381	:	+	55	:	3*
SPAIN	:	4,825	:	5,558	:	+	15	:	3,444	:	6,650	:	+	93	:	2*
GREECE	:	3,845	:	4,354	:	+	13	:	3,591	:	5,215	:	+	45	:	3*
* DENMARK	:	1,421	:	1,196	:	-	16	:	4,489	:	4,209	:	-	08	:	
NETHERLANDS : ANTILLES	:	879	:	809	:	-	08	:	3,358	:	3,393	:	+	01	:	
* IRELAND	:	175	:	247	:	+	41	:	617	:	951	:	+	55	:	3*
NORWAY	:	802	:	162	:	+	08	:	1,771	:	768	:	-	57	:	3*
PORTUGAL	:	2	:	113	:	+	4811	:	14	:	210	:	+	1355	:	3*
OTHER	:	42,124	:	58,117	:	+	38	:	64,045	:	85,654	:	+	34	:	3*
TOTAL EXPORTS	:	360,956	:	473,115	:	+	31	:	1,082,365	:	1,006,154	:	-	07	:	1*
* E.E.C. TOTAL:	:	128,076	:	216,930	:	+	69	:	250,442	:	292,386	:	+	18	:	3*

* 1 TOTAL QUANTITY UP SHARPLY; VALUE OFF SLIGHTLY.

* 2 QUANTITY UP JUST SLIGHTLY; VALUE OFF SHARPLY.

* 3 QUANTITY & VALUE UP SHARPLY.

