UNITED STATES INTERNATIONAL TRADE COMMISSION

SHRIMP

Report to the President
on Investigation No. TA-201-12
Under Section 201 of the Trade Act of 1974

USITC Publication 773
Washington, D. C.
May 1976

UNITED STATES INTERNATIONAL TRADE COMMISSION

COMMISSIONERS

Will E. Leonard, Chairman
Daniel Minchew, Vice Chairman
George M. Moore
Catherine Bedell
Joseph O. Parker
Italo H. Ablondi

Kenneth R. Mason, Secretary to the Commission

Address all communications to
United States International Trade Commission
Washington, D. C. 20436

NEWS
UNITED STATES INTERNATIONAL TRADE COMMISSION • Office of the Secretary • Washington, D.C. 2043
(202) 523-016

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CONTACT: Robert Childers
(202) 523-0161

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USITC RECOMMENDS ADJUSTMENT ASSISTANCE FOR SHRIMPERS

The United States International Trade Commission today reported to the President that the U.S. shrimp-fishing industry is suffering serious injury from increased imports of shrimp and recommended that import relief in the form of adjustment assistance be provided to the domestic industry catching and landing shrimp.

Commissioners Daniel Minchew, George M. Moore, and Joseph O. Parker formed the majority in finding injury to the shrimpers, with Commissioners Will E. Leonard and Italo H. Ablondi dissenting. Commissioner Catherine Bedell did not participate. In addition, Commissioners Will E. Leonard, Daniel Minchew, and Italo H. Ablondi found no entitlement to import relief for the shrimp-processing industry.

The Commission instituted an investigation on December 11, 1975, in response to a petition from the National Shrimp Congress, to determine if shrimp is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic shrimp industry. At that time, the Commission terminated an investigation into conditions of competition in the shrimp industry under section 332(g) of the Tariff Act of 1930, with information that had

been gathered being made a part of the record in the new investigation. Public hearings were held in Brownsville, Texas; Savannah, Georgia; and New York City as a part of the new investigation.

Alaska, Texas, Louisiana, and Florida have been the principal shrimp-fishing states during the last few years. The U.S. shrimp-fishing industry is estimated to include about 21,000 shrimp fishermen and about 10,100 boats. The total value of shrimp processed by U.S. producers in 1975 was about $400 million.

The volume of imports covered by the investigation increased erratically from 198 million pounds in 1968 to 216 million pounds in 1975. Imports made up about 52 percent of U.S. consumption. Mexico, India, Panama, and Ecuador are the leading countries from which shrimp is imported into the United States, with smaller amounts coming from a number of other countries. Shrimp imported into the United States enters free of duty.

Copies of the Commission's report, Shrimp (USITC Publication 773), containing the views of the Commissioners and information developed during the course of Investigation No. TA-201-12, can be obtained from the Office of the Secretary, United States International Trade Commission, 701 E Street NW., Washington, D.C. 20436.

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Determinations, Findings, and Recommendations of the Commission

Determinations

After considering all of the information received in the course of the investigation, the Commissioners make the following determinations:

Commissioners Moore and Parker determine that shrimp, as described in item 114.45 of the TSUS, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic industry devoted to the catching and landing of shrimp.

Commissioners Leonard and Ablondi determine that an article is not being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Commissioner Minchew determines, with respect to the shrimp-fishing industry, that an article is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic industry producing an article like or directly competitive with the imported article; and determines, with respect to the shrimp-processing industry, that an article is not being imported into the United States in

such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Commissioner Bedell did not participate.

Thus, the Commission determines that shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic industry catching and landing shrimp.

Findings and recommendations

The Commission (Commissioners Minchew, Moore, and Parker) determines that adjustment assistance under chapters 2, 3, and 4 of title II of the Trade Act can effectively remedy such serious injury to the domestic industry catching and landing shrimp and recommends the provision of such assistance.

Views of Vice Chairman Daniel Minchew

Following receipt on November 17, 1975, of a petition filed by the National Shrimp Congress, the United States International Trade Commission (Commission) instituted an investigation on December 11, 1975, under section 201 of the Trade Act of 1974 (Trade Act), to determine whether shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like, or directly competitive with, the imported article.

Before making an affirmative determination under section 201 (b)(1), the Commission must find that all three of the following criteria are met:

(1) That an article is being imported into the United States in increased quantities (such increased imports may be actual or relative to domestic production):

(2) That a domestic industry producing an article like or directly competitive with the imported article is being seriously injured or threatened with serious injury; and

(3) That such increased imports of an article are a substantial cause of the serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Determination

From the information obtained in the present investigation I have concluded that shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States, is being imported in such increased quantities as to be a substantial

cause of serious injury to the domestic shrimp fishing industry. Having concluded that serious injury exists, I do not find it necessary to address the question of the threat of serious injury.

I have further determined from the information available that shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States, is not being imported in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic shrimp processing industry. Specifically, with regard to the domestic shrimp processing industry, I have concluded that the third criterion under section 201(b)(1), as set forth above, has not been met, i.e., that any increased imports of shrimp are not a substantial cause of serious injury, or threat thereof, to the shrimp processing industry. As each of the criteria of section 201(b)(1) must be met, the failure to satisfy any one necessitates the making of a negative determination, no matter what the facts show with regard to the other criteria. Because the present determination with regard to domesti shrimp processors is based on a finding that the "substantial cause" criterion is not met, the discussion as it relates to domestic shrimp processors is limited to that criterion alone.

The domestic industry

In considering whether the criterion of serious injury, or the threat thereof, has been satisfied, it is necessary to determine what is "the domestic industry" which may be suffering the requisite injury. Although the Trade Act provides certain guidelines to be used by the Commission in determining what "the domestic industry" is, it does not specifically define the term. Rather, the Trade Act permits the Commission the discretion to evaluate the relevant facts gathered during the course of the investigation and to define the domestic industry on the basis of these facts.

I am of the opinion that the domestic industry should be divided into two domestic industries:

(1) shrimp boat owners; and

(2) shrimp processors (including freezers, canners and breaders).

In dividing the domestic industry into two parts, it is noted that the business of catching and landing shrimp is entirely different from the business of processing shrimp. The facilities used in catching and landing shrimp (boats and related equipment) are entirely different from the skills employed in the processing of shrimp. 1/

Increased imports

In determining increased imports the Senate Finance Committee gives the Commission some direction when it states in the Senate Finance Committee Report (at page 120):

> The increase in imports referred to would generally be such increases as have occurred since the effectiveness of the most recent trade agreement concessions proclaimed by the President, i.e., as of now, the effectiveness of the Kennedy Round concessions beginning in 1968. 2/

Further, it is necessary to look at trends in imports over a period of years to determine whether imports are increasing.

Total imports of shrimp in all forms increased from 198 million pounds (heads-off weight) in 1968 to 218 million pounds in 1970, declined to 193 million pounds in 1971 and then rose erratically to 252 million pounds in 1974, before dropping to 216 million pounds in 1975. While the increase was erratic, the overall trend of imports shows an increase in actual terms since 1968. On the basis of this rising trend of actual imports, I find that the first criterion, i.e., increasing imports, has been satisfied.

1/ See the views of Chairman Leonard, Vice Chairman Minchew, and Commissioner Parker in Asparagus: Report to the President on Investigation No. TA-201-4..., USITC Publication 755, January 1976, pp. 6-12.

2/ U. S. Senate, Report of the Committee on Finance, Trade Reform Act of 1974 (S. Rept. No. 93-1298) p. 120.

Serious injury 1/

Although the Trade Act provides no precise definition of the term "serious injury," some guidelines which the Commission may wish to consider are outlined in section 201(b)(2)(C) of the Trade Act, which provides:

> with respect to serious injury, the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry.

These guidelines are not considered to be all inclusive, nor does the existence of any one of them necessarily require an affirmative finding of injury. The necessary requirements are left to the considered judgments of the Commission.

The U. S. shrimp fishery is the most valuable fishery in the U.S. In the last decade, U. S. landings of shrimp increased erratically from 152 million pounds (heads-off basis) in 1965 to 237 million pounds in 1971 and then declined to 208 million pounds in 1975. The landings in 1975 were about 8 percent less than in 1974.

In 1974, more shrimp was consumed in the U. S. than in any other year, yet despite the increase in consumption, fishing boats in the southeast, the most important area, made fewer trips than in 1973. There is considerable evidence that there was a significant idling of fishing craft in 1974 and 1975 which in turn is reflected in unemployment or underemployment in the fishing industry.

The U. S. fishing industry has suffered in the export market also, as exports have declined from 58 million pounds (heads-off basis) in 1973 to 39 million pounds in 1974 and 38 million pounds in 1975.

While the Commission was unable to obtain as good a sampling as it would have liked with regard to profit-and-loss data, returns from questionnaires and a study of a selected sample of boat owners showed that they suffered combined net operating losses during 1974 which amounted to a ratio of 14.3 percent of total sales.

1/ As stated earlier under "determination" domestic shrimp processors will not be considered in this section.

From the above information, I have concluded that the domestic shrimp boat owners have been seriously injured, and that the second criterion, i.e., that of serious injury, has been met.

Substantial cause

The Trade Act, at section 201(b)(4) defines "substantial cause" as a "cause which is important and not less than any other cause." In addressing the question of substantial cause the House Ways and Means Committee stated:

> The Committee intends that a dual test be met -- imports must constitute an important cause and be no less important than any other single cause. For example, if imports were just one of many factors of equal weight, imports would meet the test of being "not less than any other cause" but it would be unlikely that any of the causes would be deemed an "important" cause. If there were any other cause more important than imports, then the second test of being "not less than any other cause" would not be met. On the other hand, if imports were one of two factors of equal weight and there were no other factors, both tests would be met. 1/

The Senate Finance Committee Report addressed the question by stating:

> The Committee recognizes that "weighing causes in a dynamic economy is not always possible. It is not intended that a mathematical test be applied by the Commission. The Commissioners will have to assure themselves that imports represent a substantial cause or threat of injury, and not just one of a multitude of equal causes or threats of injury. It is not intended that the escape clause criteria go from one extreme of excessive rigidity to complete laxity. An industry must be seriously injured or threatened by an absolute increase in imports, and the imports must be deemed to be a substantial cause of the injury before an affirmative determination should be made. 2/

1/ Report of the House Committee on Ways and Means (H. Rept. No. 93-571) p. 46.

2/ SFCR at 121 and 122

In determining "substantial cause" it is necessary, therefore, to consider two tests. First, a cause must be important; and, second, a cause must be not less than any other cause.

As was stated under the discussion of the "domestic industry" the facilities and skills of the employees in the two industries are different, but, in addition, the effects of imports on the two industries can also be different. While the domestic boat owners would probably benefit from having fewer, or no imports, the domestic shrimp processors who rely, in part, on imports for processing would have a totally different experience. This is true not only in the shrimp industry but in many agricultural areas in which production facilities are different from processing facilities. It is necessary, therefore, in my opinion, to discuss each industry separately, inasmuch as they may be affected by imports in different ways.

There are several factors which may be considered causes of serious injury to the two domestic industries. These factors are:

(1) increased imports;

(2) the recession;

(3) the increase in costs of production, i.e., fuel costs;

(4) a "surplus" of domestic shrimp craft

(5) a "shortage" of shrimp available to domestic shrimpers.

The relative importance of these factors will be discussed under an analysis of the two industries.

(1) Shrimp boat owners

With respect to the recession, imports of shrimp were increasing rapidly throughout the recessionary period which ended in 1974. The apparent consumption of shrimp in the U.S. has been increasing for many years and reached a peak of 415 million pounds during 1974. While the recession may have had some effect, I do not find that it was as important a cause as increased imports.

The increase in the cost of production, i.e., fuel costs, is certainly an important factor, which did contribute to losses in pro-

duction and profits. However, the U. S. domestic fishing fleet was as able to meet increasing costs as the importers, who continued to ship shrimp to the U.S. in increased amounts. In weighing this factor, I do not feel that it was as important as increased imports.

Other possible causes which have been mentioned as the cause of serious injury are "too many vessels" or "too few shrimp." I do not consider the former to be an important cause of serious injury, if a cause of injury at all. As for the "shortage" of shrimp, I think it is fair to say that shrimp availability is cyclical, and that the most up-to-date scientific studies show that the basic supplies of shrimp remain fairly stable. There is little evidence to suggest that recent years have been out of the ordinary.

As for increasing imports as a factor of serious injury, it is important to note that after imports began to increase in early 1974, the prices received by U. S. shrimp fishermen dropped by about one-half. In 1975, when ex-vessel prices returned to the level of 1973, however, the receipts for shrimp landed again adequately covered operating costs; thus indicating that there would have been less of a financial loss in 1974 had there been no drop in price. While this does not conclusively prove that increasing imports were the cause of the shrimp boat owners financial problems, it does point to price suppression at a time when the other important factor, i.e., increasing fuel costs, was present.

On balance, and considering the new criteria established under the Trade Act of 1974, I must conclude that increased imports were the substantial cause of serious injury to the domestic boat owner industry, and find that all the criteria have been met for this industry to entitle it to import relief.

(2) Shrimp processors

Despite the difficulties of the domestic shrimp boat owner industry, the domestic shrimp processing industry was not, in my opinion, seriously injured by increasing imports. The shrimp processing industry

relies to a substantial extent on imported fresh shrimp, which are processed in domestic processing plants; therefore, it is natural that increased imports would affect the domestic shrimp processing industry to a lesser extent.

In addition, processors and wholesalers built up prices and inventories in 1973 during the time when high prices existed. The holders of these large inventories then suffered losses as the prices of shrimp declined.

I have concluded that increased imports are not the most important cause of serious injury to the domestic shrimp processing industry, and therefore conclude that the "substantial cause" criterion has not been met. Having held that one of the necessary criteria has not been met, I must determine that the domestic shrimp processing industry is not eligible for import relief.

Remedy recommendation

Section 201(d)(1) of the Trade Act provides, in part, that if the Commission finds with respect to any article, as a result of its investigation, the serious injury or threat thereof described in that section, that the Commission shall --

> (A) find the amount of the increase in, or imposition of, any duty or import restriction on such article which is necessary to prevent or remedy such injury, or
>
> (B) if it determines that adjustment assistance under chapters 2, 3, and 4 can effectively remedy such injury, recommend the provision of such assistance. . .

I have determined that adjustment assistance under chapters 2, 3, and 4 of the Trade Act and effectively remedies the injury to the domestic shrimp boat owners industry, and recommend the provision of such assistance.

By providing adjustment assistance substantial pressure resulting from increased production costs within the industry will be alleviated. Shrimp boat operators will be able to obtain loans or loan guarantees which will make them competitive with foreign producers. Workers will

be entitled to receive benefits, and communities who are affected by increased imports and losses of business will be entitled to assistance.

Conclusion

I have determined that shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States, is being imported in such increased quantities as to be a substantial cause of serious injury to the domestic shrimp fishing industry, and recommend the provision of adjustment assistance under chapters 2, 3, and 4 of the Trade Act for that industry.

I have further determined that shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States, is not being imported in such increased quantities as to be a substantial cause of serious injury to the domestic shrimp processing industry.

Views of Commissioners George M. Moore and Joseph O. Parker

On December 11, 1975, the United States International Trade Commission instituted an investigation under section 201 of the Trade Act of 1974 to determine whether shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

On the basis of the evidence established by the Commission's investigation, we determine that shrimp, as described above, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic industry engaged in the catching and landing of shrimp (hereinafter referred to as the domestic shrimp-fishing industry).

The Trade Act requires that each of the following conditions be met before an affirmative determination can be made:

(1) Imports of the articles concerned are entering the United States in increased quantities;

(2) The domestic industry producing articles like or directly competitive with the imported articles concerned is being seriously injured or threatened with serious injury; and

(3) Increased imports are a substantial cause of the serious injury, or the threat thereof, to the domestic industry producing articles like or

> directly competitive with the imported articles concerned.

Increased imports

During the years 1971-75 there was a rising trend of imports of shrimp covered by this investigation. In 1971, imports of these shrimp totaled 193 million pounds (heads-off basis) and thereafter increased irregularly to 216 million pounds in 1975. In 1974, imports of shrimp reached 252 million pounds, the highest level in history. This represented an increase of 42 million pounds over 1973 imports. On the basis of the rising trend of actual imports, we find the first criterion set forth above to be satisfied, i.e., that imports of shrimp are entering the United States in increased quantities.

Serious injury

Although the Trade Act does not define the term "serious injury", it does set forth guidelines to be considered by the Commission. Section 201(b)(2) of the Trade Act states:

> In making its determinations under paragraph (1), the Commission shall take into account all economic factors which it considers relevant, including (but not limited to)-- (A) with respect to serious injury, the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry.

More shrimp were consumed in the United States in 1974 than in any other year. In this same year imports of shrimp reached record levels. These imported shrimp were sold at sharply declining prices. The wholesale price in New York of large-to-medium size shrimp imported from India,

Pakistan, Indonesia, and South America, primarily in frozen form, declined by approximately 30 percent during 1974. These lower priced imports had a depressing effect and contributed to sharply lower ex-vessel prices paid to domestic shrimp fishermen, although retail prices showed a much smaller decrease. As a result of these lower priced imports, the volume of shrimp landed by U.S. fishermen decreased slightly. The number of trips made in 1974 by shrimp boats at U.S. ports along the Gulf of Mexico, one of the centers of the U.S. shrimp-fishing industry, was approximately 10 percent below the number of trips made in 1973. The number of trips made in 1974 was also below the 5-year averages of trips made from these ports during the periods 1965-69 and 1970-74. This idling and underutilization of productive facilities also caused unemployment and underemployment within the domestic shrimp-fishing industry.

Returns from questionnaires and a study of selected boatowners in this investigation show that in 1974 a significant number of boatowners operated at a loss. The selected boatowners covered by this study had a combined net operating loss which was the equivalent of approximately 15 percent of their total sales.

The domestic shrimp-fishing industry is still suffering the impact of these losses. During 1974 production costs increased sharply as a result of the energy crisis and inflationary pressures on the cost of materials and services employed in shrimp fishing. Thus, the increased low-priced imports in 1974 were particularly injurious because they came at a time when the domestic industry was confronted with rising energy costs as well as other inflationary pressures. As a result, prices to

the domestic shrimp-fishing industry declined, its capital structure was damaged, and its competitive position was impaired.

Generally speaking there are two primary sources of credit for fishermen: private lending institutions and the Small Business Administration. Some evidence received by the Commission indicates that the Small Business Administration was not particularly responsive at this time to the needs of the shrimp-fishing industry. Furthermore, after the 1974 loss experience described above private banking sources were less willing to extend credit to the shrimp fishing industry. Because of the lack of adequate credit on reasonable terms, the domestic shrimp-fishing industry has been unable to modernize existing equipment with more efficient fishing gear or to purchase new boats of the size and efficiency necessary to improve its productivity and competitive position. The impact of this lack of credit brought about as a result of the experience of the domestic shrimp-fishing industry in 1974, is still adversely affecting the domestic industry as it seeks to reestablish adequate financing arrangements and rebuild its capital structure. Based on the foregoing we find the second criterion set forth above to be satisfied.

Substantial cause

In section 201(b)(4) of the Trade Act, "substantial cause" is defined to mean "a cause which is important and not less than any other cause." In commenting on this criterion in its report on the bill which became the Trade Act the Senate Committee on Finance stated:

> The Commissioners will have to assure themselves that imports represent a substantial cause . . . and not just one of a multitude of equal causes 1/

If increased imports are one of several important and equal causes, the third criterion set forth above is satisfied. We have already determined that imports of shrimp have increased within the meaning of the statute and that the domestic shrimp-fishing industry is being seriously injured. It only remains to be determined whether these increased imports are important and not less than any other cause of the serious injury which we have found to exist.

The two largest shrimp-importing nations in the world are the United States and Japan. In 1974, Japanese imports of shrimp declined by 30 million pounds (product weight basis). The difference in the volume of imports formerly consumed in the Japanese market and actual imports into Japan in 1974 was about the same as the increase of imports into the United States and contributed to the all-time high level of U.S. imports of shrimp. Even though domestic consumption of shrimp was also increasing to an all-time high, the proportion of the domestic market supplied by domestic production declined as the increased supplies of imported shrimp became available at significantly lower prices. These increased imports at lower prices were the primary cause of the depressed prices received by U.S. fishermen. The inability of domestic shrimp fishermen to maintain their prices, coupled with the increased costs related to the energy crisis and other inflationary factors, prevented

1/ Trade Reform Act of 1974: Report of the Committee on Finance . . . S. Rept. No. 93-1298 (93d Cong., 2d sess.), 1974, pp. 120-121.

domestic shrimp fishermen from operating profitably and caused attendant damage to their capital and credit structure. Therefore, we find increased imports to be a substantial cause of serious injury to the domestic industry and the third criterion set forth above to be satisfied.

Remedy

Pursuant to section 201(d)(1) of the Trade Act, we determine that adjustment assistance is the most appropriate form of relief and can effectively remedy the serious injury to the domestic shrimp-fishing industry.

Views of Chairman Will E. Leonard and
Commissioner Italo H. Ablondi

Determination

Having considered the evidence gathered by the United States International Trade Commission (Commission) in the course of this investigation on shrimp (investigation No. TA-201-12), we determine that the criteria as set forth in section 201(b)(1) of the Trade Act of 1974 (Trade Act) for an industry to be eligible for relief from imports have not been met. 1/ Specifically, we find that increased imports of shrimp are not a substantial cause of any serious injury, or the threat thereof, which the domestic shrimp-fishing industry may be suffering. Further, we find that the domestic shrimp-processing industry is not being seriously injured or threatened with serious injury.

Domestic industries

Before considering whether increased imports are a substantial cause of serious injury, or the threat thereof, to "the domestic industry" in this investigation, it is first appropriate to determine what constitutes the domestic industry. The domestic industry is not

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1/ For a domestic industry to be eligible for import relief (which as used in this statement of views includes import restraints as well as adjustment assistance), the Trade Act essentially requires that three criteria be met:

(1) Imports of the articles concerned must be entering in increased quantities.
(2) The domestic industry producing articles like or directly competitive with the imported articles must be experiencing serious injury, or the threat thereof.
(3) Increased imports referred to in (1) above must be a substantial cause of the injury, or the threat thereof, referred to in (2) above.

expressly named in the Commission's notice of investigation, which was published in the Federal Register; rather, the notice describes the imported articles within the scope of the Commission's investigation.

The Trade Act does not define the term "domestic industry." Instead, it provides guidelines and permits the Commission to use its best judgment in light of those guidelines and the relevant economic factors present in a given case. In some instances it may be appropriate to carve out two or more industries from a universe of domestic facilities. The Commission determines what constitutes the domestic industry only after it has gathered relevant facts in the course of its investigation. 1/

Section 201(b)(1) does provide that the domestic industry must produce "an article like or directly competitive with the imported article." The term "like or directly competitive with" is not expressly defined in section 201 of the Trade Act. However, the report of the Senate Committee on Finance on the bill which became the Trade Act discusses the term, as follows:

> The term "like or directly competitive" used in the bill to describe the products of domestic producers that may be adversely affected by imports was used in the same context in section 7 of the 1951 Extension Act and in section 301 of the Trade Expansion Act. The term was derived from the escape-clause provisions in trade agreements, such as article XIX of the GATT. The words "like" and "directly competitive," as used previously and in this bill, are not to be regarded as synonymous or explanatory of each other, but rather to distinguish between "like" articles and articles which, although not "like", are nevertheless

1/ For a further discussion of the meaning of the term "domestic industry" as used in sec. 201, see Bolts, Nuts, and Screws of Iron or Steel: Report to the President on Investigation No. TA-201-2 . . ., USITC Publication 747, 1975, pp. 4-8.

> "directly competitive." In such context, "like" articles are those which are substantially identical in inherent or intrinsic characteristics (i.e., materials from which made, appearance, quality, texture, etc.), and "directly competitive" articles are those which, although not substantially identical in their inherent or intrinsic characteristics, are substantially equivalent for commercial purposes, that is, are adapted to the same uses and are essentially interchangeable therefor. 1/

The words "directly competitive with" are defined in terms of an earlier or later stage of processing in section 601(5) of the Trade Act:

> An imported article is "directly competitive with" a domestic article at an earlier or later stage of processing, and a domestic article is "directly competitive with" an imported article at an earlier or later stage of processing, if the importation of the article has an economic effect on producers of the domestic article comparable to the effect of importation of articles in the same stage of processing as the domestic article. For purposes of this paragraph, the unprocessed article is at an earlier stage of processing.

The statutory guidelines, legislative history, and relevant economic factors in the present investigation strongly support the conclusion that there are two distinct groups of domestic facilities producing articles like or directly competitive with the imported article. The first group, which constitutes one domestic industry, is the shrimp-fishing industry. It consists of the boats and facilities used in the catching and landing of shrimp. Since most

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1/ Trade Reform Act of 1974: Report of the Committee on Finance . . ., S. Rept. No. 93-1298 (93d Cong., 2d sess.), 1974, pp. 121-122 (hereinafter "Finance Committee Report").

of the shrimp which are imported into the United States enter in a processed form (mostly frozen), the domestic shrimp-fishing industry can be said to be producing an article directly competitive with the imported processed shrimp within the meaning of the definition of "directly competitive with" set forth in section 601(5) of the Trade Act (quoted above). The second group of domestic facilities, which constitutes a second domestic industry, is the shrimp-processing industry. This second industry is composed of the facilities devoted to the freezing, canning, and breading of shrimp. 1/ This industry produces articles "like" and "directly competitive with" the imported shrimp within the meaning of the "like or directly competitive with" definition of the Finance Committee Report quoted above. Thus, domestic frozen shrimp is "like" imported frozen shrimp, domestic canned shrimp is "directly competitive with" imported canned shrimp, and so forth.

