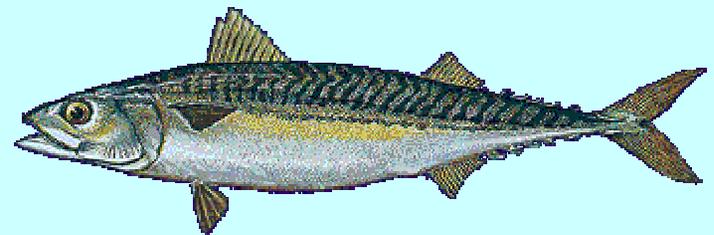


U.S. Seafood Exports Top Growth Markets and Products

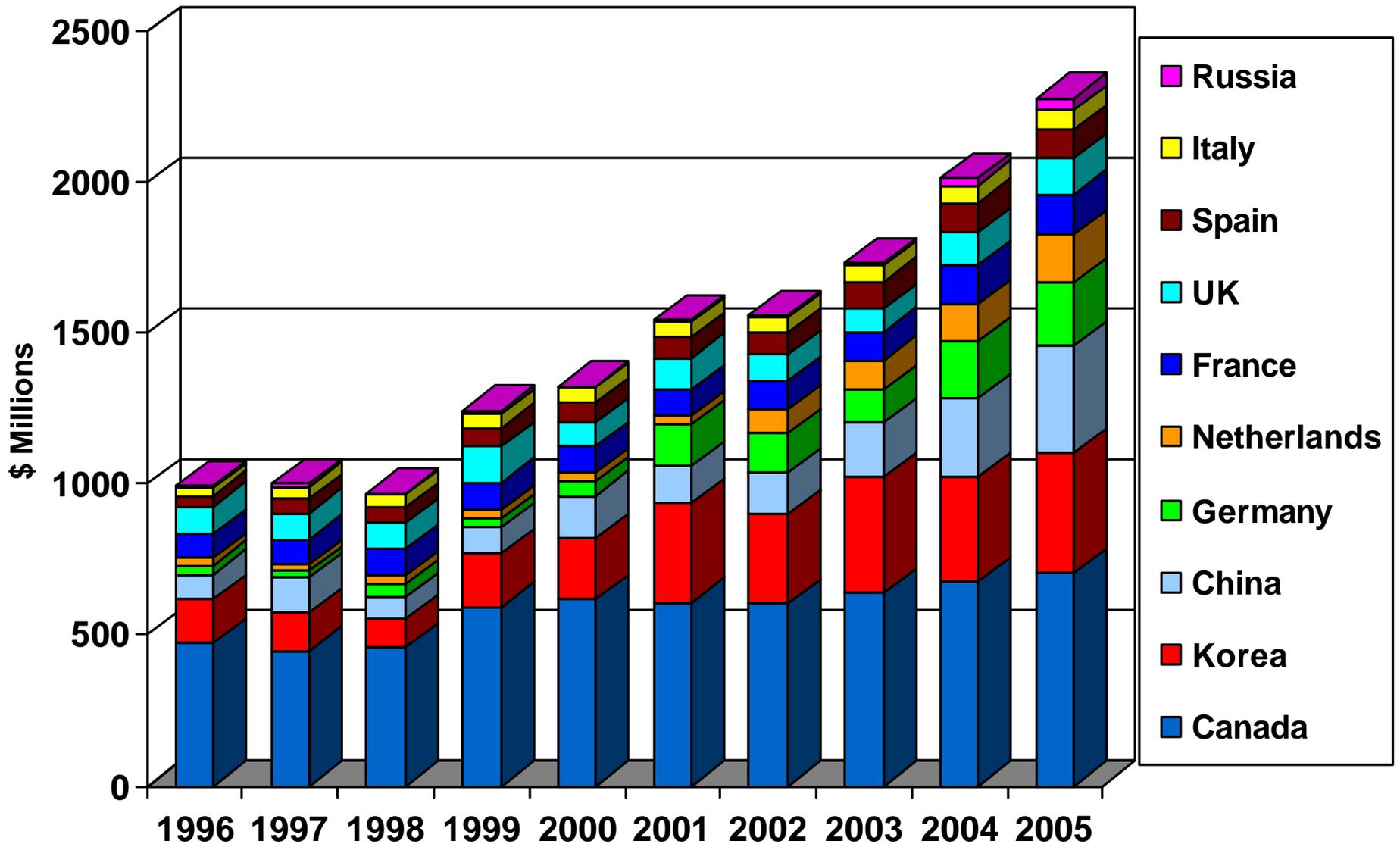
