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Pacific Northwest Exports of Edible Fishery Products, 1987

by
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Abstract: Pacific Northwest exports of edible fishery products in 1987 totaled 606.8 million pounds (lb), or 275.243 metric tons (t), and were valued at \$1.2 billion, up 2.5 percent by quantity and 19 percent by value from a year earlier. The share of the Northwest portion of total U.S. fishery exports in 1987 was 78 percent, down slightly from 1986, but above the average 75 percent in the early 1980s. Pacific salmon (*Oncorhynchus* spp.) products dominated Northwest exports, comprising 59 percent by value, followed by assorted fresh or frozen finfish (15.7 percent), snow (Tanner) crab (*Chionoecetes* spp.) (9.3 percent), Pacific herring (*Clupea harengus pallasii*) products (7.5 percent), and king crab (*Paralithodes* spp.) (4.8 percent). In 1987, exports from the Northwest were shipped to 33 countries. Japan was the leading buyer with \$936.7 million or 76 percent of the total. Canada was a distant second at \$92.5 million or 7.5 percent, followed by the United Kingdom with \$58.4 million or 4.7 percent. The next three countries were France (4 percent), the Republic of Korea (2.6 percent), and Australia (1.2 percent).

PACIFIC-- NORTHWEST EXPORTS OF EDIBLE FISHERY PRODUCTS, 1987

by

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Abstract

Pacific Northwest exports of edible fishery products in 1987 totaled 606.8 million pounds (lb), or 275,243 metric tons (t), and were valued at \$1.2 billion, up 2.5% by quantity and 19% by value from a year earlier. The share of the-Northwest portion of total--U.S. fishery exports in 1987 was 78%, down slightly from 1986, but above the average 75% in the early 1980s. Pacific salmon (Oncorhynchus spp.) products dominated Northwest exports, comprising 59% by value, followed by assorted fresh or frozen finfish (15.7%), snow (Tanner) crab (Chionoecetes spp.) (9.3%), Pacific herring (Clupea harengus pallasii) products (7.5%), and king crab (Paralithodes spp.) (4.8%). In 1987, exports from the Northwest were shipped to 33 countries. Japan was the leading buyer with \$936.7 million or 76% of the total. Canada was a distant second at \$92.5 million or 7.5%, followed by the United Kingdom with \$58.4 million or 4.7%. The next three countries were France (4%), the Republic of Korea (2.6%), and Australia (1.2%). The six lading importing countries accounted for 96% of Northwest exports.

Sales by U.S. fishing vessels directly to foreign processing vessels or joint venture sales in waters off the Pacific Coast totaled 1.48 million-t (3.26 billion lb) with an estimated value of \$200.4 million. When joint venture sales are added to Pacific Northwest exports, the sum totals \$1.4. billion and comprises almost 80% of total U.S. exports.

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INTRODUCTION

Exportation of edible fishery products from the Pacific Northwest has made major contributions to both total U.S. fishery exports and the earnings of the fishing industry in the Northwest. This report compares exports from the Pacific Northwest to total U.S. fishery exports, reviews major products or product groups, shows the major countries purchasing fishery products, illustrates recent trends and patterns in exports including joint venture sales, and updates Kinoshita (1987).

In this report the Pacific Northwest is defined as the states of Oregon, Washington, and Alaska. The export data presented here are from the U.S. Department of Commerce, Bureau of the Census, and were accessed from the National Marine Fisheries Service (NMFS) data base maintained by the National Fishery Statistics Program, Washington, D.C.

Two methods of identifying Pacific Northwest fishery exports were considered. One method would have been to use data on exports of species harvested in Oregon, Washington, and Alaska waters. There are two serious problems associated with defining regional exports on the basis of species. Exports of species in the Northwest cannot be distinguished from similar species off the east coast or Gulf of Mexico states, and there are significant exports in the "other" category that include a large number of species from both the Northwest and other areas. The method used for this report employs data on exports shipped from customs districts of the three states. This method accounts for all shipments from the Northwest, but it also has two problems: It includes fishery products harvested or processed elsewhere but exported from the Northwest, and it excludes Northwest fishery products exported through other customs districts. Fishery products are

typically exported from the areas where they are harvested or processed; therefore, exports defined by customs districts tend to provide good estimates of Northwest fishery exports.