There are good reasons for finding two industries in the instant investigation. Shrimp fishermen generally do not own or control shrimp-processing facilities, and shrimp processors generally do not own shrimp boats. 2/ Facilities used and skills employed in the fishing and

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1/ In some cases it is possible in a practical sense to carve out two or more industries from among processors. See, for example, Asparagus: Report to the President on Investigation No. TA-201-4 . . ., USITC Publication 755, 1976, pp. 7-8, in which an asparagus-freezing industry and an asparagus-canning industry were found. Such a carving out is not practical with respect to shrimp processors because of the tendency of many processors, especially those on the west coast, to perform two or more processing operations in the same facility and to compile financial data on a plant basis rather than by type of processing operation, and because of a lack of data broken down in the necessary way.

2/ Cf. Mushrooms: Report to the President on Investigation No. TA-201-10 . . ., USITC Publication 761, 1976, pp. 7-8, in which one domestic industry consisting of facilities devoted to the growing and canning of mushrooms was found, partly because about half of the domestic canners of mushrooms grew some or all of the mushrooms used in their canning operations.

processing industries are very much different. Further, marketing procedures are substantially different, with fishermen selling most of their catches to processors, and processors selling primarily to retailers and restaurants. Finally, many processors, especially breaders, import shrimp (primarily in the frozen state), but fishermen do not import shrimp.

Shrimp-fishing industry

As stated above, we have found that increased imports of shrimp are not "a substantial cause" of serious injury, or the threat thereof, to the domestic shrimp-fishing industry. Since the Trade Act requires that all three of the criteria set forth in section 201 must be satisfied for there to be an affirmative determination (the three criteria are set forth in footnote 1 of p. 18, supra) and since we have found that the third criterion, the "substantial cause" criterion, is not satisfied, we will limit our discussion below to the reasons why this criterion is not satisfied.

Section 201(b)(4) of the Trade Act defines the term "substantial cause" to mean "a cause which is important and not less than any other cause." Thus, a dual test must be satisfied: a cause must be both "important" and "not less than any other cause." Further, section 201(b)(2) provides that the Commission, in making its determinations, shall take into account all economic factors which it considers relevant, including (but not limited to)--

* * * * * * *

> (C) with respect to substantial cause, an increase in imports (either actual or relative to domestic production) and a decline in the proportion of the domestic market supplied by domestic producers. 1/

The Finance Committee Report explained (p. 120) the term "substantial cause" and described the decision-making procedure with respect to it which the Commission should follow in this way:

> The Committee recognizes that "weighing" causes in a dynamic economy is not always possible. It is not intended that a mathematical test be applied by the Commission. The Commissioners will have to assure themselves that imports represent a substantial cause or threat of injury, and not just one of a multitude of equal causes or threats of injury. It is not intended that the escape clause criteria go from one extreme of excessive rigidity to complete laxity. An industry must be seriously injured or threatened by an absolute increase in imports, and the imports must be deemed to be a substantial cause of the injury before an affirmative determination should be made.

After considering all of the relevant economic factors, we find that increased imports, even if an important cause of serious injury or the threat thereof, are a less important cause than at least one other cause. Hence, we find that the "substantial cause" criterion is not satisfied.

Perhaps the primary manifestation of any injury being suffered by the shrimp-fishing industry was the result of its inability

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1/ A more detailed analysis of the meaning of the term "substantial cause" can be found in Wrapper Tobacco: Report to the President on Investigation No. TA-201-3 . . ., USITC Publication 746, 1975, pp. 4-7.

in 1973 and 1974 to pass along sharply higher costs of production. Diesel-fuel prices doubled and, in some cases, tripled between 1973 and early 1974. Shrimp fishing is a fuel-intensive business--not only may the trawlers have to travel several hundred miles or more to the shrimping grounds, but the trawlers must drag large nets in the course of catching the shrimp. Information before the Commission indicated that costs such as fuel, ice, and packing as a percentage of sales increased from 37 percent in 1971 to 46 percent in 1974 before declining to 32 percent in 1975. Labor, insurance, and boat-maintenance costs also rose rapidly. For example, salaries and wages as a percentage of sales rose steadily from 28 percent in 1971 to 32 percent in 1975.

While costs of production were increasing rapidly, prices (ex-vessel) paid to shrimp fishermen were not increasing proportionately. Prices began trending upward in 1971 after having been relatively steady since 1968, turned sharply upward in mid-1972, and reached historic peaks in mid-to-late 1973. In 1974, prices fell dramatically to 1968-69 levels before rising to a new historic peak in August 1975. Indexes of U.S. ex-vessel prices (1967=100) rose from 104.6 in November 1970 to 230.6 in November 1973, fell to 132.6 in December 1974, and then rose to 232.9 in August 1975.

The cause of the inability to pass along production-cost increases in 1973 and 1974 is attributable to various factors, including the level of imports. However, at least one of these factors was more important in this respect than imports.

A principal cause of the rapid fluctuation in prices during 1973 and 1974 appears to have been the excessive inventorying of shrimp beginning in the third quarter of 1972 and the unloading of these inventories in mid-1973 and much of 1974. During 1973, U.S. imports of shrimp decreased by 27 million pounds, or by about 12 percent, from the 1972 level. Shrimp is perishable over time, even when frozen or otherwise prepared or preserved, and much of the inventory had to be liquidated. The reductions in inventories which took place between mid-1973 and the end of 1974, occurring as they did during a period of considerable uncertainty as to the future of demand, had a serious depressing effect on the prices of newly landed shrimp. 1/

The trend in the ratio of imports to consumption, which as indicated above is one factor which the statute directs the Commission to examine with respect to the question of substantial cause, remained relatively constant for shrimp during the period 1968-75. The ratio was 55 percent in 1968 and rose irregularly to 58 percent in 1972 before declining, again irregularly, to 52 percent in 1975. Thus, it is clear that imports are not taking over an increasing share of the domestic shrimp market. Further, during several years when the ratio of imports to consumption was actually higher than in the period 1973-75, there is no evidence that the domestic industry was being injured in the terms of the statute. This indicates that other factors probably

1/ In addition to the effect of changes in inventories, factors such as changes in domestic landings, prices of substitute goods, and marketing costs contribute to changes in ex-vessel prices.

played a greater role than imports during the period 1973-75 in causing any injury which the domestic industry may be suffering, and we consider the situation in which excessive inventories caused a level of prices too low to keep pace with rapidly increasing costs to be one such factor.

Shrimp-processing industry

As stated above, we have found that the second criterion, that of serious injury, or the threat thereof, is not satisfied with respect to the domestic shrimp-processing industry. Because the finding that one of the three statutory criteria is not satisfied necessarily results in a negative determination, the discussion below will be confined to the criterion which is not satisfied.

The Trade Act does not expressly define the term "serious injury, or the threat thereof." Rather, as with the term "domestic industry," it provides guidelines in the form of economic factors which the Commission is to take into account. Thus, section 201(b)(2) provides that the Commission is to take into account all relevant economic factors, including but not limited to--

> (A) with respect to serious injury, the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry;
> (B) with respect to threat of serious injury, a decline in sales, a higher and growing inventory, and a downward trend in production, profits, wages, or employment (or increasing underemployment) in the domestic industry concerned 1/

1/ For a more detailed discussion of the term "serious injury, or the threat thereof," see Bolts, Nuts, and Screws of Iron or Steel . . ., pp. 9-12.

It should be noted, however, that a finding that any one or all of the factors are present does not necessarily result in a finding that the criterion is satisfied if there are other factors which lead one to the opposite conclusion. 1/ And with respect to the "threat" of serious injury, the Finance Committee Report (p. 121) defines threat to exist "when serious injury, although not yet existing, is clearly imminent if imports trends continued unabated."

Because the term "serious injury, or the threat thereof" is expressed in the disjunctive, the criterion is satisfied when either a finding of serious injury or a finding of threat of serious injury is made. Conversely, when a negative determination is made on the basis of this criterion, the determination must be based on findings that there is neither serious injury nor threat of serious injury. Because we have found that the domestic shrimp-processing industry is not being seriously injured or threatened with serious

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1/ See, for example, Trade Reform Act of 1973: Report of the Committee on Ways and Means . . ., H. Rept. No. 93-571 (93d Cong., 1st sess.), 1973, p. 47:

> A new section has been added concerning the factors to be taken into account by the Tariff Commission in determining serious injury, threat of serious injury, and substantial cause. These factors are not intended to be exclusive. It is important to note that the Commission is directed to take into account all economic factors it considers relevant. The committee did not intend that an industry automatically would satisfy the eligibility criteria for import relief by showing that all, or some of the enumerated factors, were present at the time of its petition to the Tariff Commission. That is a judgment to be made by the Tariff Commission on the basis of all factors it considers relevant.

injury, we shall discuss, in turn, the relevant economic factors concerning each aspect of the criterion below.

Serious injury.--The evidence does not support a finding of serious injury to the domestic shrimp processors. Evidence shows that some 12 of approximately 200 domestic processing facilities closed in 1974 and that several of them reopened in 1975. Thus, it would not appear that there is significant idling of productive facilities in the industry. Furthermore, prices for the products of the subject industry are presently at an alltime high, as previously indicated.

Furthermore, testimony and submissions from representatives of the industry would appear to indicate that the bulk of the industry does not consider itself injured by imports. In testimony presented to the Commission at its New York hearing, Mr. Lee Weddig, executive director of the National Fisheries Institute, opposed the petition. The National Fisheries Institute represents a substantial part of the processing industry (see transcript of the hearing, pp. 109-115). Mr. John Cracknell, vice president of Brilliant Seafood, Inc., a major U.S. processor of shrimp products, testified at the same hearing that his firm depends on imports of shrimp for its processing operations (see transcript, pp. 116-117). Testimony to the same effect was made at the New Orleans hearing 1/ by Mr. Victor Mavar, president of the American Shrimp Canners Association.

1/ The New Orleans hearing was held on Nov. 11, 1975, in connection with investigation No. 332-77, on conditions of competition between domestic and imported shrimp. This investigation was terminated simultaneously with the institution of the present investigation, but the information obtained in investigation No. 332-77 was incorporated into the present investigation.

Threat of serious injury.--The evidence does not support a finding that the domestic shrimp-processing industry is threatened with serious injury--that is, that serious injury is "imminent." As indicated above, several of the processors which did suspend production in 1974 reopened in 1975. Also, as indicated, prices for the products of shrimp processors rose steadily after the fourth quarter of 1974. Inventories, on the other hand, declined to their lowest levels in at least 5 years.

Further, evidence indicates that world production has stabilized and is not expected to change significantly in the near future, thus making a dramatic change in import levels unlikely. Indeed, import levels in 1975 were significantly below 1974 levels. Import statistics for the first quarter of 1976 do not indicate that any kind of dramatic change in the level of imports is underway.

Conclusion

Based upon the evidence gathered by the Commission in the course of this investigation, we have determined that increased imports of shrimp are not a substantial cause of serious injury, or the threat thereof, to the two relevant domestic industries discussed herein.

INFORMATION OBTAINED IN THE INVESTIGATION

Introduction

On November 17, 1975, the National Shrimp Congress filed a petition with the United States International Trade Commission for import relief pursuant to section 201 of the Trade Act of 1974.

Following receipt of the petition, the Commission instituted an investigation on December 11, 1975, to determine whether shrimp, fresh, chilled, frozen, prepared, or preserved (including pastes and sauces), provided for in item 114.45 of the Tariff Schedules of the United States, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or threat thereof, to the domestic industry producing an article like or directly competitive with the imported article. Public notice of the Commission's investigation and public hearings in Brownsville, Texas, and Savannah, Georgia, was published in the Federal Register on December 23, 1975 (40 F.R. 59377-78); notice of the places and times of the Brownsville and Savannah hearings and the date of an additional hearing in New York City was published in the Federal Register on January 26, 1976 (41 F.R. 3785); and notice of the place and time of the New York hearing was published in the Federal Register on February 3, 1976, (41 F.R. 4981). Public hearings were held on January 27, 1976, in Brownsville, Texas, on February 3, 1976, in Savannah, Georgia, and on February 5, 1976, in New York City, and all interested parties were afforded an opportunity to be present, to produce evidence, and to be heard.

Simultaneous with the institution of this investigation on December 11, 1975, the Commission notice dated December 18, 1975, terminated investigation No. 332-77, which it had instituted on its own motion on August 8, 1975, concerning conditions of competition between domestic and imported shrimp, under section 332(g) of the Tariff Act of 1930. 1/ Public hearings in connection with the section 332 investigation were held on October 29, 1975, in Kodiak, Alaska, November 11, 1975, in New Orleans, Louisiana, and November 18, 1975, in Washington, D.C. The information obtained in the course of investigation No. 332-77 was utilized in the section 201 investigation.

The Commission obtained information during this section 201 investigation at the public hearings, from written briefs submitted by interested parties; through field visits and interviews by members of the Commission's staff with shrimp vessel owners, processors, and importers, from responses to questionnaires sent to domestic shrimp vessel owners, processors, and importers, and from other Government agencies.

The Commission reported to Congress in 1960 and 1961 on investigations it had conducted under section 332 on the impact of imports on the domestic production of shrimp. 2/

1/ Notice of the institution of the sec. 332 investigation and of hearings to be held in connection therewith was published in the Federal Register on Sept. 9, 1975 (40 F.R. 41856). Notice of the termination of the investigation was published in the Federal Register on Dec. 23, 1975 (40 F.R. 59377).

2/ Shrimp: Report on Investigation No. 332-38 . . ., 1960; Shrimp: Report on Investigation No. 332-40 . . ., TC Publication 8, 1961.

Description and Uses

Shrimp are crustaceans that abound in the salt waters of many parts of the world, especially in the coastal waters of the tropics and subtropics; a few kinds live in fresh water. Shrimp caught commercially vary greatly in size, depending on the species and stage of growth.

Most of the shrimp caught off the U.S. Gulf and South Atlantic States (referred to hereafter as the Southeast) are commonly designated as brown, white, and pink. 1/ The principal cold-water species, sometimes called northern pink, constitutes about 85 percent of the catch off Alaska and the major share of the catch in the North Atlantic, from New England to Scandinavia. The northern pink shrimp are much smaller than the typical warm-water shrimp. The freshwater shrimp are of minor commercial significance in the United States.

Most warm-water shrimp grow rapidly and have a life cycle of about 1 year (some species live much longer). The northern pink shrimp grow slowly and may live to the age of 4 or 5; they reach commercial size (a few hundred to the pound) at about 3 years of age. Over the years, the population of warm-water shrimp in the Gulf of Mexico has varied somewhat widely above and below an apparently stable base; natural factors have caused year-to-year changes in the annual supply. The populations of cold-water shrimp in the North Atlantic Ocean and in parts of the North Pacific Ocean, on the other hand, have been less stable over the long term, sometimes increasing or decreasing in

1/ A particular species of shrimp often has dissimilar common names in different countries or in different localities of the same country. Also, a common name, such as white shrimp, may refer to one species in a certain locality and to another species in a different locality.

numbers over a period of many years. Declines in the supplies of cold-water shrimp in some areas can be so great that shrimp fishing ceases for years, whereas declines in the annual supplies of warm-water shrimp are much less drastic, with relatively little disruption to the shrimp-fishing operations. Cold-water-shrimp fishing is regulated more stringently than warm-water-shrimp fishing, because cold-water shrimp have a slower growth rate and some live in relatively concentrated areas where they could be overfished.

Shrimp are used primarily for human food, although a small amount is used as fish bait. They are one of the most popular seafood products in the United States and in many other countries. The edible portion, called shrimp meat, constituting about 50 percent of the shrimp's weight, consists of the muscular section of the "tail"; the forward end, or "head" (head, thorax, legs, and viscera) is discarded. The bulk of the shrimp undergo processing, such as peeling, freezing, breading, cooking, and drying. The various forms in which processed shrimp are marketed may be grouped as follows: Fresh or frozen, heads-off, shell-on; fresh or frozen, cooked, whole; frozen, peeled, raw or cooked; frozen, breaded whole meats, raw or cooked; frozen, breaded "extruded" shrimp; cured (dried, salted, spiced, smoked, or pickled); canned; canned specialties, such as pastes, sauces, soups, and cocktails; and frozen specialties, such as burgers, creole, chow mein, and dinners.

Pink shrimp are preferred for the peeled shrimp product because of its color. In the production of breaded shrimp, the pinks, browns, and whites from the domestic catch, as well as various species of imported shrimp, are all used in substantial quantities. Canners in the Gulf

States use almost all browns and whites; the pinks are not readily available, and sea-bob shrimp are not usable. U.S. imports of shrimp consist principally of frozen heads-off, shell-on shrimp and frozen peeled shrimp, but also include significant amounts of canned shrimp, breaded shrimp, and minor amounts of dried shrimp and various shrimp specialties.

The size of the individual shrimp is one of the most important factors in determining the form in which it reaches the ultimate consumer. For most species there is a wide range of sizes. Sizes are usually indicated by the approximate number (count) of heads-off, shell-on shrimp to the pound. Some shrimp are so large that the count is under 5 to the pound and some so small that the count is 200 or more to the pound. The large sizes sell at higher prices per pound than the small sizes. Shrimp counting up to 30 to the pound are generally sold heads-off, shell-on, principally to restaurants, hotels, clubs, and the like. The medium and small sizes, 30 to 65 to the pound, go principally to breaders, canners, and other processors, and to retail stores. Extra-small shrimp that count 65 to 100 to the pound go to canners, driers, and producers of specialties. Tiny shrimp, those smaller than 100 per pound, are largely used by the processors of peeled, canned, or specialty shrimp. The foregoing usages by size have been changing in recent years, however, as all sizes of shrimp now tend to be included both in breaded and in peeled end products.

The domestic shrimp fleet generally lands fresh shell-on shrimp at the fishing ports, although some craft freeze their catches at sea. Almost all imported shell-on shrimp enter in the frozen form.

A major shrimp item in U.S. trade is the heads-off, shell-on shrimp frozen in 5-pound cartons. This item is produced from domestically caught shrimp, and it is also imported in this form. It goes to restaurants and other institutions, to processors (particularly shrimp breaders), and to chainstores, where it is thawed and sold in bulkform--although some is sold at retail in the original 5-pound cartons.

Frozen shell-on shrimp imported in 5-pound cartons are similar to those produced in the South Atlantic and Gulf States, grade for grade, although the imports include a wider range of size and quality. The typical 5-pound block is formed by filling the carton with shrimp and freezing it; the block probably includes a few pieces of broken shrimp. A superior product, known as layer pack and available only in imports, consists of a block of shrimp, hand-packed in layers, and containing no broken pieces. The user can break off the amount of shrimp needed without having to thaw the entire block. Some imports of shrimp in cartons, on the other hand, are consistently inferior to the domestic product. In recent years, imports of breaded shrimp, canned shrimp, and shrimp specialties have been small.

Breaded shrimp are popular in the retail and restaurant trade. Although some breaded shrimp is considered gourmet grade, the price of most breaded shrimp is more attractive to the consumer than that

of peeled shrimp or canned shrimp. Breaded shrimp consists of deveined and wholly or partly peeled shrimp that have been dipped in batter and coated with breading.

In the early 1970's, when the cost of raw shrimp was rising, the breaders introduced "extruded" or "preformed" shrimp products. They consist of pieces of broken shrimp or whole tiny shrimp that are chopped, usually mixed with extenders such as soy protein, and compressed into shrimp shaped pieces or shrimp sticks and then breaded. The processors use Pacific or New England shrimp, when available, but for the most part they use imports of tiny peeled shrimp from India for their raw material. Although the end product is considered to be breaded shrimp for statistical purposes and it is apparently accepted as breaded shrimp by the consumer, it cannot be labeled as such. It is sold under such trade names as "Shrimp N'Batter," "Shrimp Sticks," and "Shrimp Crescents."

Peeled raw shrimp are produced by the same firms that produce breaded shrimp. They are marketed in various forms--individually frozen, frozen in blocks, deveined (a dark "vein" is removed from the back; deveining mainly involves large and medium shrimp), and packed in cartons or plastic bags. Some U.S. processors import individually frozen shrimp in bulk, partially reprocess them and repack them in retail-size containers as a domestic product.

Peeled cooked shrimp are marketed as fresh in bulk, individually frozen in cans or plastic bags, or frozen in blocks in cartons. Domestic processors supply nearly all of U.S. consumption. The major production is individually frozen warm-water shrimp in plastic bags prepared

from imported frozen blocks of raw peeled shrimp. The processors add flavor to most of this shrimp by cooking the shrimp in water containing additives such as sugar, onion powder, spices, and monosodium glutamate. Other cooked shrimp prepared from imported blocks are unflavored or contain only added salt. Domestic processors of peeled, cooked, cold-water shrimp use domestically caught shrimp which they cook in the shell. After peeling, salt may be added. Retail packages designate the origin of the shrimp ("Northern Pacific," "Maine," and so forth); this item sells at higher prices than those for cooked warm-water shrimp of comparable size. Cooked cold-water shrimp are frozen both individually and in blocks, whereas cooked warm-water shrimp are virtually all frozen individually. A few firms in the gulf area use domestically caught shrimp mainly, which they pack in hermetically sealed cans and then freeze.

Most canned shrimp are packed in cans containing about 4-1/2 ounces drained weight each. Sizes of canned shrimp range from colossal to tiny. The output of the Pacific States is virtually all tiny, though some is medium, whereas that produced in the Southeastern and Gulf States is more in the small and medium sizes and, to a lesser extent, in the tiny, large, jumbo, and colossal sizes. Imports, mainly from Asia, are mostly in the small and medium sizes, and their quality is generally comparable to that of the domestic product, although at times sizable amounts fail to pass inspection of the U.S. Food and Drug Administration. Imports from northern Europe are tiny shrimp packed in jars; they sell as gourmet items.

The Gulf and South Atlantic States produce a variety of shrimp products, including peeled shrimp, canned shrimp, frozen, cooked-and-peeled shrimp, and breaded shrimp. Breaded shrimp is the major product. It is produced from domestic fresh and frozen shrimp and from imported frozen shrimp. Most of the breaded shrimp are packed in retail-size containers (6 to 32 ounces); the remainder are packed in large containers for the restaurant and hotel trade.

Five-pound blocks of cooked-and-peeled Pacific shrimp meat, produced primarily in Alaska, are sold to restaurants or are thawed in supermarkets and fish markets and sold by the pound. Thirty-pound bags of individually frozen cooked-and-peeled shrimp go to restaurants or are exported. There is a small production of premium-quality frozen cooked-and-peeled shrimp in 5-pound cans for the institutional trade. A few producers also prepare some frozen raw peeled shrimp in large blocks to be processed into shrimp specialties such as shrimpburgers and extruded shrimp products. Some of the cooked Alaska shrimp meat is packed in frozen blocks in 4- and 6-ounce cartons for the retail trade. Pacific shrimp are marketed throughout much of the United States, but because of consumer preference for larger sizes and the availability of imported tiny size tropical shrimp at lower prices, a large part of the Pacific shrimp are consumed in the Far West, where there is a long-established market for the product.

U.S. Tariff Treatment

Shrimp imported into the United States have historically been free of duty. Under the Tariff Schedules of the United States (TSUS), shrimp are provided for under item 114.45. The duty-free status of peeled shrimp in airtight containers (item 114.4550) and other peeled shrimp if dried or cooked, but not breaded (item 114.4562 pt.) is bound as a result of concessions granted by the United States in the sixth round of trade negotiations (Kennedy Round) under the General Agreement on Tariffs and Trade. The duty-free status of shrimp in other forms is not bound. Imports that enter in the forms for which the duty-free treatment is bound account for only a small part of the U.S. imports of shrimp.

Shrimp caught by U.S.-flag vessels and landed in the United States by the taking vessels are considered to be domestic production whether the shrimp were caught in U.S. waters, on the high seas, or in foreign waters where such vessels have the right to fish. Foreign fishing craft are not permitted to land their catch of shrimp in the United States (46 U.S.C. 251). Shrimp caught by U.S.-flag vessels in international waters, whether landed directly in the United States or landed in a foreign port for transshipment to the United States, are eligible for free entry under item 180.00 which provides in part as follows:

> Products of American fisheries (including . . . shellfish . . .), which have not been landed in a foreign country, or which, if so landed, have been landed solely for transshipment without change in condition.

The term "American fishery" is defined in headnote 1 of part 15A of schedule 1 of the TSUS as "a fishing enterprise conducted under the American flag by vessels of the United States on the high seas or in foreign waters in which such vessels have the right, by treaty or otherwise, to take fish or other marine products and may include a shore station operated in conjunction with such vessels by the owner or master thereof."

As a practical matter, most of the shrimp caught by U.S. vessels in international waters are landed directly in the United States as domestic production and are not entered under item 180.00. Significant quantities of shrimp caught by U.S. vessels, however, are landed in foreign ports, where they may be washed, graded, and frozen and then shipped to the United States. Such shrimp are commonly entered free of duty under item 114.45 as foreign merchandise because it is uncertain, in some cases, whether the shrimp are eligible for entry under item 180.00 and because it is simpler to clear them through customs under item 114.45 than under item 180.00. Should duties or quotas be imposed on imports under item 114.45, however, the question of the requirements for free entry of shrimp under item 180.00 would become important. Whether or not shrimp could be entered under item 180.00 as "products of American fisheries" would depend on a number of factors, including the registry of the catching vessels, the ownership of the shore stations in foreign ports, and whether or not the shrimp were "changed in condition" at the shore stations abroad.