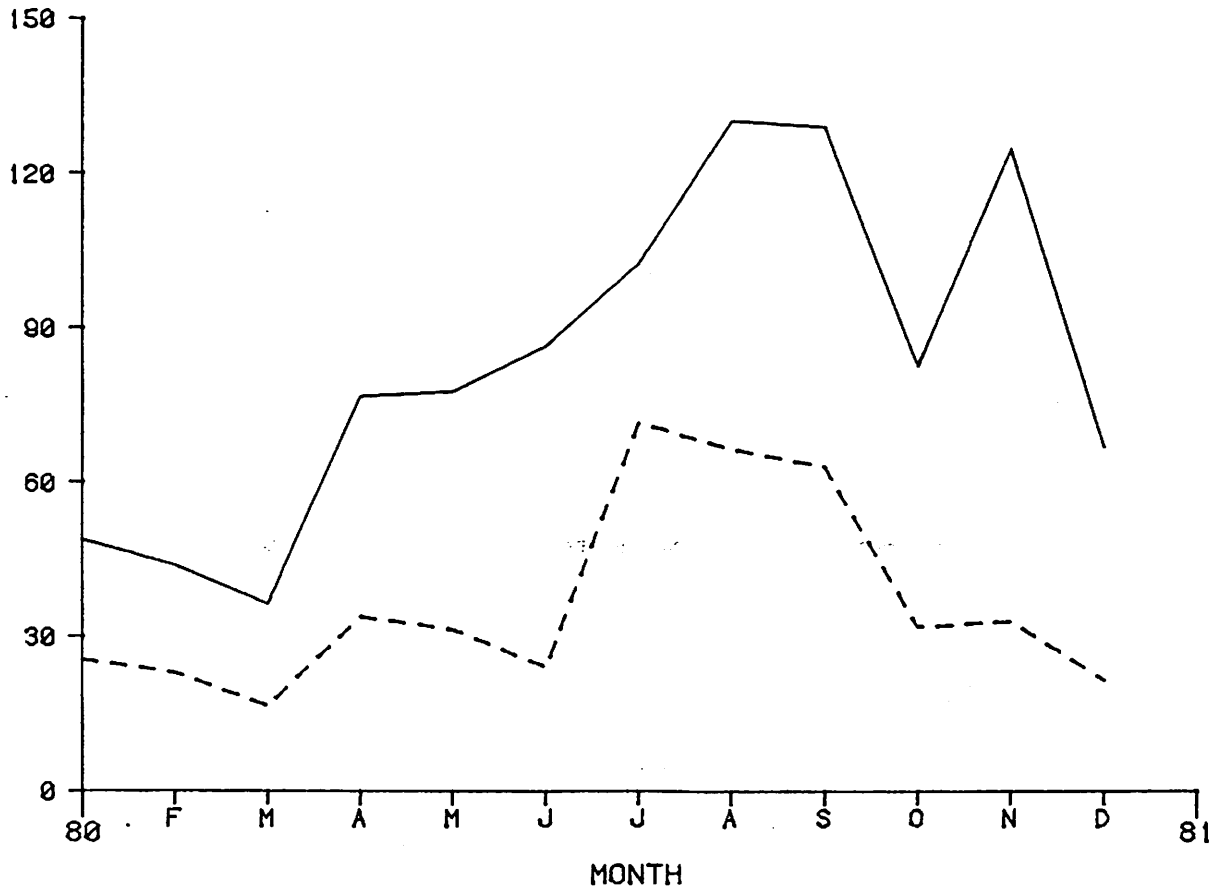
* 4 QUANTITY & VALUE UP SLIGHTLY

THE GREATER MAJORITY OF THE REMAINING COUNTRIES ARE OFF SLIGHTLY IN QUANTITY AND VOLUME.

TOTAL U.S. FISHERY PRODUCT EXPORTS, 1980

—

VALUE IN MILLION U.S. DOLLARS
QUANTITY IN THOUSAND METRIC TONS



U.S. EXPORTS OF EDIBLE FISHERY PRODUCTS

COUNTRY	1979 : 1980		1979 : 1980	
	-----METRIC TONS-----	PERCENT	---THOUSAND DOLLARS---	PERCENT
JAPAN	: 114,816	103,328 : - 10	: 563,006	399,720 : - 29
CANADA	: 37,581	53,744 : + 43	: 116,565	144,355 : + 24
* UNITED KINGDOM	: 13,394	20,039 : + 50	: 56,597	88,403 : + 56
* FRANCE	: 14,497	13,562 : - 60	: 69,783	52,085 : - 64
REPUBLIC OF KOREA	: 4,783	6,207 : + 30	: 12,850	27,176 : + 111
* NETHERLANDS	: 5,519	5,610 : + 02	: 24,745	26,103 : + 05
* BELGIUM & LUXEMBURG	: 4,708	5,606 : + 19	: 22,905	21,298 : - 07
* F.R. OF GERMANY	: 14,831	9,195 : - 38	: 26,156	19,474 : - 26
MEXICO	: 6,373	3,881 : - 39	: 35,477	15,748 : - 56
SWEDEN	: 4,194	3,529 : - 16	: 16,098	13,155 : - 18
* ITALY	: 2,853	2,345 : - 18	: 8,305	9,671 : + 16
GREECE	: 3,842	4,349 : + 13	: 3,573	5,189 : + 45
SPAIN	: 695	4,033 : + 119	: 1,206	4,531 : + 276
* DENMARK	: 1,421	1,196 : - 16	: 4,457	4,110 : - 08
NETHERLANDS ANTILLES	: 879	806 : - 08	: 3,355	3,385 : + 01
* IRELAND	: 175	247 : + 41	: 617	957 : + 55
NORWAY	: 579	159 : - 73	: 1,594	766 : - 52
PORTUGAL	: 2	113 : + 4811	: 14	210 : + 1355
OTHERS	: 19,958	22,365 : + 12	: 52,900	68,027 : + 29
TOTAL	: 251,100	260,314 : + 04	: 1,020,203	904,363 : - 11
* E.E.C. TOTALS	: 57,398	57,800 : + 007	: 213,565	222,101 : + 04

NOTE * ECC membership includes Belgium, Denmark, France, the Rep. of Germany, Ireland, Italy, Luxemburg, the Netherlands and the United Kingdom as of December 31, 1980. Beginning in January of 1981 additional memberships to this nine country Common Market were being considered. At this time Greece has been admitted as a full fledged member.