Although export categories are fairly specific, they cannot always be identified by a scientific name because a category may include several closely related genera, several unrelated species, or a family (Appendix Table 10).

NORTHWEST EXPORTS

Pacific Northwest exports of edible fishery products in 1987 were valued at \$1.2 billion, up 19% from a year earlier, and comprised 78% of the total value of edible fish products exported by the United States (Table 1). This percentage is below that of 1985 and 1986, but it is up from the early 1980s when Northwest exports averaged about 75% of the U.S. total. On a product weight basis, the volume of Northwest exports amounted to 606.8 million pounds (lb) or 275,243 metric tons (t), an increase of 2.5% from 1986.

The strong upward trend in exports began in 1985 after 5 years of **moderate gains in the quantity and annual declines (except in 1981)** in the value of exports (Fig. 1). Between 1979 and 1984, the nominal value of Northwest exports declined by a total of 16%, but the constant dollar or inflation adjusted value decreased by 39%. Since 1984, exports have increased 36% in quantity, 90% in nominal value, and 74% in constant dollar value.

Sales by U.S. fishing vessels to foreign processing vessels in the U.S. exclusive economic zone, known as joint ventures sales, are not currently included as U.S. fishery exports. If they had been included for 1987, Northwest exports would have been \$1.4 billion and would have accounted for

Table 1. --Comparison of Northwest exports of edible fishery products in millions of dollars excluding and including joint venture sales and percent of total U.S. exports of edible fishery products, 1981-87.

Year	Excluding joint ventures			Including joint ventures		
	Pacific Northwest	Total U.S.	% Total U.S.	Pacific Northwest	Total U.S.	% Total U.S.
1981	\$ 805	\$1,073	75.0	\$ 818	\$1,094	74.8
1982	739	999	74.0	775	1,035	74.8
1983	668	908	73.6	715	959	74.6
1984	648	842	76.9	724	921	78.6
1985	837	1,010	82.9	940	1,115	84.3
1986	1,034	1,290	80.2	1,187	1,445	82.1
1987	1,232	1,578	78.1	1,432	1,792	79.9

Sources: U.S. Dep. Commer., Bureau of the Census; database from Natl. Mar. Fish. Serv., Washington, D.C. 20235; Northwest and Alaska Fish. Cent., 7600 Sand Point Way N.E., BIN C15700, Seattle, WA 98115-0070.