The Question of Increased Imports

U.S. imports of shrimp which are fresh, chilled, frozen, prepared or preserved, including pastes and sauces, enter the United States under TSUS item number 114.45. Imports entering under this TSUS item number represent a very broad range of sizes and species of shrimp, as well as various differences in processing. Developing nations supply the bulk of U.S. shrimp imports, notably Mexico, which is a primary producer and exporter in the world market.

This section will present the facts relating to the question of increased imports. The analysis will consider the absolute increase or decrease in imports for various categories of product at different time periods, as well as factors which affect imports. The ratio of imports to production and consumption will also be discussed.

U.S. Imports

Aggregate in all forms

Total imports of shrimp in all forms increased from 198 million pounds (heads-off basis) in 1968 to 218 million pounds in 1970, declined to 193 million pounds in 1971, and then rose erratically to 252 million pounds in 1974. The average annual rate of increase was approximately 5 percent during this period. Imports in 1975 amounted to 216 million pounds, down 36 million pounds, or 14 percent, from a year earlier, as shown in the table on page A-13.

Shrimp: Estimated U.S. beginning stocks, landings, imports for consumption, exports, and apparent consumption, average 1960-64, annual 1965-75

(Heads-off weight)

Period	Beginning stocks 1/	Landings	Imports	Total supply	Exports	Apparent consumption	Ratio of imports to--	
							Production	Apparent consumption
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent
Average 1960-64	43	131	144	319	17	257	110	56
Annual:								
1965	46	152	171	369	24	306	112	56
1966	38	148	184	370	26	302	124	61
1967	42	190	186	418	34	326	98	57
1968	58	184	198	440	26	358	107	55
1969	56	195	200	450	39	349	102	57
1970	63	225	218	506	47	386	97	56
1971	72	237	193	502	47	385	81	50
1972	70	234	237	541	42	406	101	58
1973	93	225	210	527	58	390	93	54
1974	79	224	252	555	39	440	112	57
1975	76	208	216	500	38	415	104	52

1/ Beginning stocks are the quantity of shrimp held in public and major private warehouses and cold storage on Jan. 1 of each year; beginning stocks for 1976 were estimated at 47 million pounds.

Source: Compiled from official statistics of the National Marine Fisheries Service of the U.S. Department of Commerce, except as noted.

Note.--Data shown calculated from the unrounded figures. Data do not agree with those in certain other tables in this report because all data in this table have been converted to heads-off basis. Import and export figures have been adjusted to allow for exports of foreign merchandise and for U.S. shrimp that is exported and subsequently reimported into the United States.

The foreign value of imports of all forms of shrimp has increased almost steadily from 1968 to 1974, as shown in the table below. The foreign value of imports in 1974 was $387.3 million, more than double the 1968 value of $162.2 million. The value of imports increased more than $100 million from 1973 to 1974. In 1975, owing to a large decrease in the quantity of shrimp imported in 1975 from that imported in 1974, the value of imports in 1975--$346 million--fell below the figure for 1974 but remained above that for 1973.

Shrimp: Foreign total value and foreign unit value of U.S. imports, average 1960-64, annual 1965-75

Period	Value	Unit value 1/
	1,000 dollars	Per pound
Average 1960-64	85,449	$0.57
Annual:		
1965	113,754	.64
1966	143,129	.73
1967	150,776	.75
1968	162,166	.77
1969	174,886	.80
1970	200,035	.81
1971	196,294	.92
1972	250,331	.99
1973	281,541	1.23
1974	387,336	1.42
1975	346,230	1.50

1/ Based on heads-off weight.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Shrimp are imported in several forms, according to the degree of processing which has taken place. The following table shows a breakdown of imports in 1975 within TSUS item number 114.45, depicting the five basic categories under which shrimp are imported.

Shrimp: U.S. imports for consumption, by types, 1975

TSUSA item	Description	Quantity	Value	Unit value	Percent of total value
		Million pounds	Million dollars	Per pound	
114.4545	Shell-on	117.2	222.1	$1.89	64
114.4550	Peeled, in airtight containers	1.1	1.7	1.50	1/
114.4557	Peeled, raw, not in airtight containers	76.7	113.7	1.48	33
114.4562	Peeled, cooked, not in airtight containers	5.2	6.7	1.28	2
114.4572	Breaded shrimp	1.2	2.1	1.72	1

1/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce.

In terms of value, the majority of shrimp imports enter the United States as shell-on shrimp, while about one-third enter as raw peeled shrimp not packed in airtight containers. Imports of shrimp in each of the three remaining categories rarely account for as much as 5 percent of total imports. Unit values, which ranged from $1.28 per pound to $1.89 per pound in 1975, vary according to the availability of the product, the size of the shrimp, the extent of processing, and the type of buyer.

Imported shrimp are distributed throughout the United States. The bulk of the imported shrimp are distributed through the ports of New York, Miami, Los Angeles, and various ports in Texas. Imports from Asia and

South America enter the United States principally through New York, while imports from Mexico generally enter through Arizona, Texas, and California ports.

Table 1 in the appendix presents the total quantity of shrimp imports by country. Mexico and India are the leading sources of shrimp for the United States, with various other countries in Central and South America providing significant supplies. In 1974, countries in the Middle East exported shrimp in increased quantities to the United States, but failed to maintain these increased amounts in 1975.

Tables 2 to 11 in the appendix depict imports of several types of shrimp by country. Mexico is the major source of imported shell-on shrimp; raw, peeled shrimp not in airtight containers; and breaded shrimp. India is the primary source of imported peeled shrimp in airtight containers, while Taiwan is the leading supplier of other shrimp not in airtight containers.

Seasonal periods of entry

Imports of shrimp enter the United States in substantial volume throughout the year, but they are usually heaviest during the October-January period (table 12). Imports of shrimp during this period may be as much as double the amount of imports at other times of the year. One exception to this general rule is breaded shrimp, which is imported primarily in the first 3 months of the year, owing to the extent of processing which has taken place.

The Ratio of U.S. Imports to Production

During the period 1965-74, the ratio of U.S. imports of shrimp to domestic production ranged between 81 percent in 1971 and 124 percent in 1966, as shown in the following table. In 1975, imports were equivalent to 104 percent of production. The high percentage for 1974 (112) was due to the combined action of increased imports, which rose from 210 million pounds in 1973 to 252 million pounds in 1974, and a decrease in domestic landings from 225 million pounds in 1973 to 224 million pounds in 1974.

Shrimp: Ratio of U.S. imports to U.S. production, 1965-75

Year	Imports	Production	Ratio of imports to production
	Million pounds	Million pounds	Percent
1965	171	152	112
1966	184	148	124
1967	186	190	97
1968	198	184	107
1969	200	195	102
1970	218	225	97
1971	193	237	81
1972	237	234	101
1973	210	225	93
1974	252	224	112
1975	216	208	104

Source: Compiled from official statistics of the U.S. Department of Commerce.

The Ratio of U.S. Imports to Consumption

During 1965-74, the ratio of U.S. imports of shrimp to apparent U.S. consumption ranged from 50 percent to 61 percent; in 1975, imports were equivalent to 52 percent of apparent consumption, as shown in the table on the following page. The ratio of imports to apparent consumption

decreased in 1975 as a result of a decrease in imports which was greater than the decrease in apparent consumption.

Shrimp: Ratio of U.S. imports to apparent U.S. consumption, 1965-75

Year	Imports	Apparent consumption	Ratio of imports to apparent consumption
	Million pounds	Million pounds	Percent
1965	171	306	56
1966	184	302	61
1967	186	326	57
1968	198	358	55
1969	200	349	57
1970	218	386	56
1971	193	385	50
1972	237	406	58
1973	210	390	54
1974	252	440	[illegible]
1975	216	415	52

Source: Compiled from official statistics of the U.S. Department of Commerce.

U.S. Importers

U.S. importers of shrimp number approximately 250 major firms within the country. These importers are traders or processors that buy and sell various forms of shrimp according to conditions in the market. The importer may also function as a distributor that either places the imported shrimp in storage for future resale or arranges direct delivery of imported shrimp to the consumer that placed an order. Many importers also buy domestically produced shrimp in order to accommodate customer demand. The importer must supply an assortment of sizes and species. Thus, importers most often purchase shrimp at prices offered by the seller, although at times negotiations between the two parties can take place prior to contracting, and this allows the importer to buy the shrimp at less than the price initially offered.

A few major importing companies own facilities in foreign shrimp-producing countries. One firm has two facilities, one in Costa Rica, and the other in French Guiana; another company has one in Guyana, while still another has facilities in Guatemala.

Imports of shrimp from Mexico are purchased primarily by U.S. subsidiaries of the Mexican company, Productos Pesqueros Mexicanos. Imports of shrimp from Asia and Africa are entered for the most part by New York-based firms.

Factors Affecting Imports

Among the principal factors that have contributed to U.S. imports of shrimp in recent years are the following:

(1) The world supply of shrimp has increased the availability of imported shrimp nearly every year since the mid-1960's. According to Food and Agriculture Organization data, the world catch increased from about 1.5 billion pounds in 1965 to about 2.7 billion pounds in 1973, or about 80 percent in this period. Increased demand and generally rising prices have facilitated increased production from many existing fisheries and encouraged the development of new processing plants.

(2) The United States and Japan are two of the leading importers of shrimp. Thus, an increase or decrease in the demand for shrimp by Japan will affect the availability and price of shrimp in the United States. The table below presents U.S. and Japanese import statistics for 1971-74.

Shrimp: Imports by the United States and Japan, 1971-74

(In thousands of pounds, product weight)

Item	1971	1972	1973	1974
Imports from India:				
United States	22,779	33,524	20,553	31,378
Japan	21,389	28,245	48,287	39,742
Imports from 5 major Asian sources:				
United States	6,424	17,370	14,068	20,165
Japan	62,675	75,692	95,038	72,227
Imports from all other countries:				
United States	162,101	172,332	167,984	177,369
Japan	89,882	90,332	115,658	109,923
Total imports:				
United States	191,318	223,226	202,562	228,911
Japan	173,886	194,269	258,983	227,759

Source: Compiled from official statistics of the U.S. Department of Commerce.

(3) Imports of shrimp from Mexico, which serve as a primary source of supply for major U.S. shrimp processors or retail sources, are facilitated by existing channels of distribution and ready financing.

Foreign Production

The Food and Agriculture Organization of the United Nations provides annual catch statistics for world areas. The following table indicates that world production of shrimp has steadily increased from 1965 to 1973. Landings in 1974 are believed to have increased, but estimates of world production of shrimp in 1975 are considered to be lower than those in 1974. World production of shrimp is primarily developed in the Atlantic and Pacific Oceans although production in the Indian Ocean has increased significantly.

Shrimp: World production, by area, 1965-73

(In millions of pounds)

Area	1965	1966	1967	1968	1969	1970	1971	1972	1973
Atlantic, North	189.8	198.0	169.8	188.1	194.4	220.0	187.2	190.5	200.0
Atlantic, Central	324.1	300.1	362.2	349.9	351.0	400.8	415.1	442.9	386.5
Atlantic, South	88.4	77.8	82.2	95.5	91.5	91.5	95.7	99.4	112.2
Total Atlantic	602.3	575.9	614.2	633.5	636.7	712.3	698.0	732.8	698.7
Mediterranean and Black Sea	35.9	30.9	34.1	33.1	25.1	26.7	27.6	26.2	29.5
Indian Ocean	257.5	294.1	309.1	335.8	356.3	404.3	454.8	483.1	585.3
Pacific, North	259.0	272.5	300.1	313.5	309.8	328.3	335.6	288.1	341.1
Pacific, Central	358.7	412.0	473.3	487.7	528.0	582.2	680.1	700.6	761.0
Pacific, South	18.3	30.0	26.4	29.1	25.4	26.2	26.0	27.8	15.6
Total Pacific	636.0	714.5	799.8	830.3	863.2	936.7	1,041.7	1,016.5	1,117.7
Total world	1,531.7	1,615.4	1,757.2	1,832.7	1,881.3	2,080.0	2,222.0	2,258.6	2,431.2

Source: Compiled from official statistics of the Food and Agriculture Organization of the United Nations.

Mexico

Mexico has been the primary source of imports since before World War II. However, over the years,that country's share of total U.S. imports has declined. In the early 1950's Mexico accounted for virtually all of the imports, but by the end of that decade her share of the imports had dropped to about two-thirds of the total. Mexico's share continued to decline, and during 1972-74 Mexican shrimp accounted for about one-third of the imports.

U.S. imports from Mexico begin to increase at the beginning of the west coast shrimping season about the first of September. At that time, the shrimp come into the bays on the west coast of Mexico and are caught with throw nets, then taken the same day to be frozen into 5-pound blocks. The largest crops of shrimp are harvested from September through December (after which the bays are closed to fishing and the catch by boats outside the bays tapers off). Imports of shrimp are also supplied from September to June by fishing boats along the west coast of Mexico. The season is usually closed along most of the west coast in July and August. Shrimping on Mexico's east coast is year round, but production is small compared with that on the west coast.

As a result of improvements in shrimp resources, Mexican landings increased 9 percent during the first 6 months of 1975 over those in the corresponding period of 1974. Projections for 1975 landings are 101 million pounds, with landings for the second half of the year expected to reach 65 million pounds. Of this quantity, 80 percent, or 52

million pounds, is expected to be shipped to the United States, about 4 percent more than in the corresponding period of 1974.

India

Reports from the Department of Commerce in mid-1975 after the end of the Indian fiscal year (IFY, April 1 to March 31) indicated that India's shrimp exports had declined drastically since October 1974 and that signs of future recovery were few. Indian exports of marine products, which had reached a high level of 114.7 million pounds, valued at $115 million, in IFY 1973-74, were expected to decline as much as 30 percent in IFY 1974-75. A sharp decrease in the shrimp catch on both the east and west coasts of India and an expected decline in purchases by the United States and Japan were the principal reasons for the decline in export trade. Since July 1975 both the shrimp catch and the demand from principal markets have been better than expected; however, the Indian shrimp industry has not recovered from the reverses suffered in 1974.

For a few years, Indian shrimp sold for relatively high and stable export prices. In 1974 this situation was reversed. U.S. demand for Indian shrimp was reduced as inventories in the United States grew. Moreover, the U.S. Government imposed more stringent sanitary control requirements, which many smaller Indian producers could not meet. Increases of as much as 40 percent in freight rates to the United States and decreasing U.S. prices discouraged Indian exports of shrimp.

Indian shrimping operations in the early part of 1975 were hampered by a decrease in the catch on both coasts. The catch off Maharashtra State decreased to a daily average of about 11,000 pounds in November 1974 from a daily average of 88,000 pounds in October 1974 and had not increased perceptively by mid-1975. The catch in major shrimping areas of the west coast declined by 50 percent or more in IFY 1974-75. East coast catches had also declined. Overfishing in shallow waters and the scanty 1974 monsoon were believed to be the major causes for the decline. In the second half of 1975, the total shrimp catch increased but not sufficiently to reach recent high levels.

Indian fishing companies were adversely affected by the IFY 1974-75 shrimp situation. Profits declined for many Indian fishing companies and seafood processors. Several shrimp-processing plants and refrigerated warehouses closed, and in mid-1975 only about 25 percent of the processing capacity was being utilized. Costs in trawling operations also increased as the price of diesel oil, spare parts, equipment, and labor rose. Since less than 20 percent of the more than 400 firms with fishing operations were well-capitalized companies, nearly 70 percent of the smaller processors and exporters went out of business, while few large firms made any profit in shrimp exports. Since mid-1975, the economic situation in India's shrimping industry has improved; however, information received from Department of Commerce sources indicates that few operations which were discontinued in IFY 1974-75 have resumed functioning.

Other sources of foreign production

Owing to a February-March 1975 ban on fishing in Panama to allow the shrimp to mature, the 1975 catch was expected to increase 10 percent. As a result, exports from Panama to the United States in 1975 were expected to increase above the 10 million pounds recorded for 1974; however, such exports declined slightly in 1975. Increased exports for 1975 were recorded for Ecuador, since that country exported a total of almost 4 million pounds of shrimp in January-June 1975--785,000 pounds more than it exported in the corresponding period of 1974. Virtually all its shrimp exports were sent to the United States. The Taiwan Provincial Fisheries Bureau reported that Taiwan's shrimp catch for 1975 was expected to reach 121 million pounds, based on catch figures recorded early in the year. The estimated 1975 shrimp catch is about 10 percent greater than the 1974 total of 110 million pounds. Exports of shrimp were hampered by a Taiwan governmental ban on the use of borax to keep the shrimp fresh. U.S. imports from Taiwan in 1975 equaled 5.6 million pounds, more than in 1974.

In the first quarter of 1975 the Indonesian shrimp catch has reportedly declined, and Indonesian Government and shrimp industry sources believe that the late 1975 shrimp catch was below the corresponding 1974 catch. The decline in the 1975 catch, according to a government source, has been caused primarily by overfishing in Indonesia's major source of export shrimp, the Arafura Sea. A decrease in the average size of shrimp in 1975, as well as in the total catch, reinforces this theory. Lower than normal water temperatures in the Arafura Sea, which limit shrimp reproduction, provide another possible reason for the decline in shrimp landings.

The Question of Serious Injury or Threat Thereof to the Domestic Industry

U.S. Producers

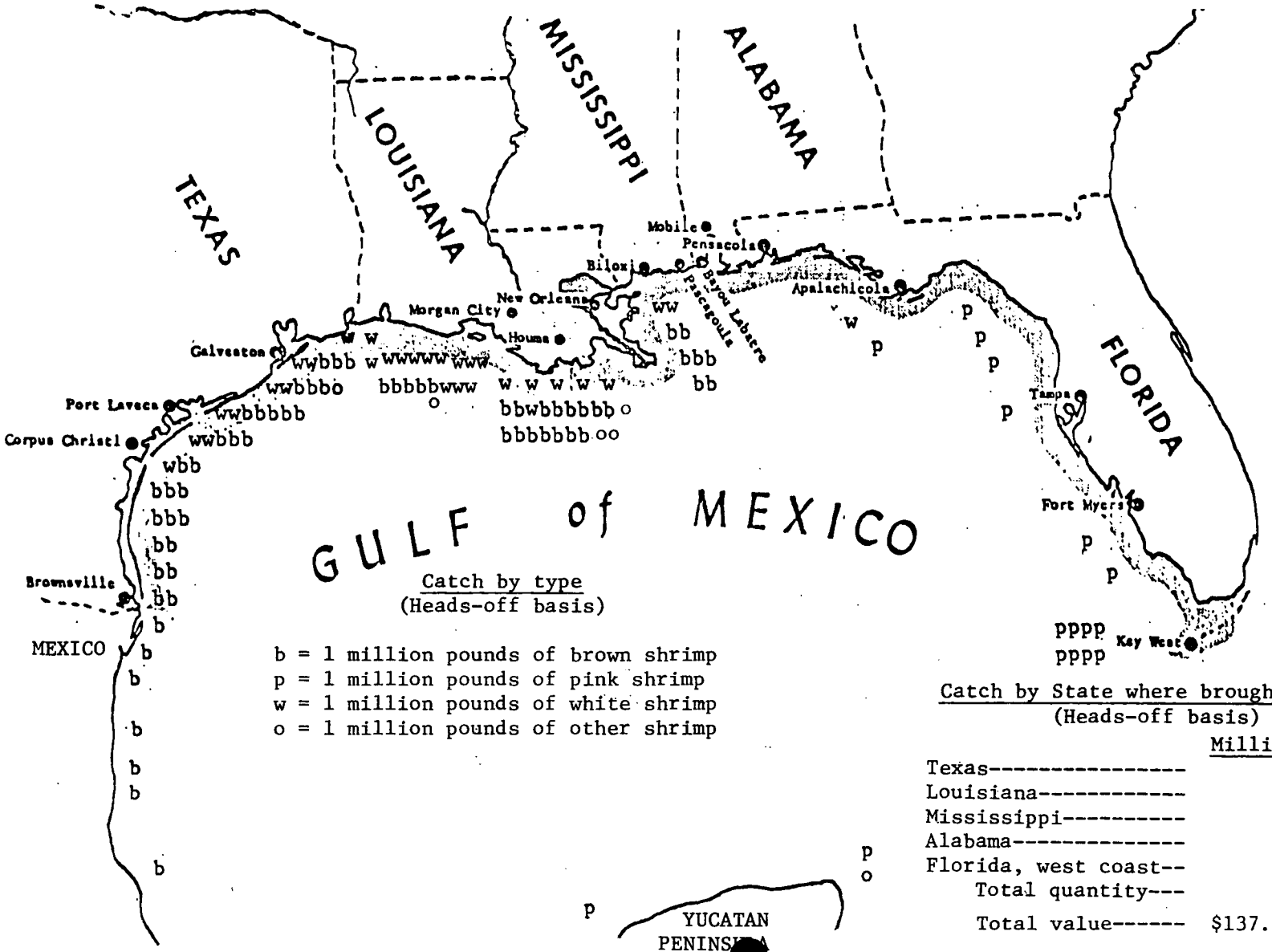
Fishermen in the Southeastern States account for the major part of the domestic catch of shrimp, and that area also includes the principal processors of shrimp. Shrimp fishermen and processors are also located in the Pacific States, including Alaska. Relatively minor producers, in terms of output, are those in the New England States. Figures 1 to 4 show the principal U.S. areas of production.

Most processors in shrimp-producing regions rely to some degree on domestically caught shrimp for their raw material. Many small firms in the smaller fishing ports use domestically caught shrimp entirely. A few firms, particularly in the highly populated areas of California and the Northeast, use imported shrimp almost exclusively.

Southeastern producers

The fishing fleet.--The southeastern shrimp-fishing industry, operating from North Carolina to Texas, includes an estimated 10,000 fishing craft. Shrimp are caught by various types of craft and fishing gear, but more than 98 percent are caught by shrimp trawlers. The fleet consists of about 5,000 large craft (of more than 5 net tons each) and about 5,000 small craft. The large craft have two- to three-man crews, whereas the small craft are normally operated by only one person. About 3,000 of the large craft fish for shrimp the year round and account for the vast bulk of the landings. The remainder, including virtually all of the small craft, fish for shrimp only on a part-time

Figure 1.--U.S. shrimp catch in Gulf of Mexico, by type of shrimp and by State where brought ashore, 1974.



Catch by State where brought ashore
(Heads-off basis)

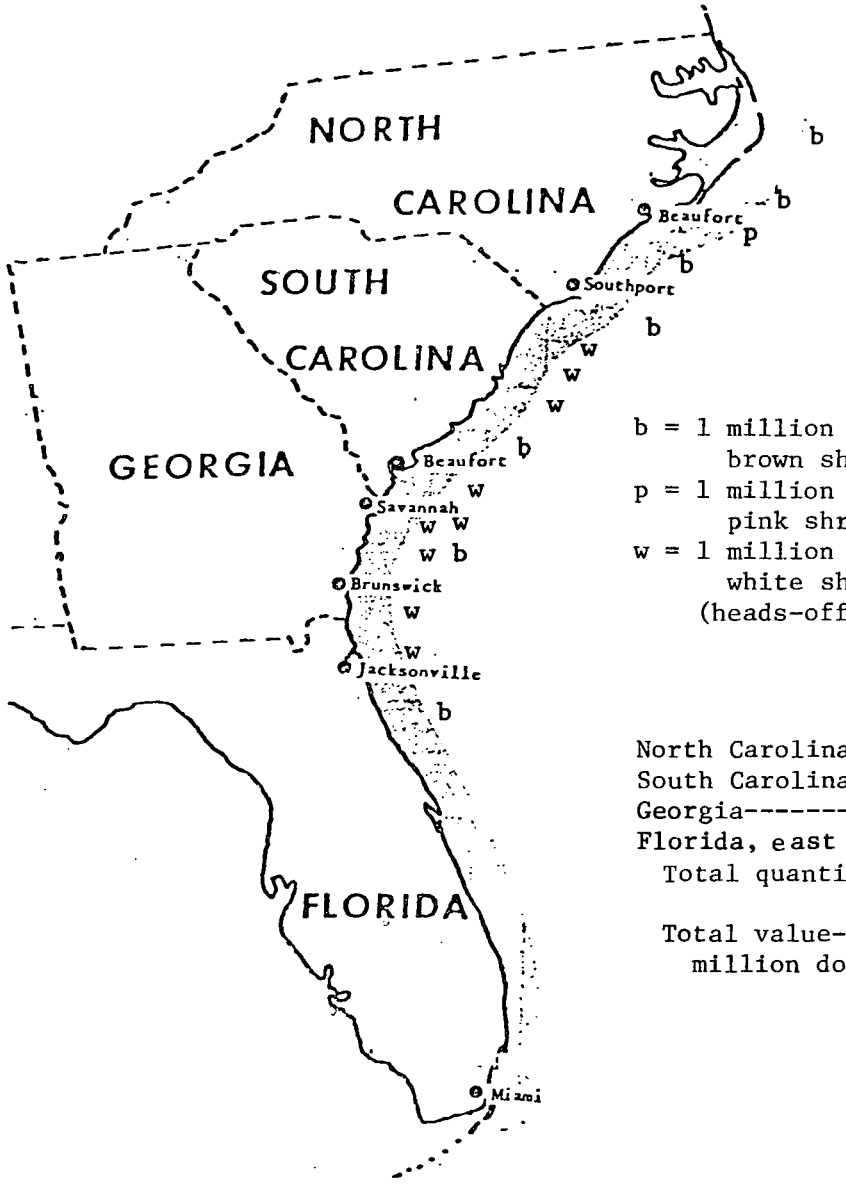
	Million pounds
Texas	49.4
Louisiana	37.9
Mississippi	3.3
Alabama	8.7
Florida, west coast	17.7
Total quantity	117.0
Total value	$137.6 million

Source: Gulf Coast Shrimp Data Annual Summary, 1974, National Marine Fisheries Service.

basis--usually when shrimp are at peak abundance in nearby waters. Many new large craft were added to the shrimp fleet in 1972 and 1973, following a period of above-average landings and favorable prices. Construction of new trawlers then almost stopped as costs of operation increased and financial returns declined. A new trawler, fully equipped, would cost nearly $200,000 in 1976. The fleet is generally modern and well-equipped, although owners say the craft are not maintained as well now as they would like.

