

APPENDIX A

SHRIMP INDUSTRY DISTRIBUTION CHANNEL SURVEY QUESTIONNAIRE

I. GENERAL FIRM CHARACTERISTICS

(1) What is your firm's current primary activity? *Check one.*

PLEASE CHECK ONE	CURRENT PRIMARY ACTIVITY
<input type="checkbox"/>	DOCKSIDE BUYER/DEALER (FIRST HANDLER)
<input type="checkbox"/>	BROKER (IMPORTS/DOMESTIC). <i>A broker is an entity that does not take title to the product.</i>
<input type="checkbox"/>	WHOLESALER (IMPORTS/DOMESTIC). <i>A wholesaler is an entity that takes title to the product.</i>
<input type="checkbox"/>	PROCESSOR (BREADING/CANNING/DRYING/FREEZING/PEELING/OTHER)
<input type="checkbox"/>	JOBBER/DISTRIBUTOR/TRANSPORTER
<input type="checkbox"/>	RETAILER (FOOD-GROCERY STORES/FRESH/COOKED/BOILED/RESTAURANT)
<input type="checkbox"/>	OTHER. PLEASE SPECIFY:

(2) Based on value, what percent of your business is devoted to shrimp? _____ % (If 100%, go to Question 4)

(3) If your answer to Question 2 is less than 100%, please estimate the percentages, based on value, of the seafood products that your firm engages in? Items should sum to 100% when shrimp percentage is added.

Shrimp	_____	%
Oysters	_____	%
Crabs	_____	%
Crawfish	_____	%
Finfish	_____	%
Other (Specify: _____)	_____	%
TOTAL	100	%

(4) How many years has your firm been involved in shrimp/shrimp products? _____ years

(5) List the parishes where your firm's operations are located? _____

(6) Which of the following organizational structures characterizes your firm?

<input type="checkbox"/> Sole Proprietorship/Single Owner	<input type="checkbox"/> Partnership (Number of partners: _____)
<input type="checkbox"/> Corporation	<input type="checkbox"/> Cooperative (Number of Members: _____)

II. LEVEL OF MARKET COORDINATION

- (7) In addition to your firm's primary activity, as indicated in Question 1, is your firm involved in other activities in the shrimp industry? Yes No (If No, go to Question 9)
- (8) Which of the additional activities is your firm involved in? *Check all that apply.*

CHECK HERE	ADDITIONAL ACTIVITY
	SHRIMP HARVESTER
	DOCKSIDE BUYER/DEALER (FIRST HANDLER)
	BROKER (IMPORTS/DOMESTIC). <i>A broker is an entity that does not take title to the product.</i>
	WHOLESALER (IMPORTS/DOMESTIC). <i>A wholesaler is an entity that takes title to the product.</i>
	FUEL DEALER
	ICE PLANT
	PROCESSOR (BREEDING/CANNING/DRYING/FREEZING/PEELING/OTHER)
	JOBBER/DISTRIBUTOR/TRANSPORTER
	RETAILER (FOOD-GROCERY STORES/FRESH/COOKED/BOILED/RESTAURANT)
	OTHER. PLEASE SPECIFY:

- (9) Does your firm have any special business arrangements with firms in other shrimp industry activities? (*For example, if you operate a processing firm, does your firm have a contractual/verbal/implicit arrangement with a broker or a dockside buyer/dealer?*). If the answer is NO to all, go to Question 11.

In Louisiana: Yes No
 Out of State: Yes (Specify: _____) No
 Overseas: Yes (Specify: _____) No

- (10) Which of the following types of firms does your firm have special business arrangements with? Check all that apply. (*For example, if you operate a processing firm, does your firm have a contractual, verbal, or implicit arrangement with a broker or a dockside buyer/dealer?*)