Joel Chetrick

USDA Foreign Agricultural Service

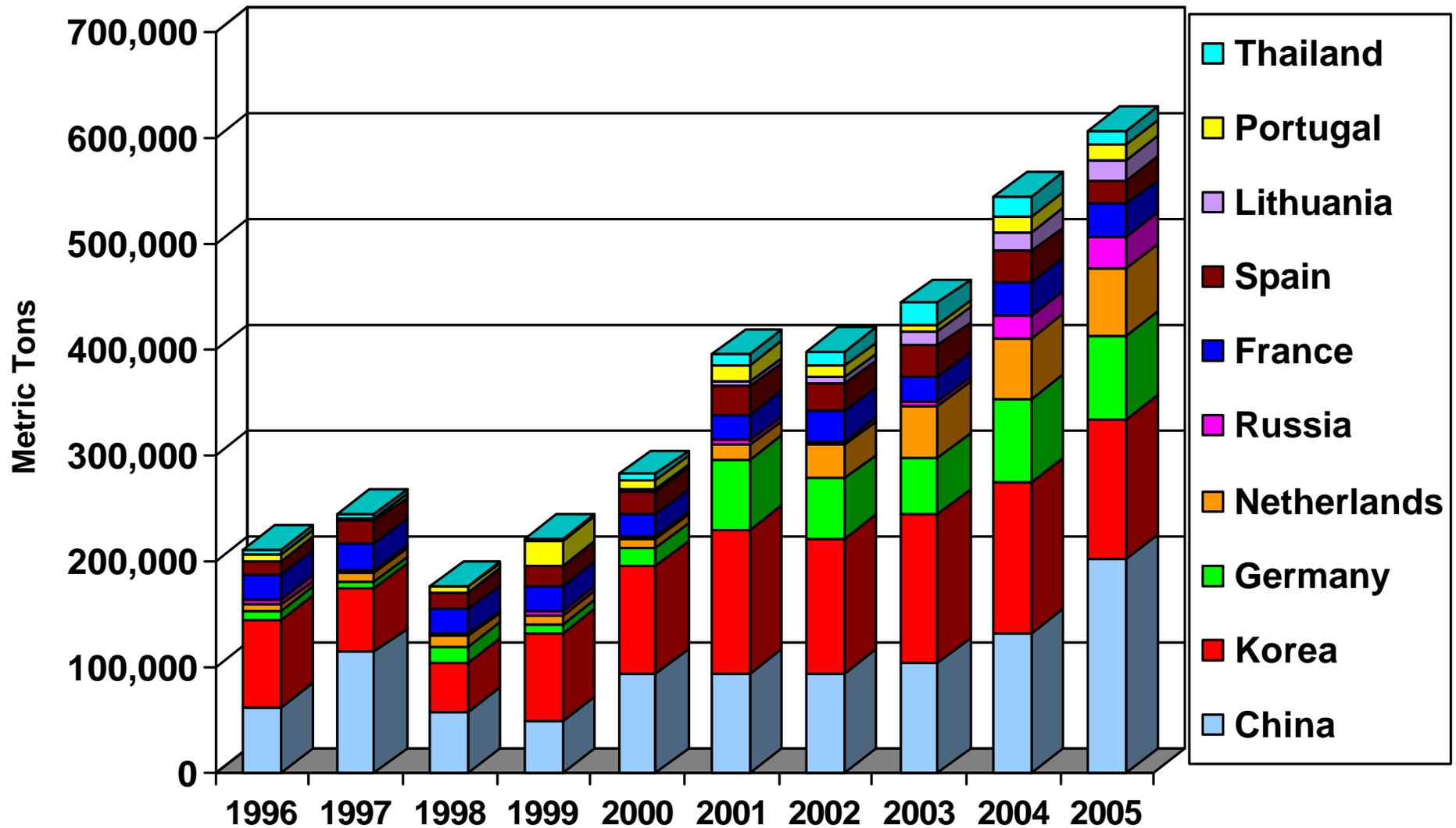
July 2006