Full-time shrimp trawlers fish out of their home ports the year round or migrate to wherever the shrimp are seasonally abundant. The winter months are generally the peak season for the grounds off southwestern Florida and for some grounds off the coast of Mexico. The peak months for the other coastal waters are in the summer and fall. The principal waters offer virtually no alternative fishing opportunities when shrimp fishing is poor. During parts of 1974 and 1975, when operating costs were high and shrimp prices were low, many of the larger craft did not operate. At times there was a problem in obtaining fuel. Also, during recent years, many shrimp trawlers left the fleet--either through attrition, or to trawl off the Atlantic or Pacific coasts for various fish or shellfish, or to join the shrimp fleets of foreign countries. While the gulf waters provide shrimp fishing the year round, shrimp fishing off the Carolinas, Georgia, and east Florida (see fig. 2) virtually ceases during the winter. Aside from doing a little shrimp fishing off Georgia and east Florida, the boats either tie up or move to southwestern Florida--depending on the adaptability of the

Figure 2.--U.S. shrimp catch landed in the South Atlantic States, by States, 1974.



	Million pounds
North Carolina--------	5.2
South Carolina--------	4.8
Georgia---------------	4.7
Florida, east coast---	2.5
Total quantity------	17.2
Total value-- million dollars--	18.1

Source: Shrimp Landings, Annual Summary, 1974, National Marine Fisheries Service.

individual boat and crew. Before operating costs rose sharply in 1973-74, it was commercially feasible for many of these Atlantic craft to catch fish or crabs in the winter. During the regular shrimp season in the Atlantic waters, these craft land nominal amounts of fish for commercial sale while fishing for shrimp. Gulf shrimp vessels, on the other hand, only catch negligible amounts of fish of commercial value.

In a typical shrimp-trawling operation, the craft tows a pair of large nets over the sea bottom. Periodically, the catches are dumped on the deck. The crew breaks the "heads" off the shrimp by hand and dumps them overboard along with miscellaneous fish 1/ and debris that the net has collected. The crew then usually packs the beheaded shrimp in ice in the hold, although some craft freeze the shrimp. During periods of heavy production or when the shrimp are very small, the beheading operation is omitted. In fishing off the Yucatan Peninsula of Mexico, and occasionally off northern Mexico south of Texas, the vessel that does not freeze shrimp may transfer its catch to another fishing vessel that is returning to port. Thus, on the return from the Mexican coast, a craft may carry the catches of several other vessels. The individual trip to the Yucatan grounds can last more than 40 days. Vessels out of Tampa and Fort Myers, Fla., operate on the eastern side of the Yucatan Peninsula, and vessels out of the Brownsville, Tex., area operate on the western side of the Yucatan Peninsula. Brownsville craft also fish along the coast of Mexico south

1/ For every pound of shrimp caught the fishermen may discard several pounds of worthless fish.

of Texas. Recently announced claims to 200-mile fishing zones by both the United States and Mexico are expected to have no major impact on shrimp fishing. The two countries are considering reciprocal arrangements to permit continued fishing off each other's coasts.

A craft that fishes in waters near its home port typically delivers its catch the same day. When fishing further from port, a trip may last a week or more. Shrimp vessels with freezing equipment often stay out for several weeks.

Shrimp vessels may be owned and operated individually (often by the vessel's captain), or they may be owned and operated in fleets. One owner may operate several vessels, or several owners may operate a fleet jointly through a manager. Sometimes vessels are owned by processors, packinghouses, and by individuals not otherwise involved in the shrimp industry.

Packinghouses.--Most shrimp catches are landed at packinghouses, commonly known in the trade as fish houses or shrimp houses. More than 100 of these packinghouses along the southeastern coast provide an unloading service for shrimp craft. They usually also perform other services, such as beheading, washing, grading, weighing, and packing in ice for shipment to various outlets. Most of the packinghouses are small establishments. The owners generally have other interests, such as ownership in one or more shrimp craft, a fuel-and-ice supply business, or a trucking service. In addition, packinghouses frequently advance credit to

vessel owners and keep the account books for shrimp craft owned by others. Many of the packinghouses are affiliated with shrimp-processing firms.

The packinghouse usually delivers shrimp to a few regular customers, such as breaders, freezers, canners, or wholesalers of fresh shrimp. Many of the packinghouses do not grade shrimp into sizes but simply pack them in ice in trucks for delivery. Some packinghouses hold a small supply of frozen shrimp in cold storage as a reserve for the off-season.

Freezers.--More than 75 southeastern concerns have as their primary function the freezing of heads-off, shell-on shrimp. Many of these concerns also operate shrimp-vessel unloading facilities. The major share of their frozen shrimp go to the restaurant trade; the remainder go mainly to breaders which process it into frozen breaded shrimp or into frozen peeled shrimp. A small portion of them go to retailers.

In a typical freezer operation, heads-off, shell-on shrimp are graded and packed loose (jumble-packed) in cardboard cartons containing slightly more than 5 pounds net weight. The cartons of shrimp are frozen in either a blast freezer or a plate freezer. Operators of freezers often perform their service for others for a fee of about 11 or 12 cents per pound, including 1 month's storage.

A number of shrimp freezers in the Southeast went out of business during 1974-75. In addition to financial losses resulting from the 1974 price drop, a fall-off in volume was experienced by this type of operation at many ports because of reduced landings.

Breaders.--About a dozen major plants and a number of minor plants produce breaded shrimp in the Southeast. In addition, these plants

account for almost all of the production of peeled shrimp in this area. They also produce some frozen, shell-on shrimp. Most of them process other seafoods as well, such as oysters and crabs, but shrimp is by far their main item. The plants generally bread the small and medium-sized shrimp (counting more than 40 shrimp per pound) and peel the larger shrimp for the peeled-shrimp trade. While all sizes of shrimp are largely peeled by machine, there is much labor involved in inspecting and sorting the shrimp after they leave the machine.

Breaders prefer to use fresh shrimp, but almost all of them also use frozen shrimp to maintain their breaded-shrimp production on a year-round basis. In a given area, there are generally only a few months of the year in which fresh shrimp in the desired sizes are lan[redacted] in large volume by the domestic fleet. Breaders often have fresh shrimp trucked in to their plants from considerable distances. Fresh shrimp are not generally available from foreign sources. Breaders use imported frozen peeled shrimp, in addition to shell-on shrimp, as raw material for breaded shrimp. Some also ship fresh or frozen shrimp to Mexico to be peeled and then sent to their U.S. plants, where they process them into frozen breaded shrimp or into packaged frozen peeled shrimp.

During 1974-75, six major shrimp-breading plants ceased operation. The rising costs of labor and raw material apparently could not be met by raising the sales price of the breaded shrimp and of the peeled shrimp. They also suffered severe losses in the value of inventory of raw shrimp when prices dropped during 1974. Two plants resumed operation under new ownership, but apparently on a reduced scale.

One firm moved much of its equipment to a site in the Northeast, where it processes other seafoods as well as shrimp.

Canners.--About 20 plants in Louisiana and Mississippi account for all of the southeastern canned shrimp production. The shrimp canneries, mostly family-owned and operated, are rather small establishments. Although the principal product of almost all of the canneries is canned shrimp, many also produce canned oysters, and about three produce frozen peeled shrimp. Two firms operate pet food canneries in addition to their shrimp canneries; one of the two also produces both canned oysters and canned crabmeat. In recent years the production of canned shrimp has been down, and the production of canned oysters has been up.

The shrimp used for canning consist basically of fresh heads-on, shell-on shrimp from catches landed in the vicinity of the canneries. Some are trucked in from considerable distances. Small quantities of frozen shrimp (principally imported) are utilized, but when such shrimp are used, a lower yield and a less satisfactory product generally result. In the gulf area the canneries pack shrimp only part of the year, usually intermittently from April through December. Oyster canning is done only during a brief winter season.

Other shrimp processors.--About 20 small concerns, all in Louisiana, produce dried shrimp as their principal or sole product. Production is generally limited to spring and early summer.

A few concerns in the southeastern United States produce minor quantities of shrimp specialties--including shrimpburgers, and stuffed, salted, spiced, smoked, or pickled shrimp.

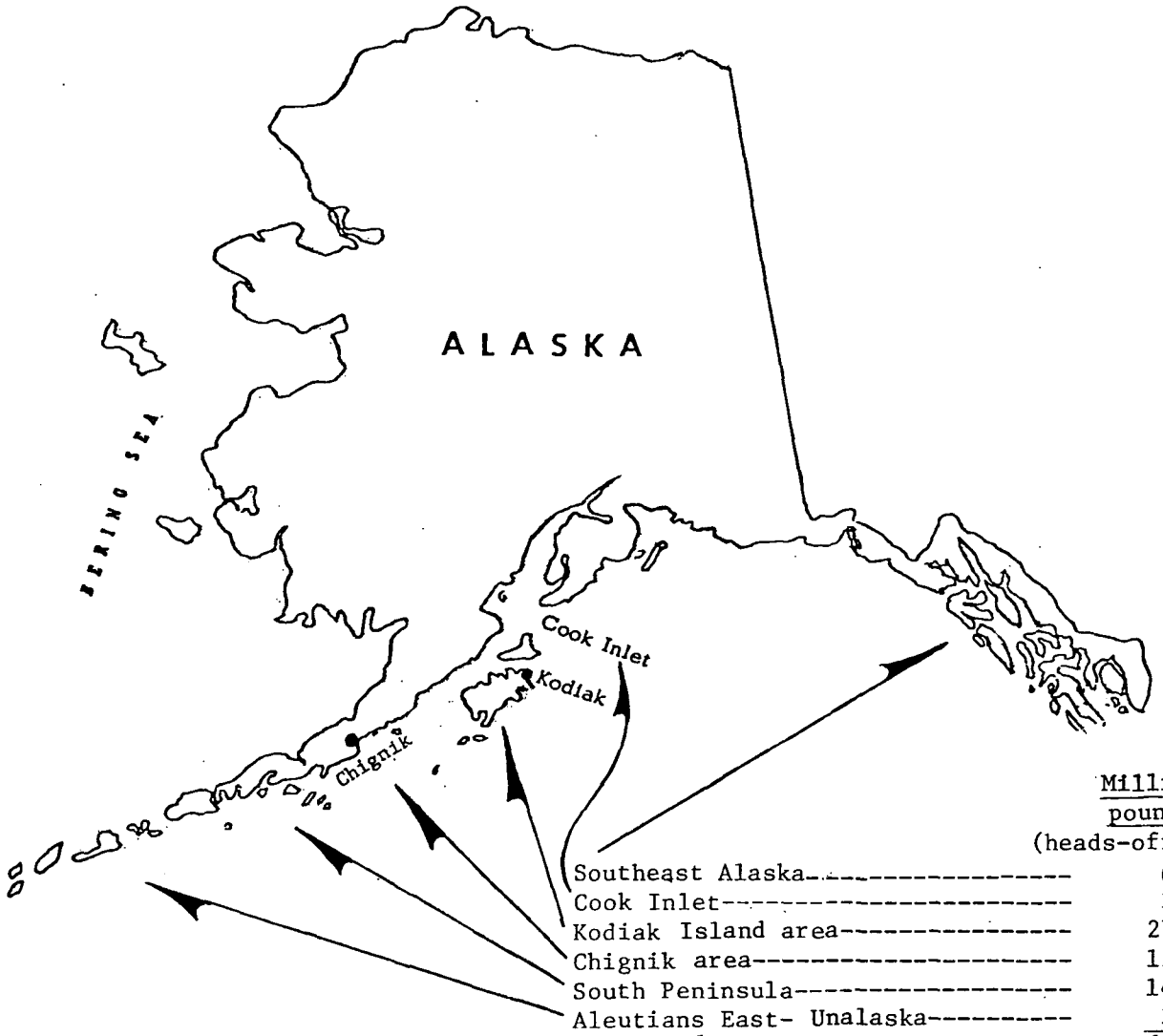
Four or five small firms, scattered from Florida to Texas, specialize in the production of frozen cooked, peeled-and-deveined shrimp in 2-pound and 4-pound cans. Sealed in a vacuum, the product keeps indefinitely, and it is protected against damage from handling. This item is consumed in seafood cocktails in restaurants, and it sells at a premium price.

Pacific producers

The fishing fleet.--The Pacific shrimp are taken by shrimp trawlers operating out of ports in Alaska and ports down along the other west coast States as far as northern California (figs. 3 and 4). The principal port is Kodiak, Alaska, and the second most important port is Chignik, to the west of Kodiak. About 100 craft account for the Alaska landings. About half of this fleet fishes for shrimp the year round, weather and price disputes permitting; the other half fishes for crabs during part of the year. Another 50 to 75 craft in Washington, Oregon, and California trawl for shrimp in the warmer months and for finfish in the colder months. About 30 or 40 of these craft fish for shrimp from March to November, and are considered to be full-time shrimp vessels. A few large boats go to Alaska for shrimp in the winter. The waters off Washington, Oregon, and California are closed to shrimp fishing in the winter for conservation purposes.

In Alaska, the most highly productive areas are subject to closure to shrimp fishing when the respective catches reach conservation-quota limits. The boats then operate in other waters. Major shrimp areas are

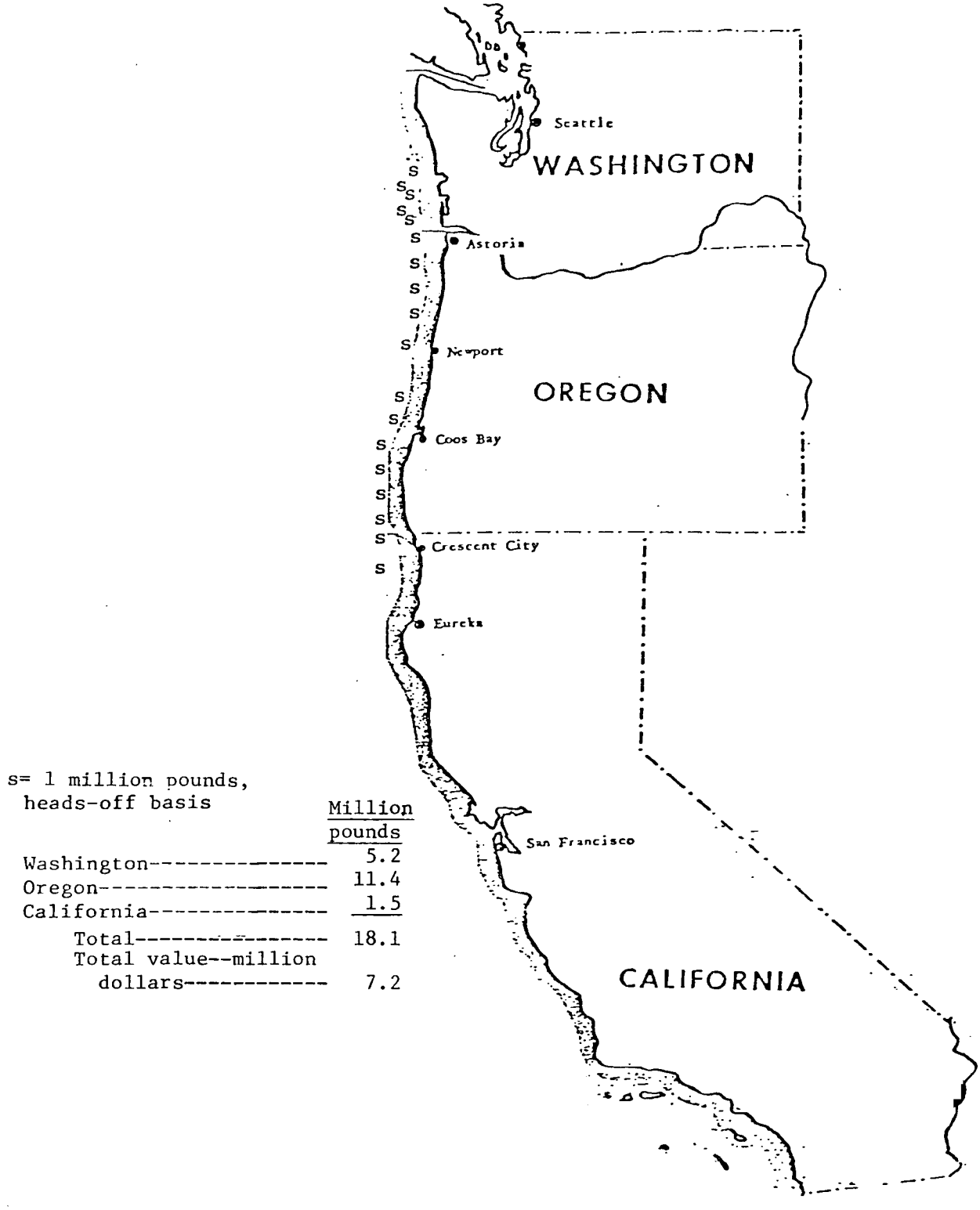
Figure 3.--U.S. shrimp catch off Alaska by area of capture, 1974.



	Million pounds (heads-off basis)
Southeast Alaska	0.7
Cook Inlet	3.3
Kodiak Island area	27.8
Chignik area	12.4
South Peninsula	14.5
Aleutians East- Unalaska	3.3
Total quantity	62.0
Total value--million dollars--	9.7

Source: Statistical Leaflet 27, Alaska Department of Fish and Game.

Figure 4.--U.S. shrimp catch landed in Washington, Oregon, and California, by States, 1974.



Source: Unpublished statistics of the National Marine Fisheries Service.

closed during the egg-hatching season in March and April, when the shrimp quality is undesirable. Also at this time the fleets often tie up while attempting to negotiate a price for the coming season.

The Pacific shrimp fleet includes some shrimp trawlers that formerly operated out of the Southeastern States, and it includes a variety of craft originally designed to fish in the Pacific for species other than shrimp. The Pacific shrimp craft have a wide range of sizes; they average larger than those that operate in the Southeast. A large new craft capable of fishing for crabs as well as shrimp in Alaska would cost about $700,000 in 1976. Shrimp fishing in the Pacific requires the expense of more gear than in the Southeast because the shrimp are found at much deeper levels. The special equipment for Alaska crab fishing adds further to the expense. Most Pacific shrimp trawlers carry three- or four-man crews; some small ones carry two men.

In Hawaii there is a negligible production of shrimp from the ocean and from pond culture for local consumption. Methods are being developed for major-scale shrimp culture in both fresh water and salt water in the United States, but to date the only commercially successful operations are those in Hawaii, where there is an advantage in having a year-round growing season.

Processors.--The Pacific shrimp industry centers in Kodiak, where several major processors maintain plants. The Pacific firms produce frozen cooked-and-peeled shrimp mainly and canned shrimp to a lesser extent. They also produce frozen, peeled, raw shrimp for shrimp-burgers and breaded extruded shrimp, and negligible amounts of frozen,

cooked whole shrimp. The larger firms produce both canned and frozen peeled shrimp. Some plants in Washington, Oregon, and California produce fresh, cooked-and-peeled shrimp for the west coast restaurant trade.

The larger Pacific shrimp processors process other seafoods as well as shrimp. In Alaska, the other items are principally crabs, salmon, and halibut. Many of the smaller shrimp plants process only shrimp.

New England producers

The New England shrimp industry includes about 150 to 200 trawlers and about a dozen plants that process their shrimp. The industry utilizes the same species of small shrimp that is landed in Alaska. The trawlers are medium-sized--mostly carrying crews of two; some carry three. This industry is currently only a seasonal operation (November-April). The trawlers and plants utilize groundfish (basic New England bottomfish, including cod, haddock, and pollock) the rest of the year. During 1969-74 this was a year-round operation for many boats and some processing plants. The industry is currently almost entirely in Maine, although many vessels in the fleet are registered in Massachusetts or New Hampshire. The shrimp migrate south to offshore Massachusetts each summer. Before 1975, when the fleet was landing shrimp in Massachusetts during the warmer months, the shrimp was processed in that State or it was trucked to plants in Maine for processing. In early 1975, the shrimp population declined, apparently as a result of natural factors; fishing for shrimp was halted for the summer and

early fall for conservation purposes. Shrimp fishing was permitted to resume in November and was closed again in April 1976.

Most of the New England shrimp are cooked, peeled, individually frozen, and packed in bulk for export to Europe. Some are individually frozen and packed in 1-pound plastic bags also for export to Europe. Other products are frozen, peeled, raw shrimp; frozen, cooked, shell-on shrimp; and fresh, cooked, shell-on shrimp. All forms of New England shrimp are consumed in New England to some extent. In 1974, when shrimp prices were down and the European economy was also down, some of the New England shrimp went into extruded shrimp products.

Processors away from the domestic producing areas

There are at least 30 shrimp breaders outside the domestic shrimp-producing areas of the Southeast, Maine, and Pacific Northwest (including the northwest corner of California). These firms generally use imported frozen shrimp for raw material. Some large plants are located near major population and import centers--including New York City, Boston, and Los Angeles. The others are mainly small plants located throughout the United States, including many in the interior. In addition to breaders, there are a few processors outside the areas of domestic shrimp landings that prepare products such as shrimp cocktail in jars, and cooked, peeled shrimp in plastic bags.

Characteristics of the U.S. shrimp-fishing fleet

The Commission obtained information on the nature and structure of the U.S. shrimp-fishing industry from responses to questionnaires of the Commission supplied by the owners of shrimp-fishing craft. While the primary information supplied in response to the questionnaire pertained to profit-and-loss (see section on profit-and-loss experience of boatowners), additional data were supplied on craft concerning size, value, ownership, and size of crew. The data were gathered from a very minor share of the shrimp-fishing industry but appear to be representative; the questionnaire coverage for this general information was more extensive than the coverage for profit-and-loss data.

One fact that developed from the study was that during 1971-75 many craft were held by an owner for only a year or two; turnover of ownership appeared to be very characteristic. Other reasons for a craft not being under one ownership during the entire 1971-75 period were that some craft in the survey were not built until after 1971 and others had sunk or were scrapped before 1975.

Questionnaires were sent to the owners of a selected sample of craft; to owners that testified at the Commission's hearings at Brownsville and Savannah; and to selected groups that were (1) believed to maintain good records on their craft in the gulf area and had not been otherwise listed to receive questionnaires or (2) situated in the west coast or New England areas--areas that were not well represented by returns from the selected sample.

The data, as shown in part in the table on the following page, indicate that--

1. Craft owned by witnesses who attended the Commission's hearings were considerably larger and of higher value than the average shrimp-fishing craft.
2. Gulf coast craft are much larger on the average than South Atlantic craft.
3. West coast craft have considerably higher average values than those of the other area groups, but their size is similar to that of the gulf vessels.
4. The New England vessels are much smaller than those in the other shrimp-producing areas.
5. The west coast craft are largest in average crew size, and New England craft are smallest.
6. About half of the U.S. shrimp-fishing craft in all areas except Maine are captain owned; the remainder are largely corporation owned (usually by a corporation concerned primarily with shrimp-vessel ownership).
7. The larger craft in the gulf and South Atlantic areas are operated in fleets. (A "fleet" usually ranges from 5 to 12 craft, but may be as large as 35.)

Shrimp vessels: Average net tonnage, average number in crew, average replacement value, and number that are part of a fleet, by group and area, as supplied in responses to questionnaires, 1970-75

Group, area, State, 1/ and number of craft	Average net tonnage	Average number in crew, including the captain	Average replacement value	Number of craft that are part of a fleet
Selected sample:				
Gulf: Tex., 34; La., 26; Fla., 11; Ala., 10; Miss., 2	45	2.5	$83,000	27
South Atlantic: S.C., 5; Ga., 4; Fla., 3; N.C., 2	30	2.6	75,000	4
New England: Maine, 1	22	2.0	60,000	-
West coast: Alaska, 3; Oreg., 1	54	3.2	293,750	2
Total (102) or average	43	2.5	90,000	33
Represented at hearings:				
Gulf: Tex., 159; Fla., 1	67	3.0	161,000	141
South Atlantic: Tex., 10; Ga., 5; Fla., 1	50	2.4	119,000	12
Total (176) or average	65	2.9	157,000	153
Selected groups:				
Gulf: Tex., 10; Fla., 1	63	3.0	95,000	11
West coast: Alaska, 9; Oreg., 9; Calif., 2	61	3.4	262,000	8
New England: Maine, 3	26	2.7	90,000	-
Total (34) or average	58	3.2	193,000	19

1/ The State where most landings were made in the latest year of operation; the State of landing may not necessarily correspond to the area of ownership.