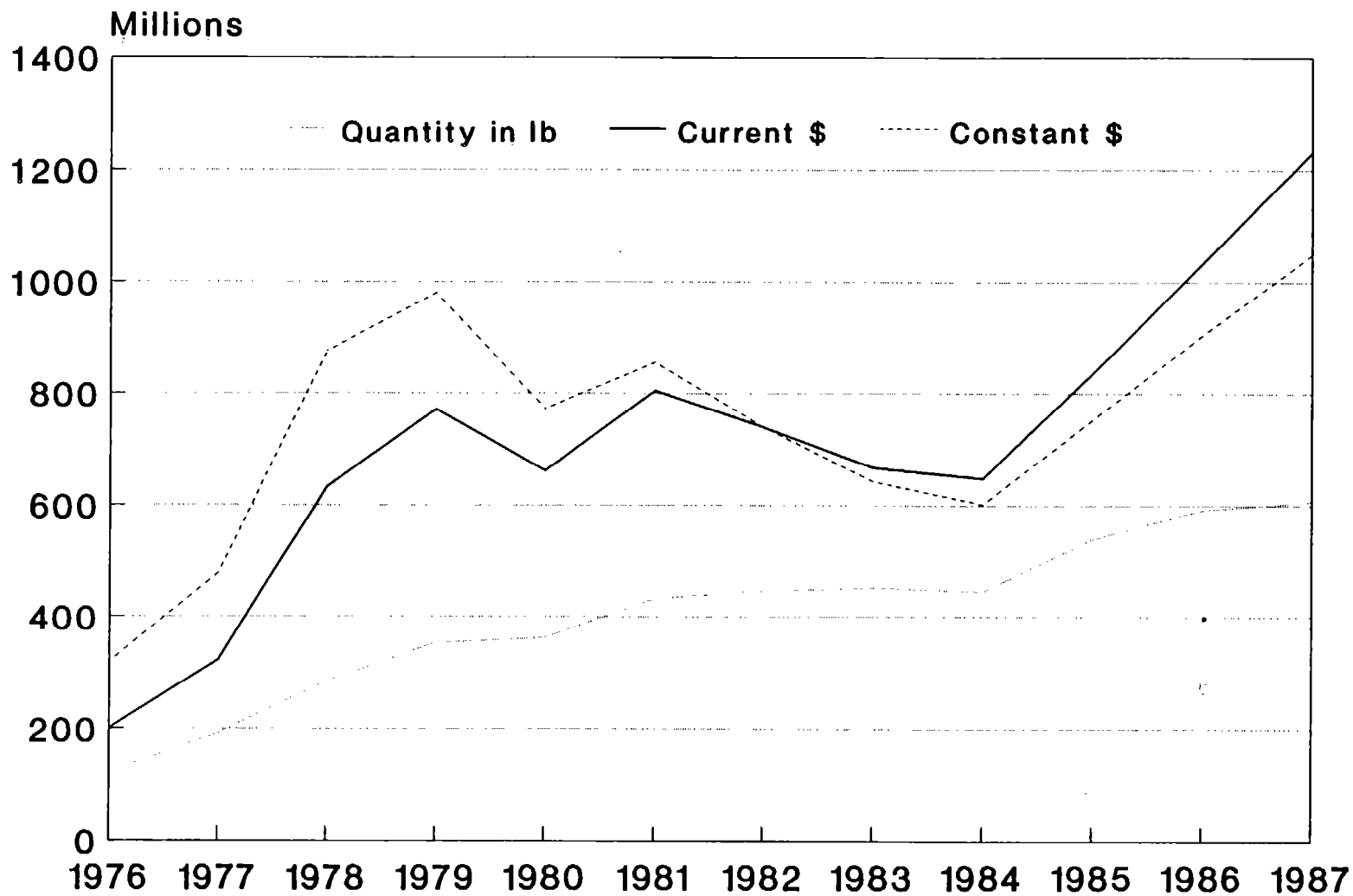


Figure 1.--Pacific Northwest exports of edible fishery products in quantity and value (current and constant dollars), 1976-87.

79.9% of total U.S. exports of edible fishery products rather than 78% (Fig. 2). Although joint venture sales have among the fastest growing type of U.S. fishery product sales to foreign nations, this source of export growth may have peaked in 1987 as wholly domestic fisheries have begun to replace joint venture fisheries.

Major Products

The quantity and value of most export categories, except for Pacific halibut (Hippoglossus stenolepis) and Pacific salmon (Oncorhynchus spp.), increased in 1987. Exports of whole or dressed salmon declined by 9% in quantity, but increased by 8% in value. Other products that increased were exports of sablefish (Anoplopoma fimbria), snow (Tanner) crab (Chionoecetes spp), . king crab (Lithodes and Paralithodes spp.), "other" whole or dressed fish, and "other" fish fillets. The major products and product groups for 1986-87 are listed in Table 2, while Table 3 summarizes Northwest fishery products or product groups for 1981-87. When all salmon products are summed for 1987, they accounted for \$728 million or 59% of Northwest fishery exports, followed by other fresh or frozen finfish (\$193 million or 15.7%), snow crab (\$114 million or 9.3%), Pacific herring (Clupea harengus pallasii) products (\$93 million or 7.5%), and king crab (\$59 million or 4.8%) (Fig. 3). The quantity of Northwest salmon exports declined by almost 15%, but the value increased by 2.9% in 1987, and accounted for 9.3% less of total value of Northwest exports in 1987 than in 1986. Lower exports of salmon products resulted from reduced Alaska salmon catches that declined in 1987 to 489 million lb from 590 million lb in 1986 and a record catch in 1985 of 674 million lb.. The quantity of whole or dressed salmon in 1987 declined 9.2% from 1986, but the value increased by 8.3% as higher average prices more than