Top 10 Growth Markets for U.S. Seafood by Value



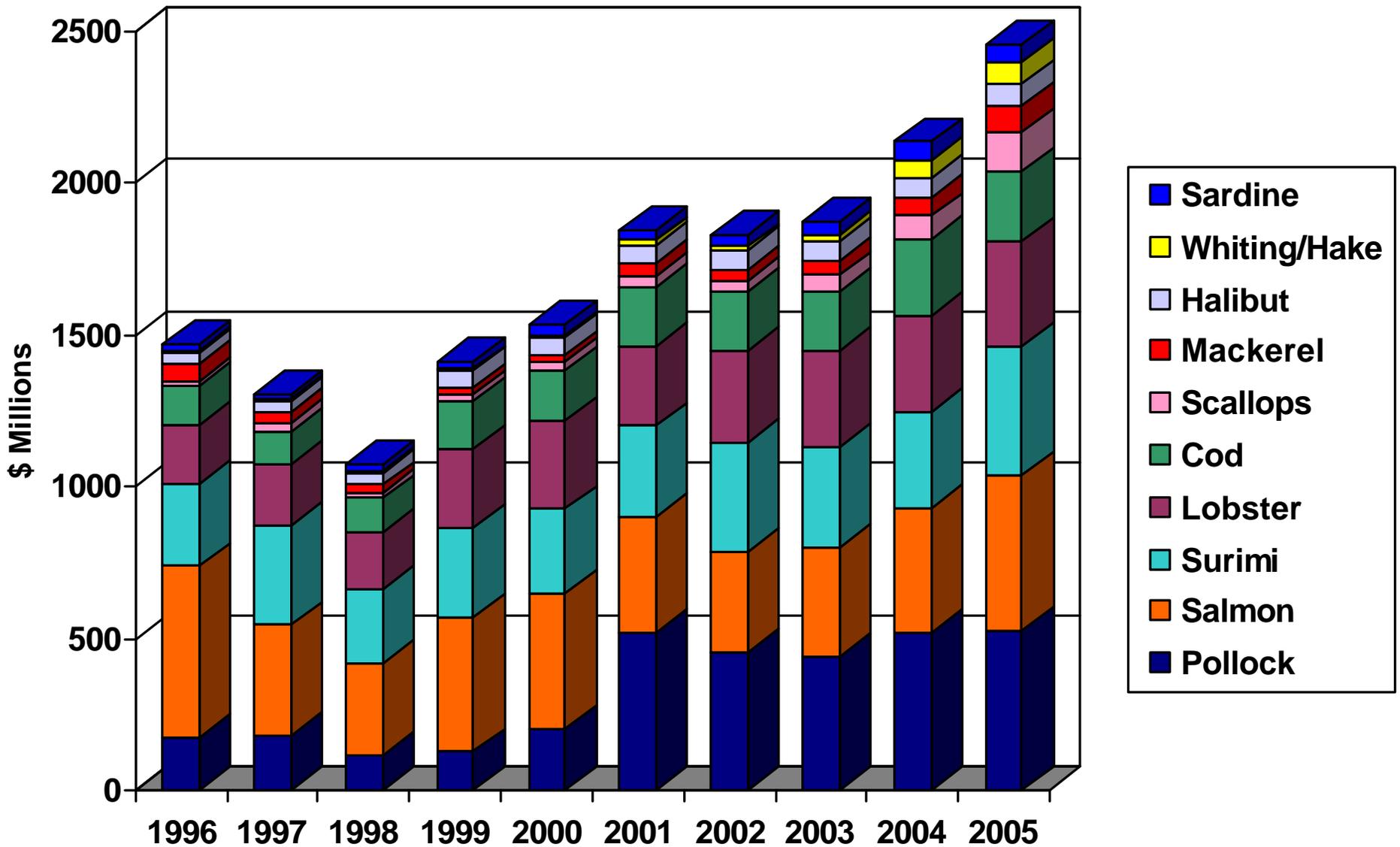
Top 10 Growth Markets for U.S. Seafood by Volume