Source: Compiled from data submitted to the U.S. International Trade Commission by the domestic industry.

U.S. Production

Landings of shrimp

The U.S. shrimp fishery is the most valuable fishery in this country. In the last decade, U.S. landings of shrimp increased erratically from 152 million pounds (heads-off basis) in 1965 to 237 million pounds in 1971 and then declined to 208 million pounds in 1975 (table on p. A-13). The 1975 landings were about 7 percent less than those in 1974.

The principal producing area is the Southeast (from North Carolina to eastern Texas), where Texas, Louisiana, and Florida are the major States (table on next page). Next is the Pacific States area, where Alaska accounts for three-fourths of the landings. During 1970-75 domestic landings of shrimp in the Southeastern States declined by about one-fifth. The sharpest drop, in terms of quantity, occurred in Louisiana, where landings declined by about two-fifths from what they had been in 1970. Meanwhile, the catch of shrimp in the Pacific States increased substantially, with 1974 landings in Alaska about half again as great as in 1970. The annual landings in the New England States dropped by about half during 1970-75.

The substantial decline in shrimp landings in the Gulf States was the result of low-crop years following a series of above-average crop years during 1970-72. Furthermore, fishing activities were reduced because of the aforementioned problems of rising operating costs and low shrimp prices.

Although shrimp are landed in the Gulf States throughout the year, the bulk of the landings are generally made during the months from June

Shrimp: U.S. landings, by regions and States, 1970-75

(In millions of pounds, heads-off basis)

Region and State	1970	1971	1972	1973	1974	1975
Gulf States:						
Texas	55.4	54.4	61.1	51.5	49.4	44.4
Louisiana	57.8	58.7	52.6	37.3	37.9	34.0
Florida, west coast	16.6	13.6	14.3	16.3	17.7	17.2
Alabama	9.4	10.5	11.0	7.5	8.7	8.7
Mississippi	6.0	5.9	4.9	2.3	3.3	2.4
Total	145.3	143.1	143.9	114.8	117.0	106.7
South Atlantic States:						
North Carolina	3.2	4.8	3.5	3.2	5.3	3.2
South Carolina	3.2	6.9	5.2	5.3	4.8	5.5
Georgia	3.9	5.7	4.7	5.3	4.7	5.1
Florida, east coast	3.0	2.3	2.8	2.0	2.5	1.6
Total	13.1	20.0	16.2	15.8	17.3	15.3
Pacific States:						
Alaska	42.3	54.1	46.3	65.1	62.0	1/
Oregon	7.7	5.2	11.7	13.9	11.4	1/
Washington	.5	.4	1.5	2.3	5.2	1/
California	2.3	1.8	1.1	1.0	1.5	1/
Total	52.9	61.4	60.8	82.3	80.1	79.2
All other 2/	13.4	12.8	13.7	11.8	9.9	6.6
Grand Total	224.8	237.0	234.5	224.7	224.3	207.9

1/ Not available.

2/ Virtually all the landings shown are from New England. Negligible amounts of shrimp are produced in Hawaii.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

to November (see table below). During the winter and early spring months, landings are down at all shrimp ports except those on the west coast of Florida. The slack season for the ports of west Florida is in the late summer, when many of the Florida vessels work out of ports in Texas.

Shrimp: U.S. landings in the South Atlantic and Gulf States, by months, 1971-75

(In million of pounds, heads-off weight)

Month	1971	1972	1973	1974	1975
January	5.5	7.8	5.6	8.2	5.1
February	5.1	5.7	4.2	5.7	4.3
March	4.3	5.9	4.3	4.6	4.0
April	3.9	4.7	4.0	3.8	3.5
May	12.6	15.1	8.7	11.2	11.1
June	21.6	19.1	19.7	15.1	15.1
July	21.7	22.1	16.3	16.5	15.7
August	21.9	22.5	11.7	16.3	12.0
September	17.4	18.5	13.8	12.9	11.5
October	21.8	16.3	17.0	14.4	13.9
November	16.9	14.1	13.6	14.3	15.3
December	10.1	9.2	11.7	8.9	10.6

Source: Compiled from official statistics of the U.S. Department of Commerce.

The southeastern U.S. craft catch about 30 percent of their shrimp within 3 miles of the U.S. coast, about 20 percent between 3 and 12 miles off the U.S. coast, 40 percent from more than 12 miles off the U.S. coast, and 10 percent in international waters off foreign shores (virtually all off Mexico). Of the shrimp caught off Mexico, most are taken along the western side of the Gulf of Mexico (fig. 1, p. A-28), where the U.S. vessels operate in waters more than 12 nautical miles

from the Mexican coast. In 1973 Mexico extended its claim to territorial waters from 9 nautical miles to 12 miles, thus somewhat reducing the size of the shrimp grounds available to the U.S. fleet. The U.S. catch declined in this area after that, but natural factors were probably more important in the decline than the extension of territorial waters. The U.S. catch off this section of the Mexican coast, in millions of pounds (heads-off basis), during 1967-74, were as follows: 1967--5.1, 1968--8.1, 1969--4.1, 1970--5.2, 1971--6.5, 1972--8.6, 1973--5.7, and 1974--6.6. In 1975 several U.S. shrimp boats were seized by Mexican authorities for fishing in these claimed territorial waters; the catches were confiscated and the captains were fined. The U.S. fleet also catches shrimp off the Yucatan Peninsula, but here the Mexican claim to 12 miles is not a factor, since the principal shrimp grounds are well outside the 12-mile limit. Virtually all shrimp in the Gulf of Mexico are caught within 200 miles of the shore--or within the fishing zones recently claimed by the United States and Mexico. As discussed on page A-32, the enactment of these 200-mile claims is not expected to alter U.S. shrimp-fishing operations.

It appears--on the basis of various scientific studies and exploratory fishing trips--that in the trawlable areas of the continental shelf of the Gulf of Mexico and the South Atlantic States, where U.S. shrimp craft now operate, the long-term supply of shrimp available to the fleet is fairly steady. However, there are significant annual variations in the supplies of shrimp caused by natural phenomena on the various fishing grounds. Each annual crop can apparently be high or low

regardless of either the supply or the fishing pressures of the year before. Most biologists state that there is little danger of depleting the supply of shrimp by overfishing. Individual States have conservation regulations to protect small shrimp during their early growth; however, critics say that more stringent controls could improve domestic production materially.

The natural supply of shrimp along the coast of the Gulf States during 1973-75 was well below average--apparently due in large part to freshwater flooding during critical periods of the shrimp's life cycle. The natural supply of shrimp during 1970-72, on the other hand, was above average. The table below shows average catches per trip during the 1960-74 period as derived through interviews of boat owners.

Shrimp: Number of trips, catch, and catch per trip at U.S. ports along the Gulf of Mexico, 5-year averages 1960-74, annual 1970-74

Period	Trips	Catch (heads-off basis)	Catch per trip
	Number	1,000 pounds	Pounds
5-year average:			
1960-64	210,176	106,452	506
1965-69	268,277	126,435	471
1970-74	262,083	132,827	507
Annual:			
1970	252,209	145,326	576
1971	227,949	143,078	628
1972	278,637	143,823	516
1973	290,994	114,819	395
1974	260,626	117,088	449

Source: Compiled from official statistics of the U.S. Departments of Interior and Commerce.

Landings of shrimp in Alaska have increased substantially since the mid-1960's, when the market for this type of shrimp expanded, and when improved shrimp-peeling machinery became available to processors. Shrimp-peeling machinery is generally necessary to peel northern shrimp, although one firm in Alaska still peels by hand.

The production in Alaska is somewhat less seasonal than in the other U.S. producing areas. The average landings of shrimp in Alaska during 1970-74, by months, were as follows (in millions of pounds, heads-off basis):

Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
4.0	3.5	2.1	1.5	2.6	5.1	7.1	7.7	5.7	6.1	5.6	4.2

Production of processed shrimp 1/

The principal processed shrimp items produced in the United States are peeled shrimp, breaded shrimp, and canned shrimp. The output of these products, together with that of cooked, whole shrimp, dried shrimp, and fresh or frozen shrimp marketed by processors, was probably valued at about $400 million in 1974. Output of breaded shrimp, canned shrimp, and cooked peeled shrimp rose to peaks in 1973 (see table on p. A-52). During 1965-74, annual domestic production of canned shrimp increased from 16 million pounds in 1965 to 25 million pounds in 1973 and then declined to 22 million pounds in 1974; the annual rate of increase during the period was 4.0 percent. Output of cooked peeled shrimp rose

1/ Data on domestic production are on a product-weight basis.

from 4 million pounds in 1965 to 25 million pounds in 1973 and then declined to 17 million pounds in 1974; the annual rate of increase was 13.8 percent.

During 1965-74, annual U.S. production of peeled raw shrimp ranged from 23 million to 38 million pounds and averaged 30 million pounds; annual output of frozen, breaded, raw shrimp ranged from 92 million to 110 million pounds and averaged 102 million pounds. The production of breaded extruded shrimp is not separately reported but is believed to be increasing. Such production is included in the figures for breaded shrimp.

In addition to their processing operations, domestic processors also market some fresh or frozen shrimp in heads-off, shell-on form. They sell fresh shrimp in bulk to local consumers and frozen shrimp in packages for distribution to retailers. Total sales of fresh and frozen shell-on shrimp are not separately reported.

U.S. production of cooked, whole shrimp and dried shrimp is relatively unimportant and goes largely to the specialty trade.

Shrimp products: U.S. production, 1965-74

(In millions of pounds) 1/

Year	Peeled		Frozen breaded		Canned	Cooked whole	Dried
	Raw	Cooked	Raw	Cooked			
1965--	23.5	4.1	2/ 98.1	3/	15.6	4/	0.3
1966--	24.7	5.4	2/104.9	3/	14.2	4/	.3
1967--	32.2	7.1	2/ 94.2	3/	16.9	4/	.4
1968--	32.7	13.3	2/103.0	3/	19.0	2.8	.6
1969--	33.3	16.2	2/105.6	3/	19.1	10.1	.7
1970--	38.4	20.1	102.9	2.1	25.1	7.7	.8
1971--	34.3	20.7	102.7	1.9	22.3	8.7	.7
1972--	30.0	22.7	104.4	2.9	23.8	4.5	.6
1973--	24.3	25.4	110.2	1.7	25.2	3.7	.3
1974--	22.6	17.2	2/ 91.8	3/	22.1	2.0	.5

1/ Product weight, except for canned--which is drained weight.
2/ Includes cooked.
3/ Included with raw shrimp.
4/ Data are not separately reported.

Source: Compiled from official statistics of the U.S. Department of Commerce.

U.S. Inventories

During 1965-72 U.S. cold-storage holdings of shrimp increased erratically from 46 million pounds on January 1, 1965, to a record 93 million pounds on January 1, 1973 (table on p. A-13), reflecting an increase in per capita supplies of shrimp in 1972 that was double the increase in per capita consumption. Since then, January 1 stocks have been reduced each succeeding year; on January 1, 1974, they amounted to 79 million pounds, and on January 1, 1975, to 76 million pounds. On January 1, 1976, cold-storage holdings stood at an estimated 47 million pounds, two-fifths less than at the beginning of 1974 and 1975 and one-half less than on January 1, 1973. The sharp decline in 1975 reflects reduced supplies of shrimp available from domestic landings and imports. In addition, when prices are high and rising--as in late 1975--dealers may try to decrease inventories because of higher carrying costs and because of the possibility of a price drop.

Inventories of canned shrimp are small compared with those of frozen shrimp.

Cold-storage holdings of frozen shrimp are normally lowest in June and highest in December--at the beginning and end, respectively, of the peak of production in the southeastern shrimp fishery. In 1971, a year in which inventories at the end were about equal to those at the beginning, first-of-the-month cold-storage holdings of shrimp are shown below (in millions of pounds, heads-off basis).

Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
72.2	62.6	58.2	50.5	43.0	39.4	44.9	46.6	56.2	65.5	66.0	68.7

U.S. Exports

Annual U.S. exports of shrimp rose from an average of about 17 million pounds in 1960-64 to 58 million pounds (heads-off basis) in 1973 (table on p. A-13). Such exports totaled 39 million pounds in 1974 and 38 million pounds in 1975 and were equivalent to nearly 10 percent of the domestic consumption of shrimp.

During 1971-75, U.S. exports of domestic fresh and frozen shrimp on a product-weight basis ranged from a high of 37 million pounds in 1973 to a low of 28 million pounds in 1974 and 1975 (table 13). Also during 1971-75, U.S. exports of domestic shrimp in airtight containers (virtually all canned) ranged from 10 million pounds in 1973 to 6 million pounds in 1975 (table 14). During recent years, approximately 70 percent of the exports have been frozen, 20 percent have been in airtight containers, and 10 percent have been fresh.

About 1974, the practice of shipping imported packaged frozen shrimp that fails to meet U.S. Food and Drug Administration (FDA) specifications to Mexico developed. The rejected shrimp are reprocessed in Mexico to meet FDA standards, repackaged, and then shipped back into the United States. These shrimp generally originate in countries other than Mexico.

Table 15 shows U.S. exports of domestically produced shrimp and foreign-produced shrimp in terms of product weight. About 75 to 80 percent of the exports are of domestic origin. The exports of shrimp of foreign origin consist mainly of shrimp from Mexico and other Latin American countries passing through the U.S. distribution system on the way to Canada, Japan, and Europe.

Canada has traditionally been the major export market for U.S. shrimp; all types of shrimp products--fresh, frozen, canned, breaded, dried, and so forth--are shipped there. In recent years, however, Mexico and Japan have also been important in terms of quantity (tables 13 and 14). Some U.S. processors ship domestic shell-on shrimp across the border into Mexico to be processed and then brought back. The flow of U.S. exports to Japan is highly erratic; it depends largely on the dollars the Japanese buyers have to spend and on the degree of speculative interest there is in shrimp. The United States also exports sizable amounts of shrimp to Europe, particularly the small cold-water shrimp from the Pacific and from off the coast of New England. The principal European markets are Sweden, the United Kingdom, Denmark, France, and Switzerland.

U.S. Employment

The southeastern shrimp-fishing industry is believed to employ about 20,000 fishermen--12,500 on craft of 5 net tons or more and 7,500 on craft of less than 5 net tons (estimated from data of the National Marine Fisheries Service and from questionnaire data supplied to the Commission by owners of craft listed by the Service). About half the fishermen on the larger craft and all of those on the smaller craft work only part time at shrimp fishing. On the full-time vessels, moreover, there is some turnover of captains and crews--many crew members are transients. Workers on the part-time craft find their principal employment elsewhere. The typical small-craft owner has a steady job on shore and operates his boat on days off and on weekends either alone or with the help of relatives or friends.

The Pacific coast shrimp fishery is believed to employ about 500 fishermen on craft of 5 net tons or more, and 50 on craft of less than 5 net tons. Employment is mostly full time, although many craft fish for something other than shrimp for a few months each year.

The New England shrimp fishery probably employs about 500 fishermen on craft of 5 net tons or more and another 500 on craft of less than 5 net tons. None of these fishermen now work full time at shrimping, but many probably derived the bulk of their income from shrimp fishing before 1975, when the shrimp season was shortened. Most shrimp fishermen receive their alternate income from fishing for groundfish.

Compensation to fishermen in all segments of the shrimp fishery is generally determined by a division of the proceeds from the sale of the catch. The general practice is for the owner to retain a proportion--

from one-half to two-thirds--of the receipts. The captain divides the remainder among the crew (including himself) on a basis determined by the customary practice in the particular port and by the experience and efficiency of the individual fishermen. If the captain owns the boat he will take more than half. The owners generally pay for the fuel, State license, fishing gear, and materials for repair of the rigging; the crews supply their own groceries and probably pay for half of the ice and in some areas for part of the repairs of the nets. A novice fisherman in the gulf may be employed mainly to behead shrimp, and receives pay based only on the volume of shrimp that the vessel lands; he does not contribute toward the costs of groceries, ice, and so forth.

The shrimp packinghouse provides employment on a seasonal basis. Employment of workers in a packinghouse varies with the volume of shrimp being landed in the area, and the workers are often hired on a day-to-day basis. Headers (those who behead shrimp) are usually paid on a piecework basis; others are paid on an hourly basis.

Testimony at the Commission's hearing and questionnaire data supplied by breaders indicate that the southeastern shrimp-breading industry employs 5,000 or 6,000 people; shrimp breading elsewhere, about 2,000. It is estimated that the southeastern canned-shrimp industry employs about 1,000 or fewer--and for only part of the year; the combined freezing and canning of Pacific shrimp, about 1,000 to 2,000; and the processing of New England shrimp, a few hundred.

During 1974 and 1975, about 1,000 people are estimated to have lost their jobs when six major breading plants closed in the gulf area. Many were rehired at two plants that reopened under new ownership.

Employment in the processing of shrimp, as reported by the respondents to the Commission's questionnaire, is fairly steady through the year. The busiest season, June-December, parallels the period of heaviest domestic shrimp landings. During the remainder of the year, employment is about 20 percent lower.

An index of employment in the shrimp-processing plants during 1970-74 showed an erratic downtrend in the Southeast, the primary producing area, as indicated in the table below. Employment there increased slightly, however, in January-June 1975, compared with what it had been in January-June 1974. For the country as a whole, employment was at a peak in 1972; it declined sharply in 1973 mainly because of the closure of one large plant in the Far West. Closures of large plants in the Southeast are not represented in the index because these firms did not supply employment data.

Indexes of the average number of workers employed by shrimp processors, 1970-74, January-June 1974, and January-June 1975

(For 1970-74, 1970=100; for January-June periods, January-June 1974=100)

Area	1970	1971	1972	1973	1974	January-June--	
						1974	1975
Southeast	100	93	96	92	92	100	102
Northeast	100	101	115	115	104	100	91
Far West	100	126	167	81	84	100	104
Total	100	98	106	96	94	100	99

Source: Compiled from data submitted in response to questionnaires of the U.S. International Trade Commission by domestic processors of shrimp.

Profit-and-loss Experience

Boatowners

Questionnaires were sent to a selected sample of 210 shrimp boatowners geographically distributed throughout the United States (including Alaska), and to a group of 129 known significant freezers, packers, and breaders. Some of the latter group also operate shrimp trawler fleets.

The response to the questionnaire sent to the boatowners in the sample was very poor. Of the 210 owners in the sample, 83, or approximately 40 percent of the sample responded; of that 83, only 39 submitted questionnaires that were usable for profit-and-loss information (see the table on the next page). A followup on each individual boatowner was not practical. Therefore, in order to get some data on the profit-and-loss experience of the owners, boatowners who were known to have trawler fleets as well as those who had testified at the Commission's hearings in various parts of the country were asked to supply information. It cannot be said that data supplied by these owners are necessarily representative of the industry or that any scientific sampling techniques can be applied to this group. However, perhaps a better understanding of the industry can be obtained and trends can be observed by surveying the operating results of this group, which are shown in the table on page A-61. That table shows sales, the major elements of cost, and the net profit or loss on operations. The table was developed from detailed information furnished by 15 boatowners in the Texas-Louisiana region, 24 boatowners in Florida, and 16 in the South Atlantic region.

Profit-and-loss experience of 72 U.S. shrimp boatowners, 1971-75 1/

Item	Value					Percent of sales				
	1971	1972	1973	1974	1975	1971	1972	1973	1974	1975
South Atlantic region										
Sales	$801,830	$773,714	$1,210,525	$852,249	$1,302,793	100.0	100.0	100.0	100.0	100.0
Net profit	190,911	164,580	355,400	13,582	283,588	23.8	21.3	29.4	1.6	21.8
Gulf region										
Sales	1,734,798	2,159,677	2,483,752	2,018,325	2,085,312	100.0	100.0	100.0	100.0	100.0
Net profit or (loss)	295,182	292,019	321,547	(28,469)	42,378	17.0	13.5	12.9	(1.4)	2.0
Total										
Sales	2,536,628	2,933,391	3,694,277	2,870,574	3,388,105	100.0	100.0	100.0	100.0	100.0
Net profit or (loss)	486,093	456,599	676,947	(14,887)	325,966	19.2	15.6	18.3	(.5)	14.7

1/ Includes 39 boatowners of the original sample plus 33 boatowners responding to hearings and fieldwork.

Source: Compiled from data submitted to the U.S. International Trade Commission by domestic shrimp boatowners.

Profit-and-loss experience of a selected number of shrimp boatowners, 1971-75

* * * * * * *

Profit-and-loss experience of a selected number of shrimp boatowners, 1971-75--Continued

* * * * * * *

The tables show that during 1971-73, these boatowners were operating at a profit. In 1974, however, many owners suffered heavy losses owing in part to poor catches and in part to rapidly increasing costs, principally fuel and labor. It appears that in 1975 the boatowners were again in a profit position.

U.S. processors of shrimp

Of the 129 processors to which questionnaires were sent, 34 responded with usable profit-and-loss data; these 34 processors represent approximately 40 percent of the domestic industry processing shrimp. Many of the responses were obtained only through direct fieldwork followup.

Most of the responding processors had a difficult time in allocating income and expenses between their total operations and those on shrimp products only. Most concerns do not keep accounting records so that these operations can be separated. Many stated that in their concern there was no reasonable way that such expense allocations could be made so that the amounts reported would accurately reflect their shrimp operations only.

The table on page A-64 indicates by geographic location the profit-and-loss experience of those processors that did furnish profit-and-loss data. The table shows that the sales increased for the overall operations during the period 1971-74 and that the operating profit increased during the period 1971-73, followed by a loss in 1974 and then a profit in 1975. Net sales were $228.2 million in 1971, $259.4 million in 1972, $294.1 million in 1973, $312.6

Profit-and-loss experience of U.S. processors of shrimp on their total operations of establishments in which shrimp is processed, 1971-75

Year and area	Sales	Cost of goods sold	Gross profit	General, selling, and administrative expense	Net operating profit or (loss)	Other income or other (expense), net	Net profit or (loss) before income taxes	Ratio of net operating profit or (loss) to net sales	Ratio of net profit or (loss) before taxes to net sales	Number of companies reporting	Number of companies showing operating losses
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent	Percent		
1971											
Atlantic coast region	51,241	45,309	5,932	4,510	1,422	(511)	911	2.8	1.8	7	-
Gulf coast region	105,765	88,678	17,087	13,571	3,516	(135)	3,381	3.3	3.2	16	2
Pacific coast region	71,194	62,974	8,220	4,845	3,375	227	3,602	4.7	5.1	6	2
Total or average	228,200	196,961	31,239	22,926	8,313	(419)	7,894	3.6	3.5	29	4
1972											
Atlantic coast region	61,839	54,973	6,866	5,622	1,244	(627)	617	2.0	1.0	7	-
Gulf coast region	117,849	98,850	18,999	15,125	3,874	(393)	3,481	3.3	3.0	16	-
Pacific coast region	79,737	70,883	8,854	5,440	3,414	(568)	2,846	4.3	3.6	6	1
Total or average	259,425	224,706	34,719	26,187	8,532	(1,588)	6,944	3.3	2.7	29	1
1973											
Atlantic coast region	72,808	64,370	8,438	6,710	1,728	(734)	994	2.4	1.4	7	-
Gulf coast region	140,535	119,266	21,269	17,506	3,763	(1,481)	2,282	2.7	1.6	18	5
Pacific coast region	80,800	70,716	10,084	6,339	3,745	(1,415)	2,330	4.6	2.9	6	1
Total or average	294,143	254,352	39,791	30,555	9,236	(3,630)	5,606	3.1	1.9	31	6
1974											
Atlantic coast region	83,963	74,791	9,172	7,892	1,280	(990)	290	1.5	.3	7	1
Gulf coast region	159,407	141,306	18,101	19,073	(972)	(1,301)	(2,273)	(.6)	(1.4)	20	6
Pacific coast region	69,182	63,915	5,267	6,844	(1,577)	(5,096)	(6,673)	(2.3)	(9.6)	5	2
Total or average	312,552	280,012	32,540	33,809	(1,269)	(7,387)	(8,656)	(.4)	(2.8)	32	9
1975											
Atlantic coast region	57,186	52,385	4,801	4,864	(63)	(594)	(657)	(.1)	(1.1)	4	2
Gulf coast region	162,548	140,442	22,106	18,103	4,003	(1,039)	2,964	2.5	1.8	18	3
Pacific coast region	61,654	54,607	7,047	5,399	1,648	(181)	1,467	2.7	2.4	5	1
Total or average	281,388	247,434	33,954	28,366	5,588	(1,814)	3,774	2.0	1.3	27	6

Source: Compiled from data submitted to the U.S. International Trade Commission by the domestic shrimp processors.

million in 1974, and--for those companies reporting in 1975--$281.4 million. Operating profit was $8.3 million in 1971, $8.5 million in 1972, and $9.2 million in 1973; there was an operating loss of $1.3 million in 1974 and an operating profit--for those companies reporting in 1975--of $5.6 million. The ratio of net operating profit to net sales was 3.6 percent in 1971, 3.3 percent in 1972, 3.1 percent in 1973, and--for those companies reporting in 1975--2.0 percent; the ratio of net operating loss to net sales in 1974 was 0.4 percent.

The ratio of net profit to net sales in 1971 was 3.5 percent; in 1972, 2.7 percent; in 1973, 1.9 percent; and, for those companies reporting in 1975, 1.3 percent; the ratio of net loss to net sales in 1974 was 2.8 percent.