1980 EEC COMPARISONS WILL NOT INCLUDE GREEK MEMBERSHIP.

1981 EEC COMPARISONS WILL INCLUDE GREEK MEMBERSHIP.

TOTAL EXPORTS OF SELECTED NAMED EDIBLE FISHERY PRODUCTS

SPECIFIC PRODUCTS	1979 : 1980		1979 : 1980	
	:---METRIC TONS---	: PERCENT	:--THOUSAND DOLLARS--	: PERCENT
SALMON; FRESH OR FROZEN, WHOLE	: 63,575	55,389 : - 13	: 302,324	198,397 : - 35
SALMON; FILLETS, STEAKS, PORTIONS	: 1,907	1,521 : - 20	: 9,270	8,674 : - 07
SALMON; CANNED, CURED	: 1,814	281 : - 85	: 6,707	1,102 : - 84
SALMON, CANNED, NOT CURED	: <u>21,191</u>	<u>33,288</u> : - <u>57</u>	: <u>85,210</u>	<u>148,869</u> : + <u>75</u>
* TOTAL SALMON	: 88,487	90,479 : + 22	: 403,511	357,042 : - 12
SHRIMP, FRESH, NOT PACKED	: 703	398 : - 43	: 5,491	2,555 : - 54
SHRIMP; FRESH, PACKED	: 1,228	749 : - 40	: 4,794	4,607 : - 04
SHRIMP, FROZEN	: 11,193	6,070 : - 46	: 77,108	41,766 : - 46
SHRIMP, CANNED	: <u>2,481</u>	<u>2,645</u> : + <u>06</u>	: <u>12,391</u>	<u>17,207</u> : + <u>39</u>
* TOTAL SHRIMP	: 15,605	9,862 : - 37	: 99,784	66,135 : - 34
KING CRAB; FROZEN	: 16,429	13,096 : - 20	: 96,346	76,409 : - 21
KING CRAB; CANNED	: <u>393</u>	<u>169</u> : - <u>57</u>	: <u>3,898</u>	<u>2,179</u> : - <u>45</u>
* TOTAL KING CRAB	: 16,822	13,265 : - 22	: 100,244	78,588 : - 22
SNOW CRAB; FROZEN	: 19,496	15,305 : - 22	: 70,296	49,825 : - 30
SQUID; CANNED	: 3,802	3,843 : + 01	: 2,447	2,327 : - 05
FISH ROE	: 9,530	12,046 : + 26	: 123,551	120,032 : - 03