CHECK HERE	TYPE OF FIRM
	SHRIMP HARVESTER
	DOCKSIDE BUYER/DEALER (FIRST HANDLER)
	BROKER (IMPORTS/DOMESTIC). <i>A broker is an entity that does not take title to the product.</i>
	WHOLESALER (IMPORTS/DOMESTIC). <i>A wholesaler is an entity that takes title to the product.</i>
	FUEL DEALER
	ICE PLANT
	PROCESSOR (BREEDING/CANNING/DRYING/FREEZING/PEELING/OTHER)
	JOBBER/DISTRIBUTOR/TRANSPORTER
	RETAILER (FOOD-GROCERY STORES/FRESH/COOKED/BOILED/RESTAURANT)
	OTHER. PLEASE SPECIFY:

III. INPUT SUPPLY CHARACTERISTICS

(11) What proportion of your shrimp purchases is from the following sources? *Please estimate percentages.*

SOURCE	PERCENTAGE
LOUISIANA	%
OTHER U.S. STATES	%
IMPORTED SOURCES	%
TOTAL	100 %

(12) If you purchase shrimp from other states, please specify the states and percentages purchased:

(13) If your firm purchases imported shrimp, please specify the country(ies) and percentages purchased:

(14) In what product form do you primarily purchase shrimp? *Check all that apply and estimate percentages.*

	CHECK HERE	PRODUCT TYPE	% OF TOTAL VOLUME
DOMESTIC (U.S.A.)	<input type="checkbox"/>	HEADS-ON	%
	<input type="checkbox"/>	HEADS-OFF	%
	<input type="checkbox"/>	PEELED	%
	<input type="checkbox"/>	PROCESSED (Specify: _____)	%
	<input type="checkbox"/>	INDIVIDUAL QUICK FROZEN	%
	<input type="checkbox"/>	OTHER (Specify: _____)	%
IMPORTED	<input type="checkbox"/>	HEADS-ON	%
	<input type="checkbox"/>	HEADS-OFF	%
	<input type="checkbox"/>	PEELED	%
	<input type="checkbox"/>	PROCESSED (Specify: _____)	%
	<input type="checkbox"/>	INDIVIDUAL QUICK FROZEN	%
	<input type="checkbox"/>	OTHER (Specify: _____)	%
		TOTAL	100 %

(15) Please estimate the average total volume and value of shrimp that you purchase.

Volume (pounds): _____ Value: \$ _____

- (16) What is your firm's preferred size count and condition for shrimp you purchase? *Please check all size counts and conditions (heads-on and/or heads off) that apply.*

CATEGORY	CHECK ALL THAT APPLY		
	SIZE COUNT	HEADS-ON	HEADS-OFF
LESS THAN 30			
30-35			
36-40			
41-50			
51-60			
61-70			
71-79			
80-100			
GREATER THAN 100			

- (17) Which of the following types of firms do you purchase your shrimp from? *Please estimate average percentages of shrimp purchased over the last three years.*

	TYPE OF FIRM	% VOLUME PURCHASED	% VALUE PURCHASED
DOMESTIC (U.S.A.)	HARVESTER	%	%
	DOCKSIDE BUYER/DEALER	%	%
	BROKER	%	%
	WHOLESALER	%	%
	PROCESSOR	%	%
	JOBBER/DISTRIBUTOR/TRANSPORTER	%	%
	RETAILER	%	%
	OTHER (Specify:)	%	%
IMPORTED	HARVESTER	%	%
	DOCKSIDE BUYER/DEALER	%	%
	BROKER	%	%
	WHOLESALER	%	%
	PROCESSOR	%	%
	JOBBER/DISTRIBUTOR/TRANSPORTER	%	%
	RETAILER	%	%
	OTHER (Specify:)	%	%
TOTAL		100 %	100 %

IV. PRODUCTION CHARACTERISTICS

(18) What is the value of your firm's total investment (value of all assets) ? \$ _____

(19) What proportion of this total investment is in the following items:

	Total = 100%
Physical Plant (Examples: Building, Dock Space, Ice Plant, etc.)	_____ %
Equipment (Examples: Peeling Machines, Generators, etc.)	_____ %
Transportation (Examples: Trucks, Boats, etc.)	_____ %
Cash	_____ %
Receivables (e.g., payment for advances made for fuel, ice, etc.)	_____ %
Other (Specify: _____)	_____ %

(20) Over the last three years, please estimate your firm's average total cost of operations? \$ _____

