

SHRIMP AND TILAPIA ANNUAL REPORT

Shrimp Market Report - December 2004

US Market

During the January-October period, US imports declined 8% in terms of value and 2% in terms of volume. The total value of imports over the period came to US\$ 2 812 millions while volumes amounted to 399 400 MT.

As a result of the anti-dumping process, the traditional seasonality of US shrimp imports was interrupted during 2004. Although imports during October appear to be recovering, they still remain lower than last year.

Suppliers

Thailand was by far the major supplier to the US market over the January-October period. Its level of imports was almost double the level reached by the second supplier, China. The top five Asian suppliers accounted 70 % of total import volumes.

As a result of the downward trend in US imports during the January-October period, sales from some major suppliers showed a drop in volumes. Thailand, China, India, Vietnam and Brazil experienced a decline in sales, losing twelve percentage points in terms of import share compared to 2003: during first 10 months of 2003 these countries accounted 66 % of total volume imports while the share reached just 54% during the same period of 2004. Brazil suffered the largest decline at -58%. All five countries were targeted in the anti-dumping process.

Other countries have profited from the loss in market share of these five countries. Suppliers benefiting most included Indonesia, Ecuador, Mexico, Venezuela, Bangladesh and Malaysia. As a group, these countries increa-

US shrimp market, main trend, January-October period, 2002, 2003 and 2004						
January-October	2002	2003	var03/02	2004	var04/03	
1000 \$US	2660	3067	15%	2812	-8%	
TM	710	341	20%	476	-2%	
SHRIMP IMPORTS unite	337	407 174		399 467		
Value	943		-4%	7,04	-7%	
	7,87	7,73				

sed market share, passing from 20 % in 2003 to 31% in 2004. Ecuador was the only country among the six in the anti-dumping process to have increased volume sales (but not value sales) compared to the corresponding period of 2003.

Almost all the main product categories showed a downward trend in imports, both in terms of volume and value, during the January-October period. Among the major import categories, frozen shell-on shrimp dropped 20% to 195 800 MT (during the first quarter it had increased 54% compared to 2003). However, breaded frozen shrimp and iother preparations showed an upward trend, helped by their exclusion from the anti-dumping process.

Source: INFOPESCA

Country	2003 Kilos	2003 Value	2004 Kilos	2004 Value
TILAPIA FILLET FRESH				
BRAZIL	95,152	417,791	130,160	594,347
CHINA	288,081	948,833	1,602,268	4,451,981
COSTA RICA	2,084,928	11,843,159	2,166,757	12,128,996
ECUADOR	4,726,940	27,621,740	5,413,850	33,829,819
HONDURAS	1,333,668	7,987,911	2,000,676	11,282,356
PANAMA	32,667	189,801	70,791	317,313
TAIWAN	138,598	595,474	74,193	187,959
Subtotal	8,841,500	50,380,389	11,669,351	63,856,608

Country	2003 Kilos	2003 Value	2004 Kilos	2004 Value
TILAPIA FILLET FROZEN				
CHINA	7,056,508	24,267,362	11,578,853	35,226,355
ECUADOR	89,750	427,860	124,586	678,623
INDONESIA	1,761,118	8,832,251	1,972,005	9,302,597
PANAMA	21,922	73,100	54,686	228,114
TAIWAN	1,119,278	4,777,471	1,259,641	4,562,281
THAILAND	579,611	2,264,714	375,598	1,481,828
Subtotal	10,743,160	40,924,556	15,432,513	51,789,351

Country	2003 Kilos	2003 Value	2004 Kilos	2004 Value
TILAPIA FROZEN				
CHINA	15,405,538	16,793,056	15,560,147	16,358,579
COSTA RICA	0	0	7,410	15,517
ECUADOR	90,455	187,022	49,930	112,040
PANAMA	14,988	16,523	27,198	25,565
TAIWAN	9,557,119	11,760,172	10,280,345	11,296,711
THAILAND	39,700	50,972	59,418	58,497
Subtotal	25,278,605	29,000,894	26,069,543	27,967,354
Grand Total	44,863,265	120,305,839	53,171,407	143,613,313

US imports shrimp imports, by origin country January - October 2003 - 2004									
ORIGIN	2004		2003		ORIGIN	2004		2003	
	MT	1000 US\$	MT	1000 US\$		MT	1000 US\$	MT	1000 US\$
Thailand	103436	787977	96069	626766	Colombia	2000	15134	3167	19580
China	60329	334281	49292	248478	Nicaragua	3513	19377	3084	16742
Indonesia	18977	149826	36321	263261	Suriname	1553	5945	2759	10366
India	38032	348563	33317	291379	Guatemala	2546	15542	2540	15397
Ecuador	29652	85939	31593	179294	Peru	1379	8175	2343	13108
Viet nam	47614	496429	29896	316253	Cambodia	0	4	2244	17241
México	16924	200396	18791	210870	U.A.E.	786	2914	1934	8542
Venezuela	8913	55557	14635	77332	Philippines	1012	9125	1246	10808
Bangladesh	6728	68305	14613	141795	Saudi Arabia	928	7895	1067	6679
Honduras	7901	47737	8854	46756	Sri Lanka	1036	10250	986	10505
Malasya	1113	8154	8564	83155	Iran	1048	4786	411	2128
Brazil	20340	91025	8551	37619	Taiwan	207	1593	278	1946
Guayana	9734	33041	7768	25958	Costa Rica	429	3796	271	2594
Canada	5325	34128	7198	47644	El Salvador	523	4607	233	1586
Belize	5224	34613	5167	28558	Others	4468	37345	1392	10576
Panama	5503	44883	4883	38559	TOTAL	407174	3067341	399467	2812476

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