U.S. EXPORTS; FISHERY PRODUCTS

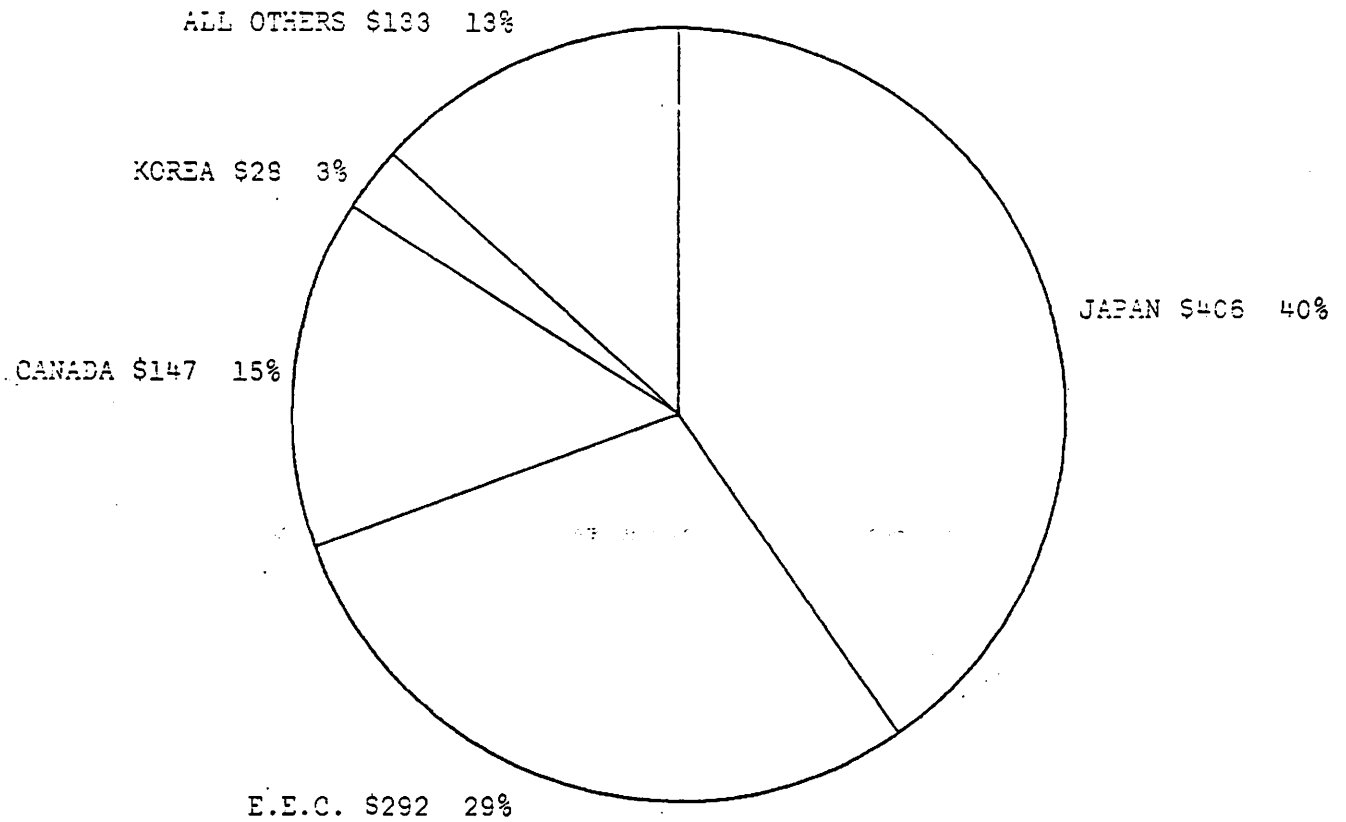
TOTAL EXPORTS OF SELECTED NON-EDIBLE U.S. FISHERY PRODUCTS

SPECIFIC FISHERY PRODUCTS	1979 : 1980		1979 : 1980	
	:---METRIC TONS---	: PERCENT	:--THOUSAND DOLLARS--	: PERCENT
MENHADEN OILS	: 87,500	122,647 : + 40	: 37,622	49,697 : + 32
FISH AND MARINE ANIMAL OILS	: 2,536	6,177 : + 144	: 1,949	2,698 : + 38
FISH MEAL NOT FOR HUMAN FOOD	: 14,243	77,366 : + 443	: 5,526	29,137 : + 427

NET INCREASE/DECREASE IN DOLLARS BY PURCHASING COUNTRY

RANKING ORDER	1980	1980		1979	1980
		INCREASE OR DECREASE :-----THOUSAND DOLLARS-----:		PERCENT	TOTAL AMOUNT PURCHASED :-----THOUSAND DOLLARS-----
<u>SIGNIFICANT INCREASES</u>					
* UNITED KINGDOM	: 37,880	MORE	: + 57	: 66,422	104,302
CANADA	: 27,423	MORE	: + 23	: 119,442	146,865
REPUBLIC OF KOREA	: 13,862	MORE	: + 96	: 14,116	27,679
* F.R. of GERMANY	: 13,325	MORE	: + 43	: 30,652	43,977
* ITALY	: 5,128	MORE	: + 55	: 9,254	14,381
* NETHERLANDS	: 4,073	MORE	: + 10	: 41,730	45,803
SPAIN	: 3,206	MORE	: + 93	: 3,444	6,650
GREECE	: 1,623	MORE	: + 45	: 3,591	5,215
<u>MODERATE INCREASE OR DECREASE</u>					
* IRELAND	: 344	MORE	: + 55	: 617	951
PORTUGAL	: 196	MORE	: +1355	: 14	210
NETHERLAND ANTILLES	: 36	MORE	: - 01	: 3,358	3,393
* DENMARK	: 279	LESS	: - 08	: 4,488	4,209
* BELIGUM & * LUXEBURG	: 606	LESS	: - 02	: 26,550	25,944
<u>SIGNIFICANT DECREASE</u>					
NORWAY	: 1,003	LESS	: - 57	: 1,771	768
SWEDEN	: 3,374	LESS	: - 18	: 18,301	14,928
* FRANCE	: 17,916	LESS	: - 25	: 70,729	52,812
MEXICO	: 19,454	LESS	: - 54	: 35,991	16,537
JAPAN	: 161,973	LESS	: - 29	: 567,849	405,876
OTHER	: 30,862	LESS	: + 34	: 54,792	85,654
TOTAL EXPORTS	: 76,211	LESS	: - 07	: 1,082,365	1,006,154
* E.E.C. TOTAL	: 41,944	MORE	: + 18	: 250,442	292,386