Growth Markets – What's Behind the Numbers?

- Canada: large importer of premium products much of which is further processed and re-exported. Imports of high-value scallops are growing. Imports of lobster and halibut are increasing in value.
- Korea: increased sales of surimi and pollock
- China: large consumer and re-processor/exporter of seafood. Imports have increased for many species and products including salmon, cod, sole, crab, pollock, herring, fish meal, sardine, surimi and scallops.
- Germany: increased sales of pollock, surimi and salmon
- Netherlands: significant market and transshipment point for seafood, with growing imports of pollock, surimi, cod, salmon and scallops
- France: large importer of lobster and salmon, and a growing market for scallops, surimi and pollock
- United Kingdom: largest market for canned salmon, and a growing user of scallops, frozen Sockeye salmon and Coho salmon
- Spain: large importer of cod; growing market for lobster, surimi and whiting/hake
- Italy: growing market and largest European destination for lobster
- Russia: growing market for whiting/hake, frozen salmon and salmon roe
- Lithuania: growing importer of surimi and re-processor/exporter of surimi-base analogue seafood
- Portugal: large importer, consumer and re-processor/exporter of cod
- Thailand: growing importer and re-processor/exporter of salmon

Top 10 Growth Products for U.S. Seafood by Value



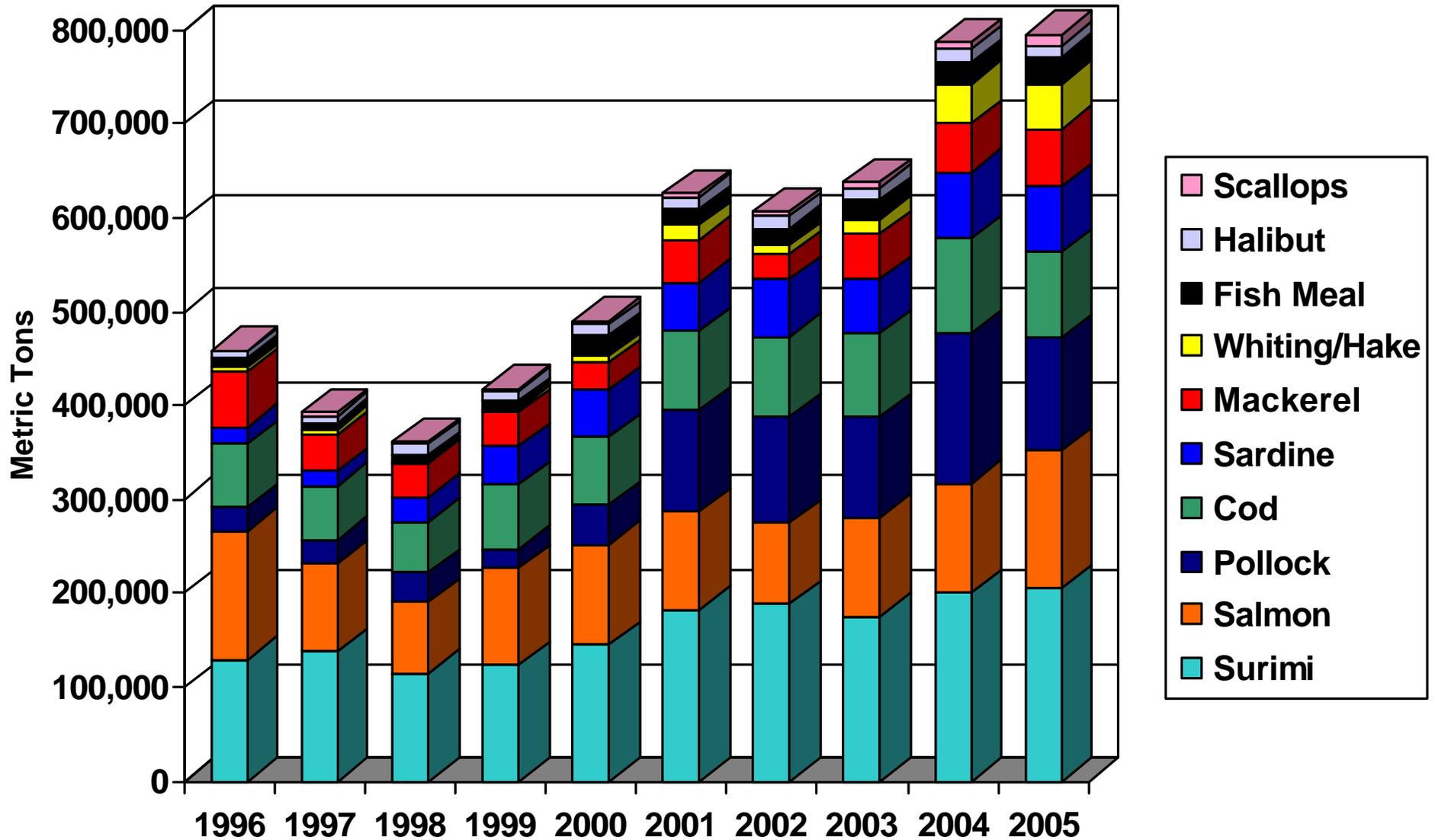
Growth Products – Where Are They Going? Exports by Regional Share (Value), 2005

	North America	European Union	Former Soviet Union	East Asia	Southeast Asia	All Other Regions
Pollock	1%	33%	*	65%	*	*
Salmon	13%	15%	3%	62%	5%	2%
Surimi	*	16%	*	83%	*	*
Lobster	49%	43%	*	6%	*	*
Cod	9%	33%	*	43%	2%	13%
Scallops	25%	54%	*	14%	4%	3%
Mackerel	3%	3%	6%	63%	3%	22%
Halibut	92%	2%	0%	6%	*	*
Whiting/Hake	*	44%	44%	7%	0%	5%
Sardine	1%	2%	2%	74%	2%	19%

See <http://www.fas.usda.gov/ustrade/ustlists/FASCntryGrp.asp?QI=> for lists of countries in defined regions.

* indicates less than 1%.

Top 10 Growth Products for U.S. Seafood by Volume



Growth Products – Where Are They Going? Exports by Regional Share (Volume), 2005

	North America	European Union	Former Soviet Union	East Asia	Southeast Asia	All Other Regions
Surimi	*	18%	*	81%	*	*
Salmon	12%	19%	4%	56%	6%	3%
Pollock	3%	63%	*	33%	*	*
Cod	8%	29%	*	49%	3%	11%
Sardine	1%	1%	2%	64%	1%	31%
Mackerel	3%	5%	6%	46%	3%	37%
Whiting/Hake	*	34%	55%	4%	0%	7%
Fish Meal	1%	*	5%	93%	*	*
Halibut	88%	3%	0%	9%	*	*
Scallops	26%	54%	*	13%	3%	4%