The table on the following page shows that net sales of shrimp and shrimp products were $123.3 million in 1971, $134.7 million in 1972, $150.0 million in 1973, $173.2 million in 1974, and--for those operations reporting in 1975--$159.6 million. The net operating profit was $3.5 million in 1971, $3.6 million in 1972, $3.8 million in 1973, and $4.2 million in 1975; the net operating loss in 1974 was $0.1 million. The ratio of net operating profit to net sales was 2.8 percent in 1971, 2.7 percent in 1972, 2.5 percent in 1973, and 2.6 percent in 1975; the ratio of net operating loss to net sales in 1974 was 0.1 percent. The ratio of net profit to net sales was 2.4 percent in 1971, 2.1 percent in 1972, 1.3 percent in 1973, and 1.7 percent in 1975; the ratio of net loss to net sales in 1974 was 1.0 percent.

Profit-and-loss experience of U.S. processors of shrimp on their shrimp processing operations only, 1971-75

Year and area	Sales	Cost of goods sold	Gross profit	General, selling, and administrative expense	Net operating profit or (loss)	Other income or other (expense)	Net profit or (loss) before income taxes	Ratio of net operating profit or (loss) to net sales	Ratio of net profit or (loss) before taxes to net sales	Number of companies reporting	Number of companies showing operating losses
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent	Percent		
1971											
Atlantic coast region	22,276	19,101	3,175	2,334	841	(371)	470	3.8	2.1	7	-
Gulf coast region	88,505	75,477	13,028	10,610	2,418	(80)	2,338	2.7	2.6	15	3
Pacific coast region	12,478	10,731	1,747	1,554	193	(101)	92	1.6	.7	5	2
Total or average	123,259	105,309	17,950	14,498	3,452	(552)	2,900	2.8	2.4	27	5
1972											
Atlantic coast region	23,789	20,428	3,361	2,872	489	(461)	28	2.1	.1	7	-
Gulf coast region	96,055	81,725	14,330	11,537	2,793	(342)	2,451	2.9	2.6	16	1
Pacific coast region	14,889	12,939	1,950	1,626	324	21	345	2.2	2.3	5	1
Total or average	134,733	115,092	19,641	16,035	3,606	(782)	2,824	2.7	2.1	28	2
1973											
Atlantic coast region	26,415	22,254	4,161	3,012	1,149	(507)	642	4.4	2.4	7	-
Gulf coast region	107,539	92,236	15,303	12,608	2,695	(1,287)	1,408	2.5	1.3	18	8
Pacific coast region	16,033	14,260	1,773	1,833	(60)	7	(53)	(.4)	(.3)	5	1
Total or average	149,987	128,750	21,237	17,453	3,784	(1,787)	1,997	2.5	1.3	30	9
1974											
Atlantic coast region	29,462	25,254	4,208	3,408	800	(544)	256	2.7	.9	7	1
Gulf coast region	125,148	112,406	12,742	13,634	(892)	(1,029)	(1,921)	(.7)	(1.5)	20	5
Pacific coast region	18,622	16,741	1,881	1,909	(28)	-	(28)	(.2)	(.2)	4	1
Total or average	173,232	154,401	18,831	18,951	(120)	(1,573)	(1,693)	(.1)	(1.0)	31	7
1975											
Atlantic coast region	29,873	25,028	4,845	3,520	1,325	(609)	716	4.4	2.4	4	1
Gulf coast region	126,004	109,814	16,190	12,775	3,415	(792)	2,623	2.7	2.1	18	3
Pacific coast region	3,698	3,147	551	1,116	(565)	(5)	(570)	(15.3)	(15.4)	4	1
Total or average	159,575	137,989	21,586	17,411	4,175	(1,406)	2,769	2.6	1.7	26	5

Source: Compiled from data submitted to the U.S. International Trade Commission by the domestic shrimp processors.

U.S. Producers' Efforts To Compete With Imports

U.S. shrimp-fishing costs rose sharply in the recent energy crisis of 1973-74, whereas it had relatively little effect on the fishing costs of some major suppliers of shrimp to the United States. (Testimony at the hearings and fieldwork data indicate that the cost of fuel alone tripled in the United States, increasing from one-tenth to about one-third of the operating costs. The costs of nets and other gear also increased markedly.) While prices of fuel to U.S. vessel owners rose during this period, the prices of fuel remained unchanged to vessel owners in Mexico and in most of the other principal shrimp-producing countries in Latin America; any price differential was offset by the respective Governments. The southeastern vessel owners are cutting costs by using smaller nets (which reduce drag so that the boats consume less fuel; they also need less netting), by traveling to distant grounds less often, and by ceasing operations during slack periods. (The owners of the larger trawlers had been operating their vessels through the lean months of late winter and early spring, often at a financial loss, to retain their crews.) Attempts are being made to develop more efficient propulsion systems. Other proposed attempts to meet higher fuel costs include the construction of smaller and lighter trawlers for the gulf and the construction of more versatile trawlers for the coasts of South Atlantic States.

To meet the competition from low-labor-cost developing countries, U.S. shrimp processors developed mechanical shrimp-peeling machines in the 1950's. These machines have been improved upon over the years. Some shrimp processors also reduce the cost of peeling shrimp by

sending shell-on shrimp to Mexico to be peeled and then shipped to the U.S. plant for further processing. Other processors avoid peeling costs by the use of imported peeled shrimp--some from foreign plants of their own. The imported peeled shrimp are either packed as such under the domestic processor's label or processed into breaded shrimp or shrimp specialties.

Some shrimp processors have cut costs with the aforementioned production of breaded extruded or preformed shrimp. They chop up pieces of broken shrimp and low-priced, small, whole shrimp, usually add soy protein and other ingredients, compress the material to simulate a whole shrimp or to form a shrimp stick, and then add the breading.

The Question of Imports as a Substantial Cause of Serious Injury

U.S. Consumption

Aggregate in all forms

The apparent consumption of shrimp in the United States has been increasing markedly for many years; it reached a peak in 1974 of 440 million pounds, heads-off, shell-on basis (table on p.A-13). Apparent consumption then declined to 415 million pounds in 1975. During the period 1965-74, apparent consumption increased at an annual rate of 3.9 percent. In 1975, however, consumption declined about 6 percent from that in 1974, but was larger than in any year prior to 1974. Despite the weakened economy of 1974-75, consumers apparently did not shift their eating choice from shrimp to less expensive foods.

The bulk of the shrimp consumed in the United States have been those which had been marketed with the shell on and which had been peeled but not further processed. In recent years, about 40 percent of the shrimp marketed were in the shell, 30 percent were peeled but not otherwise processed, 15 percent were breaded, 10 percent were canned, and 5 percent were processed in some other manner.

The various shrimp products generally are not used interchangeably although many individual consumers buy shrimp in more than one form. Thus, a consumer may buy shell-on shrimp at one time and canned shrimp at another, but is not likely to try to substitute one form for another unless the price is exceptionally low. The bulk of the shrimp are consumed through the restaurant and institutional trade; retail sales of shrimp are believed to account for only 30 to 40 percent of consumption.

Per capita consumption of shrimp in all forms has not changed much in recent years (see table on p. A-73). During the period 1970-74, annual per capita consumption ranged from 1.29 pounds to 1.44 pounds. The per capita consumption of shrimp is particularly high in the coastal areas from New York to Texas; it is lowest in the interior regions.

Fresh and frozen shrimp

U.S. consumption of fresh shrimp declined many years ago when frozen shrimp virtually replaced fresh shrimp. The consumption of fresh shrimp during the 1970's is believed to have continued to decline somewhat in metropolitan markets such as New York City, but to have increased slightly in shrimp-producing areas--where more is sold directly from producer to retail consumer.

U.S. consumption of frozen, shell-on shrimp has increased as the principal consumers--restaurant patrons and chainstore customers--have increased their demand. Many restaurants buy shell-on shrimp and peel it themselves.

The U.S. consumption of frozen breaded shrimp climbed markedly in the 1950's and early 1960's before reaching a plateau in the late 1960's. Consumption of breaded shrimp reached a small peak in 1973, a year before the peak for the aggregate of shrimp in all forms.

For many years, consumption of frozen peeled shrimp in the United States has risen steadily at both restaurants and retail stores. The larger sized peeled shrimp are relatively high priced.

Canned shrimp

U.S. consumption of canned shrimp has grown over the past 15 years. Increased production in the Pacific States supplied this growing market at the same time that the gulf production declined. Imports are not separately reported, but are believed to be small relative to total consumption.

The trend in consumption of shrimp versus the trend in consumption of all fish and shellfish

While the apparent U.S. consumption of shrimp was increasing during 1960-74, the consumption of all seafoods also increased, although not quite as markedly (see table below). The percentage of shrimp in the total of all fish and shellfish increased from an average of 11 percent during 1960-64 to 13 percent in nearly all of the years during the 1967-74 period. The highest percentage, that for 1970, was 13.5 percent, as shown in the following table.

Apparent U.S. consumption of shrimp, of all fish and shellfish, and percentage of shrimp in total, 5-year average 1960-64, annual 1965-74

(In millions of pounds, edible weight)

Period	Shrimp	All fish and shellfish	Percentage of shrimp in total
	Million pounds	Million pounds	
Average 1960-64	205	1,940	10.6
Annual:			
1965	245	2,069	11.8
1966	245	2,108	11.6
1967	267	2,070	12.9
1968	285	2,168	13.1
1969	282	2,229	12.7
1970	322	2,380	13.5
1971	309	2,327	13.3
1972	322	2,537	12.7
1973	312	2,625	11.9
1974	349	2,630	13.3

Source: Compiled from official statistics of the U.S. Department of Commerce.

The per capita consumption of shrimp, in terms of edible weight, increased from 1.09 pounds in 1960-64 to 1.41 pounds in 1974. At the same time, the per capita consumption of all fish and shellfish increased from 10.6 pounds to 12.3 pounds. The percentage of shrimp in all fish

and shellfish consumption, on a per capita basis, increased from 10.3 in 1960-64 to 12.5 in 1968, and then declined irregularly to 11.5 in 1974, as shown in the following table.

Per capita U.S. consumption of shrimp, of all fish and shellfish, and percentage of shrimp in total, 5-year average 1960-64, annual 1965-74

Period	Shrimp	All fish and shellfish	Percentage of shrimp in total
	Pounds	Pounds	
Average 1960-64	1.09	10.6	10.3
Annual:			
1965	1.24	10.8	11.5
1966	1.21	10.9	11.1
1967	1.29	10.6	12.2
1968	1.37	11.0	12.5
1969	1.31	11.2	11.7
1970	1.44	11.8	12.2
1971	1.39	11.4	12.2
1972	1.44	12.3	11.7
1973	1.29	12.6	10.2
1974	1.41	12.3	11.5

Source: Compiled from official statistics of the U.S. Department of Commerce.

Determination of Market Prices

Prices paid to the U.S. shrimp fishery are dependent on various economic factors, including the availability of shrimp from domestic and foreign sources and the demand for shrimp domestically and internationally. Prices paid for landings, which are referred to as ex-vessel prices, are determined by several factors, including the size of the shrimp and the species. Different prices for shrimp of the same size and species exist owing to the condition of the shrimp and the reputation of the seller for handling and quality.

Prices vary daily in different parts of the country. Price for gulf shrimp, however, may reflect those prices established in Brownsville-Port Isabel, Tex. At Brownsville, buyers bid for all sizes of shrimp brought into the port in 1 day. The highest bid will determine the price for all shrimp landed that day. Prices in other ports are sometimes established by buyers before the vessels leave port, but generally the landed prices of shrimp are reflected by prices reported in the Chicago and New York wholesale markets.

Size differences are reflected in price differentials of 35 to 45 cents per pound. Large shrimp (21-25 shrimp per pound) command a higher price than the medium (31-40 shrimp per pound) or smaller sizes of shrimp. On the west coast there is a strong demand for the tiny shrimp (more than 100 per pound) landed there.

Consumers in the remainder of the United States will use only small amounts of this shrimp at the prices that west coast consumers are willing to pay.

Prices may vary according to preferences for different species of shrimp both domestically and internationally. In general, the U.S. east coast will consume brown shrimp, while the U.S. west coast prefers white shrimp. Japanese buyers, the major competitors of the United States in the world market for shrimp, prefer brown shrimp from Mexico and the United States. Japanese buyers influence the U.S. price by competing for the supply of shrimp. Industry sources contend that when Japanese buyers do not purchase shrimp on the world market, the supply of shrimp from foreign sources is diverted to the U.S. market, driving down the price.

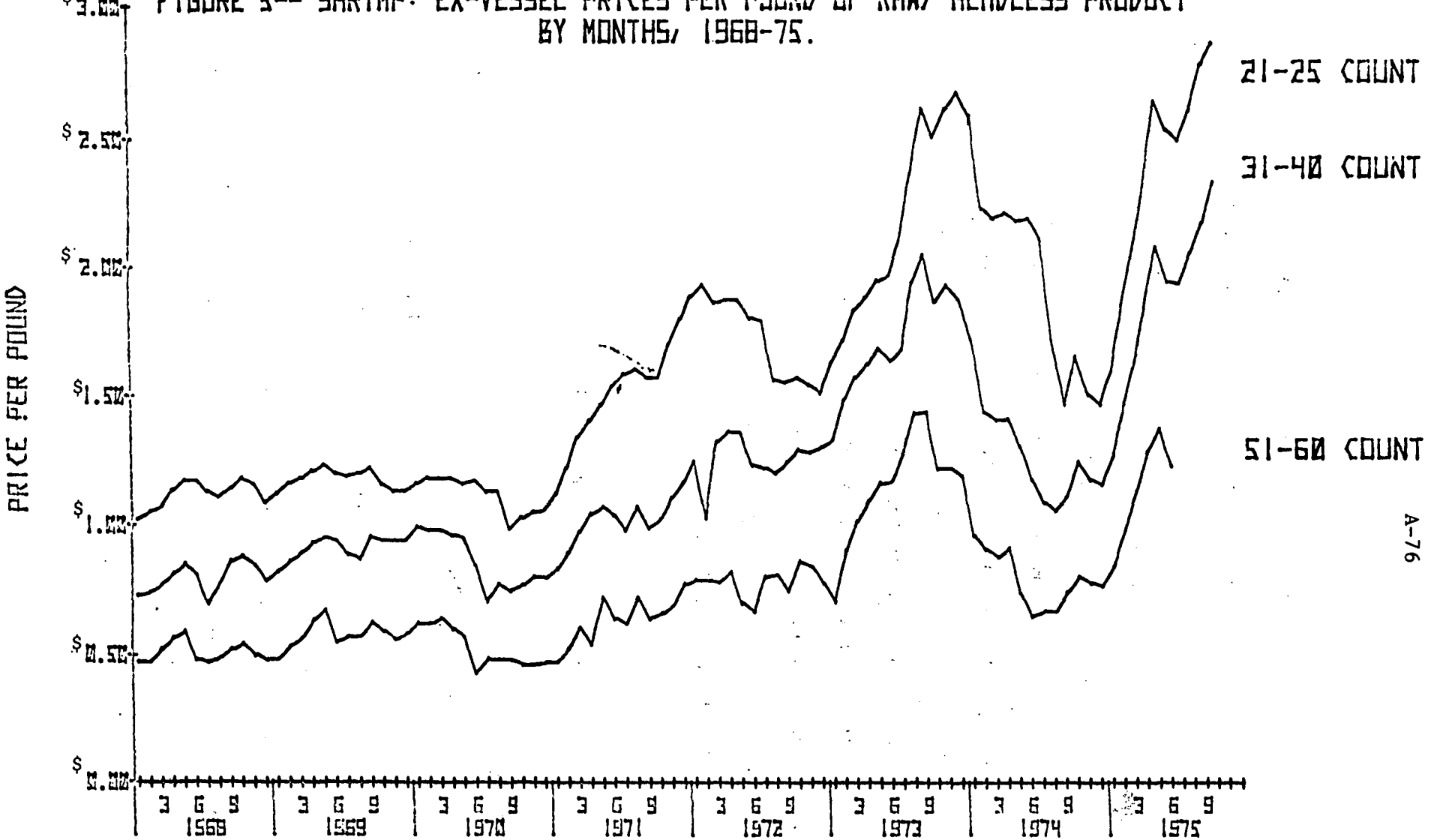
Prices Paid to Domestic Producers

Ex-vessel prices

Prices collected by the National Marine Fisheries Service of the U.S. Department of Commerce for various sizes and species of shrimp are the daily prices per pound at the principal points of landing and at major inland market points.

Movements of ex-vessel prices of raw headless shrimp are shown in figure 5 and in table 16. In 1968-70, price variations for the three major sizes of shrimp shown are small and may be due to seasonal

FIGURE 5-- SHRIMP: EX-VESSEL PRICES PER POUND OF RAW, HEADLESS PRODUCT BY MONTHS, 1968-75.



1/ WEIGHTED AVERAGE, ALL SPECIES, SOUTH ATLANTIC AND GULF.
SOURCE: COMPILED FROM OFFICAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

variations in price. In 1971 an upward trend in prices was evidenced and at the end of the year, prices turned downward. In the middle of 1972, prices turned upward again until historically high levels were reached in the middle of 1973. In 1974, prices again declined to slightly above 1968-69 levels.

The ex-vessel price for 21-25 count shrimp reached its lowest point in 1974 in September and December--$1.47 per pound. This price represents a decrease of 45 percent from the highest 1973 price of $2.68.

Indexes of U.S. ex-vessel prices shown in table 17 trended upward from 103.1 in September 1970 to a high of 230.6 in November 1973, decreased to 132.6 in December 1974, then increased to 232.9 in August 1975.

Price differentials between 21-25 count and 31-40 count shrimp (table 16) remained between 20 and 35 cents per pound from 1968 to the second quarter of 1971, increased erratically to a difference of $1.03 per pound in July of 1974, then dropped to a difference of 53 cents in October of 1975. Price differentials between 31-40 count shrimp and 51-67 count shrimp varied in the same manner, peaking in 1974 at a difference of 76 cents per pound.

Wholesale prices

Wholesale prices are a reflection of the basic factors of supply and demand and costs of production as well as size, species, and quality of the shrimp, and the price of competitive imported shrimp at the wholesale level. Moreover, the price of shrimp may have increased from the ex-vessel price owing to the addition of various costs of processing and transportation, such as beheading, freezing, storing, grading and packaging costs. In general the following pricing structure exists at the wholesale level:

(a) Wholesale prices follow trends evidenced at the ex-vessel level with little lag time. The magnitude of increase or decrease in the wholesale price may not correspond to the magnitude of variations in ex-vessel price, as shown in figure 6.

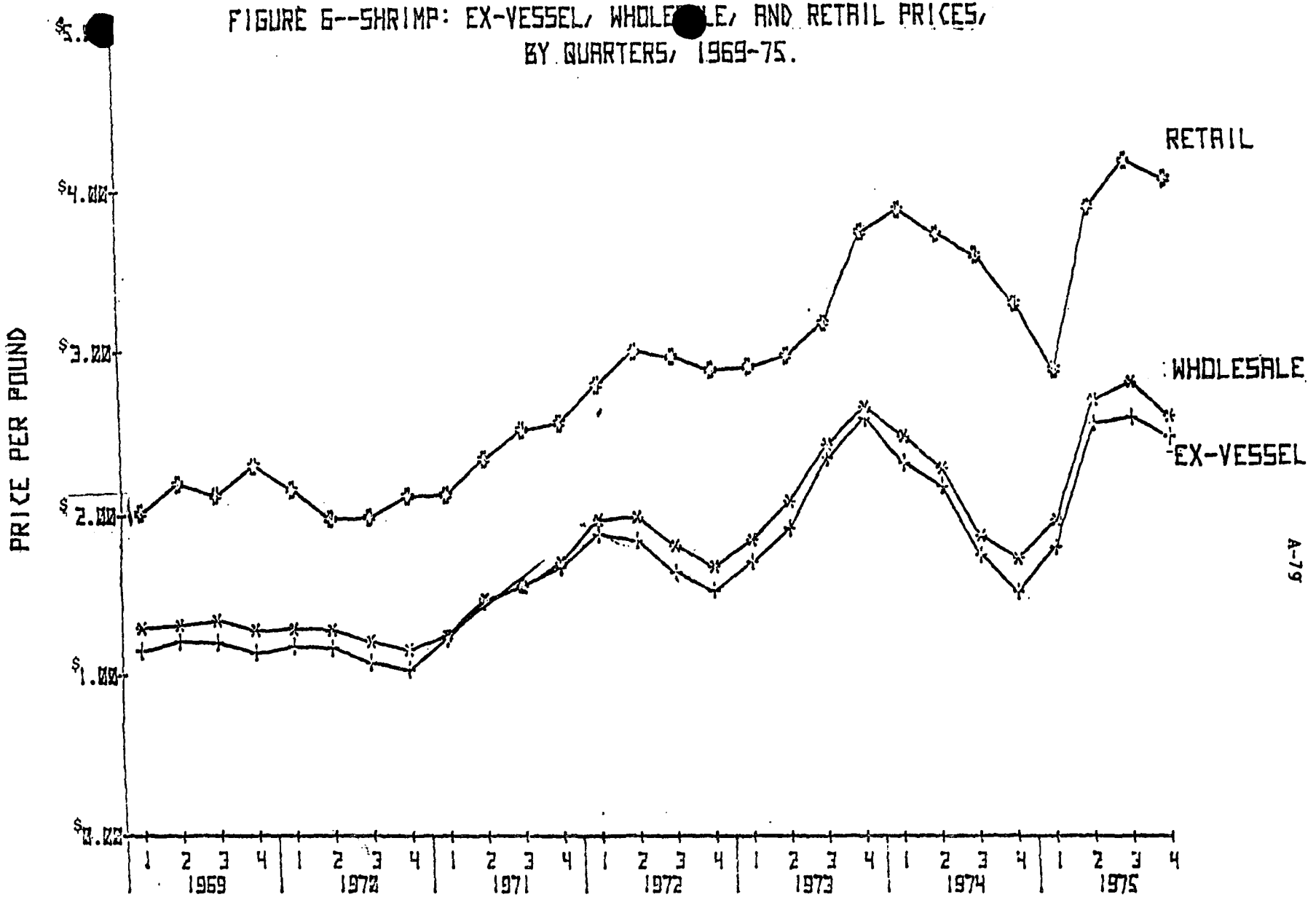
(b) Wholesale prices fluctuated within a small range of values owing primarily to seasonal influences until 1971, when cyclical price movements became of greater magnitude, and they have remained so until the present.

(c) The larger sizes of shrimp generally bring a higher price per pound.

(d) Prices vary according to the location and species of shrimp purchased.

(e) From February through April, new inputs to supply (landings plus imports) are at seasonal lows corresponding to the seasonality of the U.S. catching of shrimp. Inventories are drawn down during this time, and prices increase seasonally. In May, when shrimp landings increase and the increase in supply begins, prices decrease seasonally.

FIGURE 6--SHRIMP: EX-VESSEL, WHOLESALE, AND RETAIL PRICES, BY QUARTERS, 1969-75.



SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE

(f) In Alaska, a price is established for the year by negotiations between producers and processors. Negotiations take place during early spring when very small quantities of shrimp are caught. From 1962 to February 1972, the established price for shrimp was 4 cents per pound. In July 1972 the price increased to 5.5 cents per pound. In 1973 and 1974 the price increased to 8.5 and 9.0 cents per pound, respectively. In 1975, the negotiated price decreased to 7.0 cents per pound. Alaskan processors, however, indicate that contracts with boatowners in Alaska are not firm and that the processor may raise or lower the price during the season in response to market conditions.

Prices of Mexican shrimp in the U.S. market have tended to follow the trend of U.S. prices. Prices of Mexican shrimp rose in 1971, declined in 1972, and then rose again in 1973 to the high levels recorded for comparable periods for the U.S. catch. Prices dropped to near 1972 levels in the latter part of 1974 and have increased since February 1975.

The value of imported shell-on shrimp and raw, peeled shrimp increased from 1970 to 1974. The value of imports from Mexico and Venezuela increased from approximately $0.97 per pound to $1.55 per pound for shell-on shrimp and $2.29 per pound for raw, peeled shrimp in 1974. Trade sources contend that Mexican west coast shrimp is priced 10 to 15 cents per pound higher than U.S. Gulf of Mexico shrimp in the U.S. market and that shrimp caught on the east coast of Mexico enter the U.S. market at about 5 cents less than U.S. Gulf shrimp.

The import value of shell-on shrimp and raw, peeled shrimp from India has increased from approximately $0.99 per pound in 1970 to $1.83 per pound for shell-on shrimp and $1.56 per pound for raw peeled shrimp in 1974. The increase in import value has occurred despite the large variations in U.S. imports from India.

Prices Paid to Foreign Producers

Wholesale prices of imported shrimp at New York are collected by the National Marine Fisheries Service of the U.S. Department of Commerce for various sizes of shrimp from various parts of the world. Wholesale prices of imported large shrimp (under 15 count per pound) from South America at New York increased from $1.57 per pound in January 1970 to $3.38 per pound in February 1974, decreased to $2.52 per pound in January 1975, then increased to $3.81 in November 1975. In the years between 1970 and 1974, prices moved in a cyclical pattern with a peak price reached in February 1972 and a low point reached in January 1973. Large shrimp are imported into the United States from the Persian Gulf and from India only during a few months of the year except in 1974 and prices are generally lower than those of U.S. and South American shrimp of this size, as shown in tables 18-20.