1980 MAJOR BUYERS OF U.S. FISHERY PRODUCTS
COUNTRIES NAMED ACCOUNT FOR 87% OF TOTAL



TOTAL EDIBLE AND NONEDIBLE PRODUCTS

VALUES IN MILLION U.S. DOLLARS

U.S. EXPORTS; FISHERY PRODUCTS
 MAJOR EXPORTS OF NON-EDIBLE U.S. FISHERY PRODUCTS

1979 & 1980 TOTALS

PRODUCT MAJOR BUYERS	1979 : 1980				1979 : 1980			
	:---METRIC TONS---		TONNAGE DIFFERENCE	PERCENT	THOUSAND DOLLARS		DOLLAR DIFFERENCE	PERCENT
MENHADEN OILS	: 87,501	122,647	: + 35,146	: + 40	: 37,622	49,697	: + 12,075	: + 32
NETHERLANDS	: 73,567	38,353	: - 35,214	: - 48	: 14,637	16,007	: + 1,370	: + 09
UNITED KINGDOM	: 20,429	37,951	: + 17,522	: + 86	: 8,828	14,906	: + 6,078	: + 69
PERU	: 0	12,250	: + 12,250	: N.A.	: 0	5,232	: + 5,232	: N.A.
FED. REP. of GERMANY	: 5,420	12,066	: + 6,646	: + 123	: 2,307	5,042	: + 5,042	: + 116
BELGIUM & LUXEMBURG	: 7,979	11,073	: + 3,094	: + 39	: 3,421	4,291	: + 870	: + 25
FISH & MARINE ANIMAL OILS	: 2,536	6,177	: + 3,641	: + 144	: 1,949	2,698	: + 749	: + 38
FED. REP. of GERMANY	: 848	4,667	: + 3,819	: + 450	: 664	1,511	: + 847	: + 128
MEXICO	: 214	545	: + 331	: + 155	: 158	325	: + 167	: + 106
NETHERLANDS	: 726	679	: - 47	: - 06	: 352	307	: - 45	: - 13
CANADA	: 155	161	: + 06	: + 04	: 169	174	: + 5	: + 30
DOMINICAN REPUBLIC	: 0	46	: + 46	: N.A.	: 0	106	: + 106	: N.A.
FISH MEAL NOT FOR HUMAN FOOD	: 14,244	77,366	: + 63,122	: + 443	: 5,526	29,137	: + 23,611	: + 427
FED. REP. of GERMANY	: 863	44,454	: + 43,591	: +5051	: 267	16,763	: + 16,496	: +6,178
EGYPT	: 8,817	8,961	: + 144	: + 02	: 4,024	3,875	: - 149	: - 04
ITALY	: 0	7,504	: + 7,504	: N.A.	: 0	3,002	: + 3,002	: N.A.
PHILIPPINES	: 711	5,526	: + 4,815	: + 677	: 274	2,069	: + 1,795	: + 633
CHINA TAIWAN	: 235	3,670	: + 3,435	: + 146	: 45	1,476	: + 1,431	: +3,180
MARINE SHELLS CRUDE	: 5,576	6,612	: + 1,036	: + 19	: 5,744	7,244	: + 1,500	: + 26
JAPAN	: 3,620	4,493	: + 873	: + 24	: 3,971	5,626	: + 1,656	: + 42
CANADA	: 824	810	: - 14	: - 02	: 388	586	: + 198	: + 51
REP. of KOREA	: 872	607	: - 265	: - 30	: 1,025	401	: - 624	: - 61
ITALY	: 62	76	: + 14	: + 23	: 112	219	: + 107	: + 96
HONG KONG	: 2	62	: + 60	: + 300	: 23	124	: + 101	: + 439
TOTAL NON-EDIBLE PRODUCTS	:109,857	212,801	: + 102,944	: + 94	: 50,841	88,776	: + 37,935	: + 75