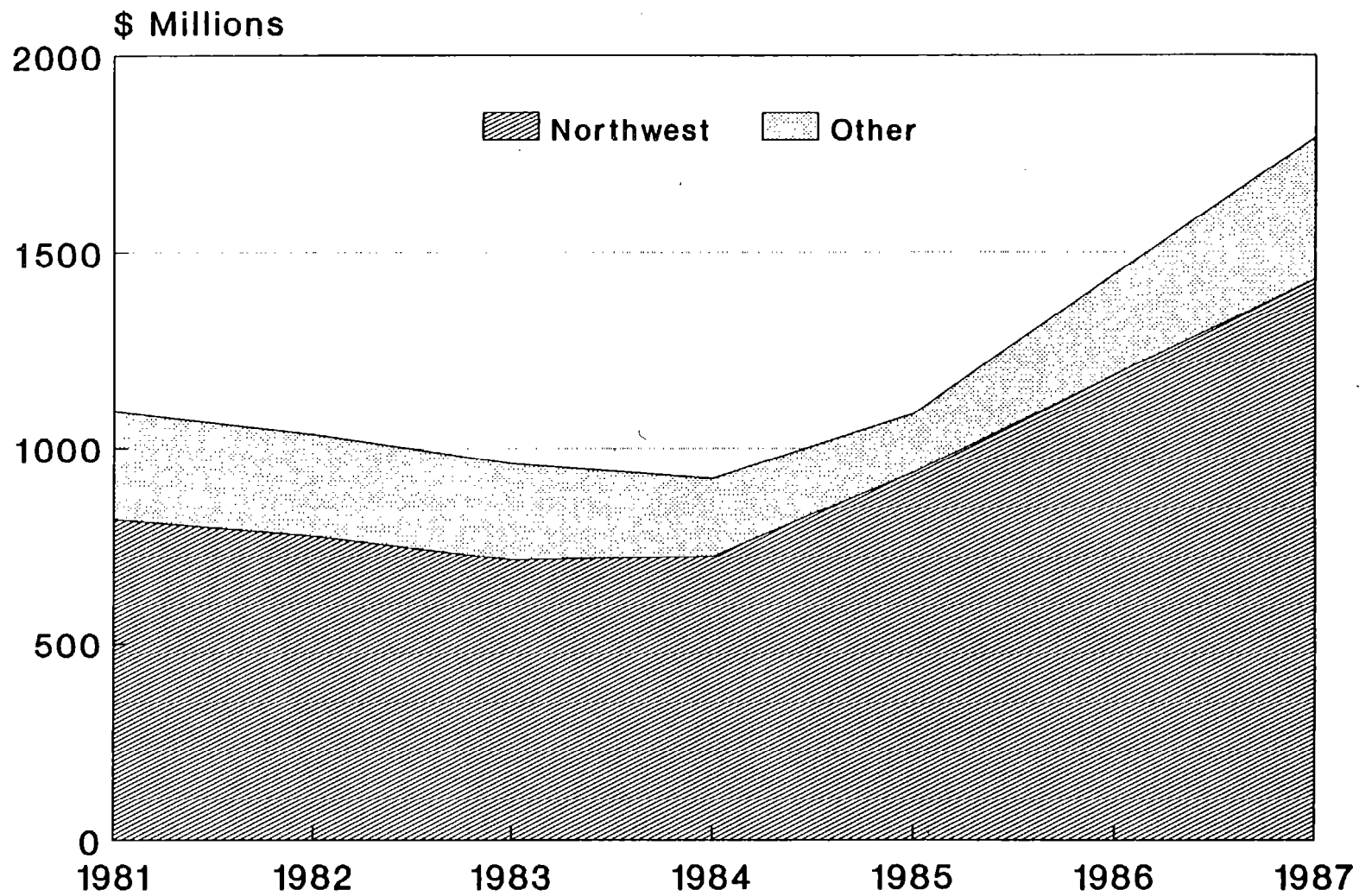


Figure 2.--Pacific Northwest and total U.S. exports of edible fishery products including joint venture sales, 1981-87.

Table 2. -Pacific Northwest exports of edible fishery products in quantity (millions of pounds) and value (millions of dollars), and percent change in quantity and value from 1986 to 1987.