Wholesale prices of imported medium-sized shrimp (26-30 count) from South American sources vary in definite cycles. The wholesale prices of imported shrimp from the Persian Gulf and India also follow this cyclical pattern, although it is not as definite

since these suppliers export to the United States during specific times of the year. The following table shows the high and low points of the price cycle and the intermittent time between peaks and troughs.

Shrimp: Wholesale price cycles of imported medium-sized shrimp at New York, specified months, March 1970 to November 1975

Month and year	Price	Price differential	Time differential
	Cents per pound	Cents per pound	Number of months
March 1970	130.8		
December 1970	119.4	-11.4	9
March 1972	206.1	+86.7	15
December 1972	180.8	-25.3	9
December 1973	276.9	+96.1	12
September 1974	173.1	-103.8	9
November 1975	326.9	+153.8	14

Source: Compiled from official statistics of the U.S. Department of Commerce.

In the period 1970-75, the declining portion of the wholesale price cycle of imported shrimp existed for 9 months with increasing magnitudes, while the increasing portion of the cycle lasted for approximately 14 months with magnitudes of change from 87 cents per pound to $1.54 per pound.

Wholesale prices of imported small shrimp (51-60 count) from South American sources varied no more than 25 cents per pound per month in any year in 1970-74. Prices in 1975 for these shrimp increased from $1.20 per pound in January to $1.85 per pound in November, or by 65 cents. Wholesale prices of imported small shrimp (51-60 count) from the Persian Gulf and India varied from no more than 10 cents to 15 cents per pound per month in any year in 1970-75, except in

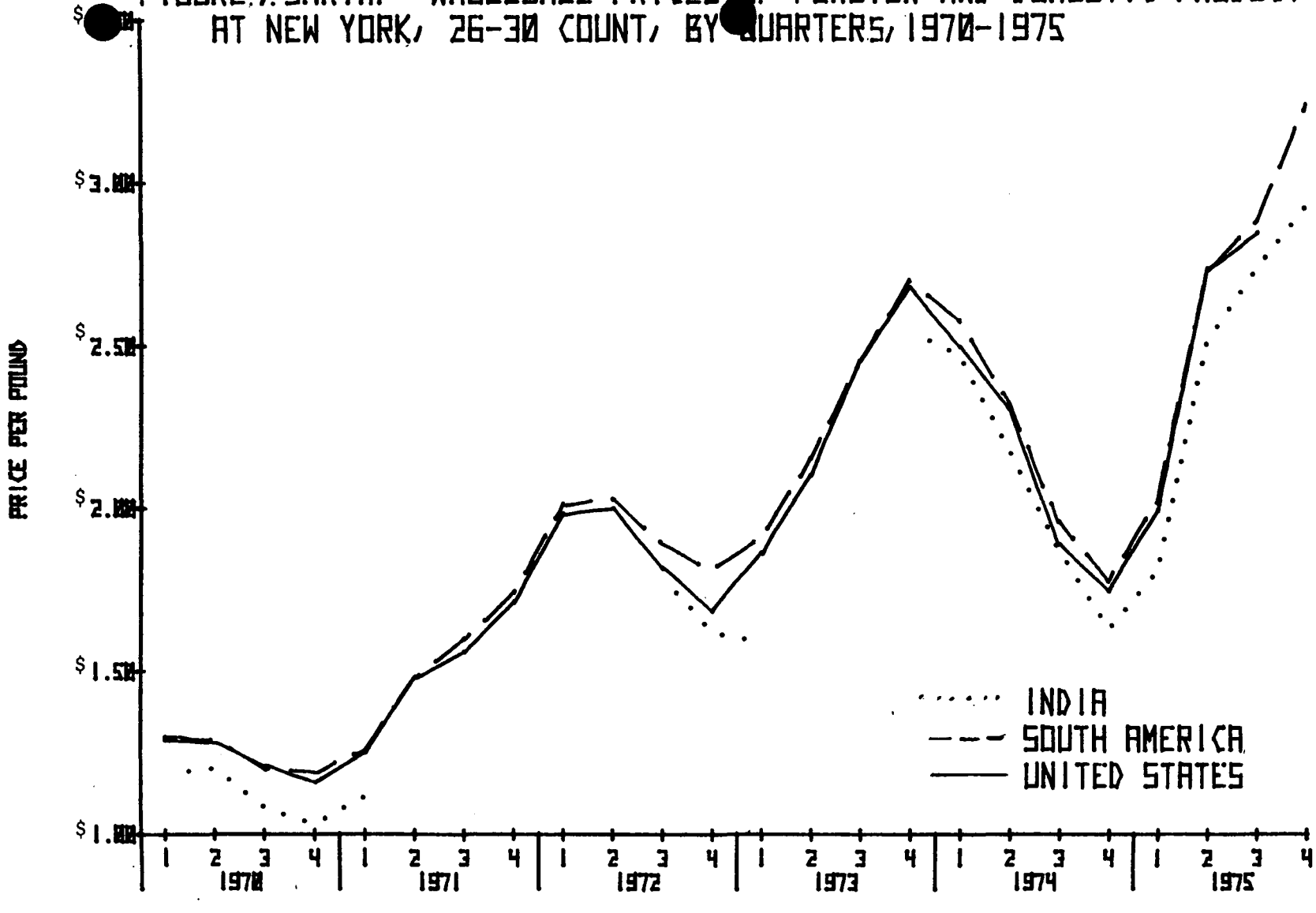
the last 3 months of 1973, when prices increased 50 cents per pound from the first 3 months of the year. Imports from these areas do not enter the United States every month, so pricing data are not available for a few months during some years.

Worldwide shrimp prices in 1975 rose from the relatively low levels reached in 1974. The National Marine Fisheries Service indicates that rising prices for the first 6 months of 1975 were due to poor catches in many areas, including Asia, Australia, and Central and South America. Increased purchases in 1975 in the world market by Japanese buyers also affected world prices. A decrease in domestic landings and a firm consumption pattern in the United States contributed to the increased world price for shrimp in 1975. A combination of rising costs, low inventories, increasing demand, increasing world catches (at least a return to average catches), and consumer resistance to increasing prices may cause shrimp prices to remain at about the current high levels of early 1976.

Price Relationship Between Imported and Domestically Produced Shrimp

Data supplied by the U.S. Department of Commerce on wholesale prices of imported shrimp at New York and wholesale prices of domestically produced shrimp indicate that a small differential exists between these prices. Figure 7, on the following page, shows the wholesale price of imported 26-30-count shrimp from South American and Indian sources at New York and the wholesale price of domestically caught 26-30-count shrimp (weighted average of all species). The relationship between these prices varies, with prices of U.S. shrimp higher in some years than prices of imports and lower in others. Wholesale prices of imported shrimp from India at New Yo[redacted] from 1970 to 1975 were 10 to 25 cents per pound lower than the wholesale price of United States shrimp (weighted average of all species) from the gulf and the South Atlantic, depending on the time of year imports entered the United States and the size of the species of shrimp.

FIGURE 7.SHRIMP: WHOLESALE PRICES OF FOREIGN AND DOMESTIC PRODUCT AT NEW YORK, 26-30 COUNT, BY QUARTERS, 1970-1975



SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE

STATISTICAL APPENDIX

Table 1.--Shrimp in all forms: U.S. imports for consumption, by country, 1971-75

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
MEXICO	74,623,579	80,681,471	76,104,507	78,109,241	75,016,180
INDIA	22,770,468	33,523,533	20,552,709	31,378,935	29,637,182
PANAMA	9,316,454	10,104,539	10,382,192	10,106,283	9,786,796
GUYANA	8,981,374	6,905,668	10,061,646	7,318,832	5,381,604
VENEZUELA	10,083,130	7,994,565	5,714,335	6,495,613	4,912,637
NICARAGUA	5,639,351	6,605,236	6,114,735	6,432,033	6,178,157
INDNSIA	435,481	2,440,899	2,656,179	6,271,707	1,569,626
ECUADOR	5,332,381	6,935,372	7,500,459	6,211,305	8,058,355
COLOMBIA	4,841,346	5,979,240	6,032,440	6,175,410	5,711,633
SALVADR	6,706,740	5,734,752	5,879,839	6,087,433	6,786,876
TAIWAN	500,820	6,021,182	6,504,913	5,313,209	5,596,804
AUSTRALIA	2,723,633	1,490,692	612,321	4,212,912	871,320
THAILND	2,090,061	3,978,481	3,295,902	3,745,629	2,677,774
KUWAIT	2,173,481	2,295,265	2,707,055	3,581,620	1,551,202
HONDURAS	3,942,084	4,810,650	3,442,853	3,429,796	3,596,819
CHINA MAINLAND	29,635	81,304	416,299	2,990,610	1,335,638
BRAZIL	4,405,472	8,931,359	4,263,461	2,968,167	1,354,600
GUATMALA	2,338,163	2,091,480	3,008,847	2,884,484	3,641,989
PAKISTN	2,998,301	2,636,286	1,445,720	2,786,068	1,444,646
IRAN	732,800	1,307,550	525,700	2,727,188	2,211,874
F GUIANA	3,807,582	3,621,681	3,919,710	2,349,511	1,867,461
COSTA RICA	2,323,098	1,829,324	2,393,066	2,262,998	2,333,842
SOUTH VIETNAM			282,153	2,105,213	1,478,510
MALAYSIA	473,356	2,993,681	2,353,849	2,049,295	475,373
BNGLDSH		733,146	1,312,448	2,003,520	2,569,149
TRINIDAD	2,433,859	1,311,416	1,529,468	1,818,876	920,660
SURINAM	2,128,381	2,132,556	1,851,874	1,637,603	3,121,019
HG KONG	80,092	452,783	440,696	1,537,875	2,220,003
SINGAPR	226,631	417,808	1,026,820	1,339,435	457,825
JAPAN	468,504	728,406	304,357	1,274,796	615,515
SRI LKA	131,510	489,400	748,479	996,019	488,552
BARBADOS			233,550	901,280	584,111
PHILIPPINES	281,491	525,670	693,260	878,313	726,424
LIBERIA	881,786	767,469	760,847	841,451	369,801
SAUDI ARABIA	1,011,000	441,600	150,000	791,150	148,800
BAHRAIN	475,950	746,150	935,550	786,796	275,176
KOR REP	8,872	56,011	80,096	730,954	598,847
QATAR		58,550	164,300	652,815	195,110

Table 1.--Shrimp in all forms: U.S. imports for consumption, by country, 1971-75--Continued

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
NEW GUI	110,450			486,800	
CAMROON	476,780	581,050	542,382	418,077	1,114,838
NETHLDS	29,016	55,762	277,127	326,367	590,623
CHILE	104,716	226,270	52,154	325,444	185,781
MALAGAS	1,497,122	431,246	461,200	310,000	258,100
REP SAF	180,462	481,192	545,305	304,962	208,666
SPAIN	831,689	514,562	413,025	301,275	477,211
IVY CST	664,050	50,550	90,288	293,787	31,996
CANADA	379,080	656,988	428,697	290,657	134,020
NIGERIA	82,200		676,650	260,550	191,311
PERU	369,700	903,668	915,978	206,275	508,290
SENEGAL	130,600	98,500	85,900	180,822	
N ZEAL	223,900	6,160		127,571	26,400
DAHOMEY				126,845	
SWEDEN	7,819	398,791	249,534	85,269	3,899
YEMEN S				84,750	
BELIZE	34,450	25,690	562,845	70,778	19,296
DENMARK	35,953	76,309	18,627	64,744	13,886
CANAL Z	153,722	130,434	29,100	63,450	187,660
ANGOLA			59,649	59,114	
DOM REP	32,798	20,922	22,916	53,017	40,765
ARAB EM				52,450	130,010
ICELAND	53,060	23,068	10,211	34,175	106,342
BELGIUM				29,520	28,440
U KING	86,117	131,100	78,460	23,805	189,347
GHANA			30,080	23,500	30,741
ARGENT	12,750	206,880	49,330	23,450	24,768
ETHIOP	21,546	43,092		21,296	
N ANTIL				15,650	
JAMAICA	3,133	6,557	12,100	11,150	12,275
NORWAY	11,051	13,670	14,298	10,100	4,807
IRELAND				8,100	
GREENLD	13,680	117,594	8,400	8,063	5,040
BAHAMAS	35,990	9,778	66,247	8,000	5,397
FRANCE	1,400		31,250	4,040	
MACAO				4,000	
CAMBOD				3,489	
AUSTRIA		3,855	40,650	2,000	

Table 1.--Shrimp in all forms: U.S. imports for consumption, by country, 1971-75--Continued

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
HAITI	3,036	12,160	12,800	1,560	12,230
MOZAMBQUE	50,028	33,200	44,100	1,400	
W GERMANY	100		4,601	656	
SWITZLD					37,500
GUINEA			100,150		84,050
TURKEY	7,389	7,502			
YUGOSLAVIA					10,450
LEBANON		14,150	217,500		
USSR	67,318				
NORTH VIETNAM			617		
JORDAN		30,000			
ISRAEL	31,200				
ARABIA	155,100				11,800
FRENCH PACIFIC IS			273		
CANARY IS	23,520				
BURMA			7,425		
LEEWARD & WINDWARD IS					3,458
YEMEN ADEN		13,660			
KENYA		556			
PARAGUAY		45,950			
TOTAL	191,317,791	223,226,041	202,562,504	228,911,333	201,457,287

SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

Table 2.--Shrimp, shell-on: U.S. imports for consumption, by country 1971-75

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
MEXICO	46,236,894	46,978,132	45,434,712	46,455,028	48,568,745
PANAMA	7,889,787	9,248,222	9,824,830	9,016,430	9,105,925
GUYANA	8,835,348	6,560,104	9,938,896	7,105,320	4,970,354
VENEZ	9,517,184	7,671,415	5,389,000	6,291,533	4,819,727
ECUADOR	4,042,048	6,226,592	6,795,566	5,151,539	6,524,246
COLOMB	4,252,014	5,006,914	5,200,388	5,138,509	4,417,595
INDIA	3,020,372	3,328,095	2,255,749	4,068,052	2,239,506
KUWAIT	2,012,953	2,195,279	2,251,025	3,255,686	1,351,502
HONDURA	3,484,001	4,321,516	2,210,783	3,046,165	3,244,481
NICARAG	2,982,297	3,076,392	2,736,829	2,839,314	4,503,384
SALVADR	4,108,404	3,351,919	3,933,810	2,805,092	3,107,579
IRAN	714,350	1,222,500	510,750	2,719,108	1,897,959
AUSTRAL	1,385,036	427,049	195,331	2,564,924	429,694
CHINA M	29,635	35,220	377,774	2,485,658	565,412
GUATMAL	2,075,995	1,889,590	2,401,877	2,316,509	2,968,447
F GUIAN	3,078,291	3,194,853	3,757,991	2,216,530	1,788,773
INDNSIA	415,084	1,330,162	908,363	2,129,312	651,348
BNGLDSH		670,646	1,222,348	1,888,220	2,321,917
SURINAM	1,650,885	2,061,060	1,786,834	1,635,191	3,111,195
PAKISTN	1,704,005	1,233,016	377,589	1,624,023	566,278
TRINID	2,407,359	1,272,345	1,391,025	1,618,965	431,180
BRAZIL	3,684,463	5,670,194	3,001,509	1,586,824	1,076,674
THAILND	694,571	1,148,334	848,902	1,377,870	332,421
CHINA T	311,422	1,211,070	1,669,624	1,080,815	877,700
C RICA	1,751,588	1,142,524	1,545,348	914,322	845,680
BARBADO			231,100	834,830	472,811
JAPAN	117,714	52,210	66,141	810,994	33,242
S ARAB	1,011,000	441,600	150,000	791,150	23,100
BAHRAIN	475,950	746,150	935,550	786,796	114,242
S VETNM			113,763	747,678	446,271
HG KONG	16,616	71,319	158,538	680,325	718,400
QATAR		58,550	164,300	652,815	195,110
SRI LKA	105,000	336,580	328,420	501,107	346,122
MALAYSA	234,950	759,214	566,904	499,990	121,182
NEW GUI	59,450			486,800	
SINGAPR	54,190	167,540	374,170	452,426	101,290
KOR REP			27,756	392,692	307,550
PHIL R	154,425	183,356	266,877	383,240	392,416

TABLE 2.--Shrimp, shell-on: U.S. imports for consumption, by country, 1971-75--Continued

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
MALAGAS	1,487,122	262,350	170,000	310,000	258,100
SPAIN	604,958	452,631	402,778	287,178	420,651
NIGERIA	82,200		414,850	260,550	12,500
NETHLDS	29,016	54,358	87,180	241,515	450,203
LIBERIA	778,362	240,850	102,076	214,043	154,841
PERU	300,750	844,268	915,078	199,675	493,740
SENEGAL	130,600	98,500	85,900	180,822	
DAHOMEY				126,845	
CANADA	175,715	397,686	271,823	92,235	21,742
IVY CST	606,000	24,050		89,925	
YEMEN S				84,750	
CANAL Z	111,800	93,200	29,100	63,450	187,660
ANGOLA			59,649	59,114	
CHILE	72,216	131,524	10,000	53,000	107,029
ARAB EM				52,450	130,010
DOM REP	32,798	20,922	22,916	48,237	37,190
REP SAF	180,462	154,793	146,666	45,984	55,003
DENMARK	1,650	12,949		32,764	
N ZEAL	20,200	1,960		32,671	26,400
BELGIUM				29,520	28,440
GHANA			30,080	23,500	27,750
ARGENT	12,750	122,240	10,770	23,450	15,300
N ANTIL				14,650	
BELIZE	34,450	18,350	462,215	11,978	19,296
JAMAICA	3,133	5,052	12,100	11,150	12,275
BAHAMAS	35,020	5,058	65,327	8,000	5,397
FRANCE	1,400		31,250	4,040	
CAMBOD				3,489	
AUSTRIA			40,650	2,000	
HAITI	2,600	5,880	12,800	1,560	12,230
MOZAMBQ	50,028	33,200	44,100	1,400	
ETHIOP		43,092			
KENYA		556			
CNRY I	23,520				
CAMROON	295,580	351,050	56,270		584,956
GUINEA			80,600		84,050

Table 2.--Shrimp, shell-on: U.S. imports for consumption, by country, 1971-75--Continued

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
ARABIA	145,600				
LW WW I					3,458
BURMA			7,425		
YEMEN A		13,660			
SWITZLD					37,500
U KING	79,307	9,210	73,950		61,440
USSR	67,318				
LEBANON		14,150	217,500		
TURKEY	7,389	5,000			
YUGOSLV					10,450
JORDAN		30,000			
ISRAEL	31,200				
ICELAND	9,840	23,068			
PARAGUA		11,850			
TOTAL	123,926,265	126,771,119	123,213,425	131,961,727	117,247,069

SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

Table 3.--Shrimp, peeled, in airtight containers: U.S. imports for consumption, by country, 1971-75

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
INDIA	1,612,946	422,100	1,715,788	3,352,571	124,098
MALAYSA	8,190	24,000	53,860	700,655	97,371
PAKISTN	100,250	104,900	223,895	288,223	56,425
CHINA T	500	53,690	272,838	224,381	180,198
THAILND	19,078	4,316	32,364	216,896	70,123
BRAZIL	32,159	35,524	102,039	211,337	36,972
KOR REP	6,000	6,747	10,477	187,712	32,386
REP SAF				149,500	
KUWAIT				141,500	
SWEDEN	7,819	1,905	1,300	82,293	
CANADA	440	58,356	7,263	61,713	27,132
BELIZE				58,800	
PHIL R	29,257	67,690	94,267	56,289	57,984
INDNSIA	20,397			55,541	
COLOMB		12,000		50,832	13,550
JAPAN	47,668	57,784	28,619	45,634	18,582
S VETNM				36,694	48,181
ICELAND	5,445		9,958	34,175	96,346
CHILE	750			32,651	
DENMARK	29,956	26,427	18,290	31,741	13,792
SINGAPR	17,100	957	23,500	22,000	400
HG KONG	5,520	7,228	9,967	20,510	7,284
CHINA M				16,687	3,870
AUSTRAL	87,002		12,500	14,080	
NORWAY	7,817	12,264	11,303	7,353	4,807
SPAIN	19,858	6,381	247	2,647	
GREENLD	6,000			2,063	
U KING		846	4,510	1,095	455
MEXICO	51,202	9,300	83,460	675	2,000
W GERM	100			656	
NETHLDS		169	2,302	506	
AUSTRIA		405			
IRAN					102,478
N VETNM			617		
GUATMAL			6,400		
PERU	4,200				
VENEZ	152,161	36,950	243,860		
DOM REP					3,575

Table 3.--Shrimp, peeled, in airtight containers: U.S. imports for consumption, by country, 1971-75--Continued

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
ECUADOR	421,005	30,977	11,470		64,640
F GUIAN		30,820			
HONDURA	29,600	660			
NICARAG	5,254	70,290			3,100
C RICA	14,450		45,150		
SRI LKA	250				
BAHAMAS			920		
IVY CST					9,950
CAMROON					41,898
LIBERIA		40,450			
TOTAL	2,742,374	1,123,136	3,027,164	6,107,410	1,117,597

SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

Table 4.--SHRIMP, PEELED, RAW, NOT IN AIRTIGHT CONTAINERS: U.S. IMPORTS FOR CONSUMPTION, BY COUNTRY, 1971-75

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
MEXICO	27,196,457	32,573,543	29,697,015	30,781,144	25,422,641
INDIA	17,061,222	29,454,793	16,017,237	22,996,964	26,001,839
INDNSIA		1,110,087	1,711,516	3,620,213	816,221
NICARAG	2,611,750	3,392,194	3,344,651	3,582,719	1,559,285
SALVADR	2,459,986	2,346,733	1,910,099	3,184,123	3,553,594
CHINA T	176,010	4,039,895	3,982,957	2,982,525	3,556,127
THAILND	1,218,632	2,532,192	2,077,619	1,638,548	1,389,218
AUSTRAL	964,161	970,015	329,757	1,426,238	317,998
C RICA	557,060	677,150	782,868	1,308,955	1,446,662
S VETNM			136,500	1,072,758	933,205
ECUADOR	828,888	539,685	646,768	996,504	1,416,557
PANAMA	861,811	779,007	551,082	945,273	608,720
COLOMB	589,332	939,176	647,382	867,850	1,219,048
PAKISTN	1,187,496	1,286,820	785,666	844,929	821,943
BRAZIL	587,130	2,830,609	1,103,395	779,334	238,218
HG KONG	43,580	262,852	166,625	625,141	1,288,926
GUATMAL	262,168	201,890	550,020	567,975	521,470
LIBERIA	103,424	486,169	658,771	557,700	94,080
SRI LKA	26,260	152,820	415,119	489,262	142,430
MALAYSA	135,231	1,801,750	1,451,448	427,925	116,220
CAMROON	181,200	230,000	412,568	418,077	487,984
HONDURA	426,203	388,624	1,232,070	374,331	342,618
CHINA M		43,594	34,560	325,225	626,671
SINGAPR	47,285	224,751	344,381	300,840	286,442
PHIL R	69,249	182,548	222,362	226,276	186,334
IVY CST	58,050	26,500	90,288	203,862	
CHILE	31,750	67,446		202,465	40,000
VENEZ	387,385	264,400	81,475	194,750	92,910
GUYANA	140,476	253,264	122,750	179,812	411,250
JAPAN	88,761	477,078	74,639	165,228	387,307
KUWAIT	160,528	99,986	456,030	156,948	195,610
TRINID	9,894	39,071	138,443	143,620	391,150
REP SAF		326,399	398,639	109,478	153,663
BNGLDSH		62,500	57,200	107,550	242,382
F GUIAN	716,891	386,208	131,365	100,081	18,908
NETHLDS			170,395	84,346	140,420
BARBADO			2,450	66,450	111,300

Table 4.--Shrimp, peeled, raw, not in airtight containers: U.S. imports for consumption, by country, 1971-75--Continued

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
KOR REP			9,739	54,194	172,651
CANADA	44,028	42,408	40,475	40,306	30,859
U KING	6,810	100,000		14,730	126,052
IRELAND				8,100	
PERU	64,750	59,400	900	6,600	14,550
MACAO				4,000	
SURINAM	477,496	71,496	64,440	2,412	9,824
N ANTIL				1,000	
BAHRAIN					160,934
BELIZE		7,340	2,760		
BAHAMAS	970	4,720			
FR P IS			273		
HAITI	436	6,280			
JAMAICA		1,505			
CANAL Z	41,922	37,234			
N ZEAL	203,700	4,200			
S ARAB					125,700
ICELAND	36,785				9,996
ARGENT		84,640	38,560		9,468
SWEDEN		47,288	37,490		2,380
NORWAY			1,120		
PARAGUA		34,100			
DENMARK	4,347	3,713	337		94
SPAIN	50,137	50,100	10,000		56,560
TURKEY		2,502			
ARABIA	9,500				11,800
IRAN	18,450	85,050	14,950		211,437
AUSTRIA		3,450			
NIGERIA			261,800		138,161
MALAGAS	10,000	47,696			
TOTAL	60,157,601	90,142,871	71,418,954	83,186,761	76,659,817

SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

Table 5.--Shrimp, peeled, not specially provided for: U.S. imports for consumption, by country, 1971-75

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
CHINA T	12,888	697,027	579,494	1,025,488	982,779
INDIA	1,055,678	316,245	563,935	961,348	1,265,739
SINGAPR	108,056	24,560	284,769	564,169	59,953
THAILND	157,780	293,639	334,517	491,315	840,824
INDNSIA		650	36,300	466,641	91,737
MALAYSA	94,535	408,717	281,637	420,725	140,600
BRAZIL	101,720	395,032	55,920	390,672	2,736
S VETNM			31,890	248,083	50,853
JAPAN	211,536	138,027	131,903	232,526	128,384
PHIL R	28,560	92,076	108,614	211,506	86,990
HG KONG	14,256	111,384	102,126	208,251	205,153
AUSTRAL	287,434	90,220	74,733	202,530	123,628
CHINA M		2,490	3,965	163,040	139,685
PANAMA	559,856	77,310	6,280	144,580	72,151
COLOMB		21,150	167,870	118,219	61,440
SAL VADR	138,350	36,100	35,930	98,218	125,703
KOR REP	2,872	49,264	32,124	96,356	77,580
N ZEAL				94,900	
LIBERIA				69,708	120,880
ECUADOR	40,440	133,268	46,655	63,262	52,912
CANADA	38,127	37,618	29,371	60,552	7,074
TRINID	16,606			56,291	75,280
C RICA			19,700	39,721	41,500
CHILE		27,300	42,154	37,328	38,752
GUYANA	5,550	92,300		33,700	
F GUIAN	12,400	9,800	30,354	32,900	49,980
PAKISTN	6,550	11,550	58,570	28,893	
KUWAIT				27,486	4,090
ETHIOP	21,546			21,296	
MEXICO	76,250	5,724	18,942	13,628	45,406
SPAIN	156,736	5,450		11,450	
NICARAG	40,050	66,360	33,255	10,000	112,388
VENEZ	26,400	21,800		9,330	
HONDURA	2,280	56,600		9,300	9,720
IRAN				8,080	
BNGLDSH			32,900	7,750	4,850
GREENLD	7,680	117,594	8,400	6,000	5,040

Table 5.--Shrimp, peeled, not specially provided for: U.S. imports for consumption, by country, 1971-75-Continued

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
SRI LKA			4,940	5,650	
DOM REP				3,450	
SWEDEN		349,598	210,744	2,976	1,519
NORWAY	3,234	1,406	1,875	2,747	
U KING		21,044		1,880	
DENMARK		32,095		239	
IVY CST					22,046
NETHLDS		1,235	17,250		
W GERM			4,601		
ICELAND	990		253		
SURINAM			600		
MALAGAS		121,200	291,200		
GUINEA			19,550		
CAMROON			73,544		
NEW GUI	51,000				
BELIZE			97,870		
GUATMAL			50.550		152,072
NIGERIA					40,650
GHANA					2,991
TOTAL	3,279,360	3,865,833	3,925,285	6,702,184	5,243,085

SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

Table 6.--Shrimp, breaded, not in airtight containers: U.S. imports for consumption, by country, 1971-75

(In pounds)

COUNTRY	1971	1972	1973	1974	1975
MEXICO	1,062,776	1,114,772	870,378	858,766	977,388
CANADA	120,770	120,920	79,765	35,851	47,213
THAILND			2,500	21,000	45,188
JAPAN	2,825	3,307	3,055	20,414	48,000
U KING				6,100	1,400
AUSTRAL		3,408		5,140	
HG KONG	120		3,440	3,648	240
DOM REP				1,330	
PHIL R			1,140	1,002	2,700
CHINA T		19,500			
INDIA	20,250	2,300			6,000
TRINID					23,050
HONDURA		43,250			
MALAYSA	450				
KOR REP					8,680
PANAMA	5,000				
C RICA		9,650			
COLOMB			16,800		
SINGAPR					9,740
F GUIAN					9,800
ECUADOR		4,850			
BRAZIL			598		
DENMARK		1,125			
INDNSIA					10,320
TOTAL	1,212,191	1,323,082	977,676	953,251	1,189,719

SOURCE: COMPILED FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

Table 7.--Shrimp, shell-on: U.S. imports for consumption, by principal source 1964-75

(In thousands of pounds)

Year	Mexico	Panama	Venezuela	Colombia	Other	Totals
1964	55,914	7,854	7,749	1,384	39,248	112,149
1965	43,86	5,681	9,967	1,612	53,053	114,177
1966	54,014	8,072	1,925	2,069	63,839	129,919
1967	54,294	8,851	3,509	2,408	62,865	131,927
1968	39,641	9,182	4,195	2,754	72,270	128,042
1969	33,797	8,541	5,591	3,491	69,873	121,293
1970	44,780	10,321	11,198	4,426	69,253	139,978
1971	46,237	7,890	9,517	4,252	56,030	123,926
1972	46,978	9,248	7,671	5,007	57,867	126,771
1973	45,435	9,825	5,389	5,200	57,464	123,312
1974	46,455	9,016	6,292	5,139	65,060	131,962
1975	48,569	9,106	4,820	4,418	50,334	117,247

Source: Compiled from official statistics of the U.S. Department of Commerce

Table 8.--Shrimp, peeled, raw, not in airtight containers, and not breaded: U.S. imports for consumption, by principal source, 1964-75

(In thousands of pounds)

Year	India	Mexico	Nicaragua	Indonesia	Other	Total
1964	5,017	14,978	29	37	7,324	27,385
1965	7,419	14,472	751	7	9,312	31,961
1966	11,087	13,456	929	-	11,761	37,233
1967	11,645	13,626	1,242	21	12,425	38,959
1968	14,842	18,190	1,949	71	12,399	47,451
1969	27,819	21,388	2,095	71	12,419	63,792
1970	26,197	25,779	2,274	156	15,095	69,501
1971	17,061	27,196	2,612	-	13,289	60,158
1972	29,455	32,574	3,392	1,110	23,612	90,143
1973	16,017	29,697	3,345	1,712	20,648	71,419
1974	22,997	30,781	3,583	3,620	22,206	83,187
1975	26,002	25,423	1,559	816	22,860	76,660

Source: Compiled from official statistics of the U.S. Department of Commerce

Table 9.--Shrimp, peeled, in airtight containers: U.S. imports for consumption, by principal source, 1964-75

(In thousands of pounds)

Year	India	Malaysia	Pakistan	Thailand	Other	Total
1964	1,273	-	96	-	1,635	3,004
1965	1,253	-	92	-	903	2,248
1966	1,100	-	92	-	355	1,547
1967	1,523	-	257	56	389	2,225
1968	2,755	-	225	69	1,258	4,307
1969	2,029	35	166	74	1,279	3,583
1970	2,581	7	387	29	872	3,876
1971	1,613	8	100	19	1,002	2,742
1972	422	24	105	4	568	1,123
1973	1,716	54	224	32	1,001	3,027
1974	3,353	701	288	217	1,548	6,107
1975	124	97	56	70	771	1,118

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 10.--Shrimp, peeled, other than in airtight containers, raw or breaded: U.S. imports for consumption, by principal source, 1964-75

(In thousands of pounds)

Year	Taiwan	India	Thailand	Japan	Other	Total
1964	-	1,116	-	1,656	8,759	11,531
1965	59	1,451	42	1,728	10,497	13,777
1966	227	1,800	160	1,336	5,801	9,324
1967	212	2,323	220	741	8,636	12,132
1968	134	1,874	375	791	4,914	8,088
1969	290	912	27	703	1,882	3,814
1970	209	531	94	327	2,785	3,946
1971	13	1,056	158	212	1,840	3,279
1972	697	316	294	138	2,421	3,866
1973	579	564	335	132	2,315	3,925
1974	1,025	961	491	233	3,992	6,702
1975	983	1,263	841	128	2,025	5,243

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 11.--Shrimp, peeled, breaded: U.S. imports for consumption, by principal source, 1964-75

(In thousands of pounds)

Year	Mexico	Canada	Japan	Thailand	Other	Total
1964	498	11	-	-	-	508
1965	763	14	-	-	1	778
1966	523	3	-	-	1	527
1967	815	3	-	-	12	830
1968	680	38	-	-	849	1,567
1969	845	319	10	-	86	1,260
1970	1,010	366	3	11	24	1,414
1971	1,063	121	3	-	25	1,212
1972	1,115	121	3	-	84	1,323
1973	870	80	3	2	23	978
1974	859	36	20	21	17	953
1975	977	47	48	45	73	1,190

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 12.--Shrimp: U.S. imports for consumption, by kinds, by months, January 1973-December 1975

(In thousands of pounds) 1/

Year and month	Shell-on	Peeled shrimp				
		Not in airtight containers				In airtight containers
		Not breaded		Breaded		
		Raw	Other			
1973:						
January	10,623	5,427	241	118		112
February	8,773	5,517	248	141		159
March	9,318	4,402	317	131		228
April	10,302	4,421	194	56		241
May	9,432	4,423	174	121		391
June	8,451	4,656	151	98		267
July	8,349	5,852	223	1		310
August	8,463	7,077	363	51		94
September	9,754	5,997	231	15		172
October	16,663	8,609	751	76		310
November	12,328	8,321	638	87		303
December	10,757	6,717	394	83		440
Total	123,213	71,419	3,925	978		3,027
1974:						
January	14,297	9,221	872	119		835
February	10,420	8,855	430	147		1,053
March	9,554	6,571	621	53		784
April	8,772	5,180	601	56		800
May	9,246	7,292	633	73		423
June	7,918	6,810	614	44		676
July	7,868	5,802	515	122		539
August	8,831	5,913	512	4		431
September	10,009	6,080	526	34		248
October	18,199	5,721	609	86		114
November	15,586	7,990	533	143		105
December	11,262	7,752	236	74		99
Total	131,962	83,187	6,702	953		6,107
1975:						
January	13,132	7,121	272	117		291
February	7,268	5,827	248	137		133
March	7,090	4,535	576	124		125
April	7,050	4,472	305	95		154
May	7,924	4,256	350	26		84
June	10,033	5,355	785	116		55
July	8,316	7,215	399	81		53
August	6,895	6,742	350	149		14
September	8,972	8,562	220	71		57
October	14,705	7,682	744	94		45
November	14,189	7,609	439	127		57
December	11,673	7,284	555	53		50
Total	117,247	76,660	5,243	1,190		1,118

1/ Data reported on a product-weight basis, except for those of shell-on shrimp, which are reported on a heads-off, shell-on basis.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 13.--Shrimp, fresh or frozen: U.S. exports of domestic merchandise, by principal markets, 1971-75

Year	Mexico	Canada	Japan	United Kingdom	Other	Total
	Quantity (1,000 pounds 1/)					
1971	10,271	6,134	3,568	2,349	7,681	30,003
1972	10,072	7,748	2,625	1,967	6,573	28,985
1973	9,372	8,048	8,426	2,009	9,579	37,434
1974	9,619	6,680	3,369	1,890	6,170	27,728
1975	8,741	7,509	4,862	1,327	5,638	28,077
	Value (1,000 dollars)					
1971	7,933	7,501	5,650	2,231	7,371	30,686
1972	8,329	10,137	4,284	2,370	7,214	32,334
1973	8,761	11,928	15,180	2,805	13,796	52,470
1974	14,292	11,773	6,919	3,678	10,678	47,340
1975	15,735	15,224	12,788	1,438	8,896	54,081

1/ Product weight.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 14.--Shrimp in airtight containers: U.S. exports of domestic merchandise, by principal markets, 1971-75

Year	Canada	Mexico	Japan	United Kingdom	Other	Total
	Quantity (1,000 pounds 1/)					
1971	4,932	-	-	1,672	1,730	8,334
1972	4,956	-	152	1,651	1,691	8,450
1973	6,200	-	975	1,141	1,633	9,949
1974	4,311	58	107	815	1,594	6,885
1975	4,777	700	-	624	122	6,223
	Value (1,000 dollars)					
1971	5,593	-	-	1,771	1,914	9,278
1972	6,567	-	146	1,828	2,188	10,729
1973	8,386	-	1,346	1,798	2,942	14,472
1974	7,171	81	245	1,353	2,980	11,830
1975	8,063	700	-	711	789	10,263

1/ Product weight.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 15.--Shrimp: U.S. exports, by types, 1971-75

(Quantity shown on a product-weight basis)

Item	1971	1972	1973	1974	1975
Fresh and frozen:					
Quantity, total--					
------1,000 pounds--	40,478	35,029	47,646	34,111	34,664
Domestic------do------	30,003	28,984	37,434	27,728	28,078
Foreign-------do------	10,475	6,095	10,212	6,383	6,586
Value----1,000 dollars--	46,070	42,258	72,433	59,353	70,581
In airtight containers:					
Quantity, total--					
------1,000 pounds--	8,334	8,458	9,991	6,921	6,227
Domestic------do------	8,334	8,450	9,949	6,885	6,223
Foreign-------do------	-	8	42	36	4
Value----1,000 dollars--	9,278	10,739	14,529	11,903	10,269
Total:					
Quantity, total--					
------1,000 pounds--	48,812	43,537	57,637	41,932	40,891
Domestic------do------	38,337	37,434	47,383	34,613	34,301
Foreign-------do------	10,475	6,103	10,254	6,419	6,590
Value----1,000 dollars--	55,348	52,997	86,962	71,256	80,850

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 16.--Ex-vessel prices per pound of raw headless shrimp, by months, January 1968-October 1975 1/

Year and month	Count per pound			Year and month	Count per pound		
	21-25	31-40	51-67		21-25	31-40	51-67
1968				1972			
January	$1.02	$0.73	$0.47	January	$1.88	$1.24	$0.79
February	1.05	.74	.47	February	1.93	1.30	.79
March	1.07	.77	.52	March	1.86	1.32	.78
April	1.13	.81	.56	April	1.87	1.36	.82
May	1.17	.85	.59	May	1.87	1.36	.70
June	1.17	.81	.48	June	1.80	1.23	.67
July	1.13	.70	.47	July	1.79	1.22	.80
August	1.11	.77	.49	August	1.56	1.20	.81
September	1.14	.86	.52	September	1.55	1.24	.75
October	1.18	.88	.54	October	1.57	1.29	.86
November	1.16	.85	.50	November	1.54	1.28	.84
December	1.09	.79	.48	December	1.51	1.30	.78
1969				1973			
January	1.12	.82	.48	January	1.63	1.33	.71
February	1.16	.86	.53	February	1.71	1.48	.90
March	1.18	.89	.56	March	1.83	1.57	1.01
April	1.21	.93	.63	April	1.88	1.62	1.09
May	1.23	.95	.67	May	1.95	1.68	1.16
June	1.20	.94	.55	June	1.97	1.64	1.17
July	1.19	.89	.57	July	2.11	1.68	1.27
August	1.20	.87	.57	August	2.37	1.94	1.43
September	1.22	.95	.62	September	2.62	2.05	1.44
October	1.16	.94	.59	October	2.52	1.87	1.22
November	1.13	.94	.56	November	2.62	1.93	1.22
December	1.13	.94	.58	December	2.68	1.88	1.19
1970				1974			
January	1.16	.99	.62	January	2.60	1.72	.96
February	1.18	.98	.62	February	2.24	1.44	.91
March	1.18	.98	.64	March	2.20	1.41	.88
April	1.18	.96	.60	April	2.22	1.41	.91
May	1.16	.95	.57	May	2.19	1.31	.74
June	1.17	.85	.43	June	2.20	1.18	.65
July	1.13	.71	.48	July	2.12	1.09	.67
August	1.13	.77	.48	August	1.72	1.06	.67
September	.99	.75	.48	September	1.47	1.11	.74
October	1.03	.77	.46	October	1.65	1.24	.80
November	1.05	.80	.46	November	1.51	1.18	.78
December	1.06	.80	.47	December	1.47	1.16	.77
1971				1975			
January	1.12	.83	.47	January	1.59	1.26	.84
February	1.22	.89	.52	February	1.82	1.46	.98
March	1.34	.97	.60	March	2.07	1.63	1.13
April	1.40	1.04	.54	April	2.32	1.84	1.28
May	1.46	1.07	.72	May	2.65	2.08	1.37
June	1.53	1.04	.64	June	2.55	1.95	1.23
July	1.58	.98	.62	July	2.51	1.94	2/
August	1.60	1.07	.72	August	2.62	2.06	2/
September	1.57	.99	.64	September	2.79	2.18	2/
October	1.57	1.02	.66	October	2.87	2.34	2/
November	1.69	1.10	.69				
December	1.79	1.16	.77				

1/ Weighted average, all species, South Atlantic and gulf.
2/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 17.--Shrimp: Indexes of ex-vessel U.S. prices, by months, January 1970-August 1975

(1967=100)

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1970	117.0	132.7	126.2	127.9	118.4	123.8	115.4	118.4	103.1	104.4	104.6	104.9
1971	104.9	112.5	124.6	143.3	148.0	132.8	147.3	146.6	153.2	141.9	150.8	159.5
1972	158.1	163.8	159.4	172.4	161.6	150.6	154.7	141.1	140.3	147.1	142.3	142.9
1973	146.7	159.8	168.6	179.2	181.9	182.3	193.1	219.0	229.4	220.4	230.6	229.4
1974	216.0	192.0	192.5	191.4	182.6	174.5	167.6	158.4	151.4	162.7	149.1	132.6
1975	155.1	173.8	191.4	216.6	227.2	227.6	213.7	232.9				

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 18.--Wholesale prices per pound of imports of shrimp from the Persian Gulf at New York, by months, January 1970-November 1975

Year and month	Count per pound			Year and month	Count per pound		
	Under 15	26-30	41-50		Under 15	26-30	41-50
1970				1973			
January	1/	$1.27	$0.91	January	$1.95	$1.65	$1.22
February	$1.54	1.26	.90	February	2.01	1.86	1.38
March	1.53	1.26	.89	March	2.05	1.93	1.47
April	1/	1.27	.91	April	1/	1/	1/
May	1/	1.28	.92	May	1/	1/	1/
June	1/	1.24	.93	June	1/	1/	1/
July	1/	1.18	.80	July	1/	1/	1/
August	1/	1/	1/	August	1/	1/	1/
September	1/	1/	.79	September	1/	1/	1.90
October	1/	1.14	.79	October	1/	1/	1.83
November	1/	1.17	.79	November	1/	2.55	1.82
December	1/	1.14	.80	December	3.33	2.73	1.70
1971				1974			
January	1/	1.18	.81	January	3.30	2.70	1.59
February	1/	1.21	.86	February	3.35	2.56	1.43
March	1/	1.30	.96	March	3.25	2.46	1.25
April	1.91	1.32	1.03	April	3.25	2.30	1.21
May	2.01	1.43	1.14	May	1/	2.26	1.15
June	2.09	1.49	1.06	June	1/	2.30	1.02
July	2.11	1.46	.95	July	3.45	2.18	.96
August	2.30	1.68	1.08	August	3.45	1.88	1.00
September	1/	1.60	1.01	September	1/	1.64	1.08
October	2.35	1.61	1.05	October	1/	1.71	1.21
November	1/	1/	1/	November	1/	1.75	1.25
December	1/	1.80	1.15	December	2.43	1.60	1.23
1972				1975			
January	2.46	1.79	1.18	January	2.33	1.65	1.26
February	2.50	1.80	1.20	February	1/	1.80	1.40
March	2.55	1.98	1.20	March	1/	1/	1/
April	1/	1/	1/	April	1/	1/	1/
May	1/	1/	1/	May	1/	1/	1/
June	2.36	1.97	1.16	June	1/	1/	1/
July	2.34	1.90	1.09	July	1/	2.63	1.85
August	2.10	1.86	1.10	August	1/	1/	1/
September	2.00	1.80	1.15	September	1/	1/	1/
October	2.00	1.77	1.17	October	1/	3.00	2.05
November	1.97	1.76	1.18	November	1/	3.05	1/
December	1.95	1.68	1.18				

1/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 19.--Wholesale prices per pound of imports of shrimp from India, Pakistan, and Indonesia at New York, by months, January 1970-November 1975

Year and month	Count per pound			Year and month	Count per pound		
	Under 15	26-30	41-50		Under 15	26-30	41-50
1970				1973 2/			
January	$1.47	$1.20	$0.86	January	1/	$1.56	1/
February	1.47	1.19	.86	February	1/	1.63	$1.15
March	1.47	1.19	.88	March	$1.85	1.59	1.20
April	1.47	1.19	.88	April	1/	1/	1/
May	1/	1/	1/	May	1/	1/	1/
June	1/	1.25	.80	June	1/	1/	1/
July	1/	1.10	.78	July	1/	1/	1/
August	1/	1.09	1/	August	1/	1/	1/
September	1/	1.04	1/	September	1/	1/	1/
October	1.48	1.09	.73	October	2.75	2.52	2.10
November	1.50	1.11	.74	November	1/	1/	1/
December	1.20	.90	1/	December	2.70	2.60	1.75
1971 2/				1974			
January	1/	1.09	.72	January	1/		[redacted]
February	1.58	1.13	.79	February	3.25	2.50	1.43
March	1.60	1.15	.78	March	3.05	2.33	1.24
April	1.79	1.24	1/	April	3.03	2.26	1.18
May	1/	1/	1/	May	3.13	2.18	1.09
June	1/	1/	1/	June	3.18	2.09	.96
July	1/	1/	1/	July	3.20	2.14	.94
August	1/	1/	1/	August	3.21	1.88	.97
September	1/	1/	1/	September	1/	1.60	1.08
October	1/	1/	1/	October	3.00	1.67	1.17
November	1/	1/	1/	November	2.80	1.61	1.19
December	1/	1/	1/	December	2.53	1.62	1.17
1972 2/				1975			
January	2.40	1.70	1/	January	2.22	1.64	1.20
February	1/	1/	1/	February	2.46	1.80	1.83
March	1/	1.85	1/	March	2.65	2.00	1.47
April	1/	1/	1/	April	2.81	2.20	1/
May	1/	1/	1/	May	3.01	2.69	2.08
June	1/	1.93	1.12	June	2.95	2.67	1.92
July	2.30	1.80	1.05	July	3.03	2.75	1.84
August	1.99	1.80	1.03	August	3.08	2.71	1.87
September	1/	1.79	1.09	September	3.41	2.76	1.88
October	1.98	1.73	1.10	October	3.51	2.85	1.99
November	1.85	1.50	1/	November	3.55	2.95	2.00
December	1.95	1.62	1/				

1/ Not available.
2/ From India only.

Source: Compiled from official statistics of the U.S. Department of Commerce.

'able 20.--Wholesale prices per pound of imports of shrimp from South American sources at New York, by months, January 1970-November 1975

Year and month	Count per pound			Year and month	Count per pound		
	Under 15	26-30	41-50		Under 15	26-30	41-50
1970				1973			
anuary----	$1.57	$1.29	$0.93	January---	$2.07	$1.85	$1.29
ebruary---	1.57	1.30	.94	February--	2.12	1.88	1/
arch------	1.57	1.31	.95	March-----	2.25	2.00	1.51
pril------	1.57	1.31	.95	April-----	2.33	2.07	1.68
ay--------	1.62	1.36	.98	May-------	2.38	2.16	1.75
une-------	1.63	1.27	.92	June------	2.43	2.22	1.78
uly-------	1.60	1.21	.80	July------	2.46	2.23	1.68
ugust-----	1.61	1.22	.83	August----	2.74	2.45	1.80
eptember--	1.62	1.20	.84	September-	3.02	2.69	1/
ctober----	1.63	1.21	.83	October---	3.06	2.64	1.88
ovember---	1.70	1.20	.84	November--	3.19	2.69	1.90
ecember---	1.70	1.19	.84	December--	3.38	2.77	1.95
1971				1974			
anuary----	1.77	1.21	.84	January---	3.36	2.74	1.85
e[illegible]ary---	1.82	1.24	.90	February--	3.38	2.58	1.53
arch------	1.90	1.33	1.06	March-----	3.25	2.43	1.23
pril------	2.00	1.42	1.08	April-----	3.32	2.31	1.18
ay--------	2.11	1.52	1.13	May-------	3.44	2.35	1.13
une-------	2.18	1.50	1.07	June------	3.59	2.34	1.01
uly-------	2.19	1.49	.95	July------	3.57	2.22	.99
ugust-----	2.29	1.65	1.05	August----	3.45	1.93	1.06
eptember--	2.31	1.65	1.07	September-	3.21	1.73	1.18
ctober----	2.30	1.64	1.08	October---	3.84	1.78	1.27
ovember---	2.41	1.77	1.14	November--	2.86	1.79	1.32
ecember---	2.48	1.82	1/	December--	2.61	1.77	1.30
1972				1975			
anuary----	2.54	1.93	1.20	January---	2.52	1.84	1.20
ebruary---	2.59	2.04	1.20	February--	2.65	2.01	1.32
arch------	2.54	2.06	1.22	March-----	2.78	2.22	1.43
pril------	2.52	2.06	1.28	April-----	2.85	2.48	1.64
ay--------	2.51	2.05	1.29	May-------	3.11	2.87	1.77
une-------	2.41	1.99	1.14	June------	3.10	2.85	1.72
uly-------	2.36	1.98	1.11	July------	3.08	2.73	1.64
ugust	2.21	1.85	1.16	August----	3.33	2.92	1.83
eptember	2.09	1.83	1.22	September-	3.50	2.99	1.77
ctober	2.12	1.83	1.26	October---	3.64	3.15	1.85
ovember	2.07	1.83	1.31	November--	3.81	3.27	1/
ecember	2.07	1.81	1.28				

1[illegible]ot available.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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1. Shrimps.

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