Product	1986		1987		% Change	
	Quantity	Value	Quantity	Value	Quantity	Value
FRESH & FROZEN						
Whole/dressed						
Salmon						
Chum	43.9	\$ 55.3	37.9	\$ 54.4	-14	-2
Pink	49.6	42.0	34.1	45.5	-31	+7
Sockeye	143.1	350.9	135.9	362.7	-5	+3
Other	43.4	81.6	46.4	111.3	+7	+37
Subtotal	280.0	529.8	254.3	573.9	-9	+8
Herring	74.8	58.0	81.0	70.4	+8	+21
Sablefish	26.2	35.2	40.9	68.6	+57	+95
Other whole/dressed						
Halibut	10.5	17.2	6.6	12.9	-36	-25
Other	41.7	44.1	58.5	69.7	+40	+58
Subtotal	52.2	61.3	65.1	82.6	+25	+35
Fillets & steaks						
Herring	4.5	3.2	2.6	2.4	-42	-25
Salmon	2.2	4.3	1.6	3.3	-27	-23
Other fillets						
Cod	7.2	9.7	7.6	12.1	+6	+25
Halibut	1.7	2.8	1.1	2.0	-35	-29
Other	7.9	9.6	18.3	22.1	+132	+130
Subtotal	16.8	22.1	27.1	36.3	+61	+65
King crab	3.7	23.3	8.0	58.6	+116	+152
Snow crab, <u>opilio</u>	20.0	37.4	30.4	75.5	+52	+102
Snow crab, other	9.5	30.9	11.6	38.2	+22	+23
Shrimp	2.6	8.8	3.1	9.6	+19	+9
CANNED						
Salmon						
Pink	37.2	51.0	16.3	29.1	-56	-43
Sockeye	14.1	37.8	10.6	36.2	-25	-4
Other	6.2	10.0	6.7	14.7	+8	+47
Subtotal	57.5	98.8	33.6	80.0	-42	-19
ROE						
Herring	9.1	17.0	5.6	20.0	-38	+17
Salmon	19.2	72.0	16.6	70.3	-14	-2
Other	1.0	1.9	2.1	4.6	+110	+142
N.E.S.*	<u>12.9</u>	<u>29.7</u>	<u>23.2</u>	<u>37.5</u>	<u>+80</u>	<u>+26</u>
Total	592.2	\$1,033.7	606.8	\$1,231.8	+2	+19

*-Not elsewhere specified.

Note: Discrepancies in totals are due to rounding.

sources: U.S. Dep. Commr., Bureau of the Census; database from Natl. Mar. Fish. Serv., Natl. Fish. Stat. Prog., Washington, D.C. 20235; Northwest and Alaska Fish. Cent., 7600 Sand Point Way N.E., BIN C15700, Seattle, WA 98115-0070.

Table 3.--Pacific Northwest exports of edible fishery products or product groups by value (in million of dollars) and percent, 1981-87.

Year	Salmon	Herring	Other finfish*	King crab	Snow crab	other	Total
Value							
1981	\$572	\$ 57	\$ 26	\$52	\$ 53	\$45	\$ 805
1982	531	60	23	25	62	38	739
1983	510	67	21	7	32	28	668
1984	480	60	44	10	26	28	648
1985	597	104	64	9	36	27	837
1986	707	78	121	24	68	36	1,034
1987	728	93	193	59	114	46	1,232
Percent							
1981	71.0	7.1	3.2	6.5	6.6	5.6	100.0
1982	71.9	8.1	3.7	3.4	8.4	5.1	100.0
1983	76.4	10.0	3.1	1.1	4.8	4.6	100.0
1984	74.1	9.3	6.8	1.5	4.0	4.3	100.0
1985	71.3	12.4	7.7	1.1	4.3	3.2	100.0
1986	68.4	7.5	11.7	2.3	6.6	3.5	100.0
1987	59.1	7.5	15.7	4.8	9.3	3.6	100.0

*Other fresh or frozen finfish excluding and herring.

Note: Discrepancies in totals are due to rounding.

Sources: U.S. Dep. Commer., Bureau of the Census; database from Natl. Mar. Fish. Serv., Natl. Fish. Stat. Prog., Washington, D.C. 20235; Northwest and Alaska Fish. Cent., 7600 Sand Point Way N.E., BIN C15700, Seattle, WA 98115-0070.