(21) From Question 20, please estimate the proportion of value that is attributed to the following:

COST ITEM	% OF TOTAL COST OF OPERATION
SHRIMP PURCHASED	%
LABOR	%
ELECTRICITY	%
TELEPHONE	%
FUEL	%
COLD STORAGE - ICE	%
LEASE PAYMENTS (e.g., LAND, BUILDING, etc.)	%
PACKAGING	%
TRANSPORTATION (Specify Mode: TRUCK, AIR, BOAT, _____)	%
OTHER (Specify: _____)	%
TOTAL	100 %

(22) Does your firm operate year-round? Yes No

If NO, what months do you normally operate in? _____

(23) On average, how many paid personnel does your firm employ? Please fill in the appropriate boxes. Provide answers to peak and off season employment if answer to Question 22 is NO.

TYPE OF EMPLOYMENT	ALL YEAR	PEAK SEASON	OFF SEASON
		Specify Months:	Specify Months:
MANAGEMENT/OWNER			
CLERICAL			
SALES			
TRANSPORTATION			
PRODUCTION			

V. SALES CHARACTERISTICS

(24) What is your firm's average **total annual sales** volume and value?

Volume (pounds): _____ Value: \$ _____

(25) If your firm sells products other than shrimp, what was your firm's average sales volume and value of **shrimp products only**? *Answer only if these are different from Question 24.*

Volume (pounds): _____ Value: \$ _____

(26) In what product form did your firm sell shrimp products? *Please estimate average percentages for all product forms that apply.*

PRODUCT FORM	% OF TOTAL
HEADS-ON	%
HEADS-OFF	%
PEELED (RAW)	%
PEELED (COOKED)	%
PROCESSED (BREADED)	%
PROCESSED (DRIED)	%
PROCESSED (PACKAGED)	%
PROCESSED (PREPARED FOOD MIX - PRODUCT)	%
PROCESSED (OTHER, Specify: _____)	%
COOKED - BOILED	%
OTHER (Specify: _____)	%
TOTAL	100 %

(27) What percentage of your annual sales is sold to the following types of buyers/firms?

TYPE OF BUYER/FIRM	PERCENT SOLD
LOUISIANA BUYERS / FIRMS <i>(If this is equal to 100%, answer Question 28 only)</i>	%
BUYERS/FIRMS FROM OTHER U.S. STATES	%
BUYERS/FIRMS FROM OTHER COUNTRIES	%
TOTAL	100 %

- (28) If all of your annual sales are sold to Louisiana buyers/firms, what type of buyers/firms do you sell your product(s) to?
Please estimate percentages annual sales sold to each type of firm.

TYPE OF FIRM	PERCENT SOLD
DOCKSIDE DEALER/BUYER	%
BROKER	%
WHOLESALER	%
PROCESSOR	%
JOBBER / DISTRIBUTOR / TRANSPORTER	%
RETAILER (e.g., Restaurants, Seafood Stores, Grocery Stores)	%
OTHER (Specify: _____)	%
TOTAL	100 %

- (29) If your firm sells shrimp product(s) to buyers/firms in other US states or other Countries, please estimate percent of annual sales sold to each type of firm.

TYPE OF FIRM	PERCENT SOLD
OTHER U.S. STATES (Specify States: _____)	
DOCKSIDE DEALER/BUYER	%
BROKER	%
WHOLESALER	%
PROCESSOR	%
JOBBER / DISTRIBUTOR / TRANSPORTER	%
RETAILER (Specify: _____)	%
RESTAURANT	%
OTHER (Specify: _____)	%
OTHER COUNTRIES (Specify Countries: _____)	
DOCKSIDE DEALER/BUYER	%
BROKER	%
WHOLESALER	%
PROCESSOR	%
JOBBER / DISTRIBUTOR / TRANSPORTER	%
RETAILER (Specify: _____)	%
RESTAURANT	%
OTHER (Specify: _____)	%
TOTAL	100 %

VI. COMMENTS

Have there been significant changes in your business operations in the last ten years?

_____ Yes _____ No

If there have been significant changes in your operations, please elaborate.

In your opinion, how do you characterize the business climate in your industry? *Please check one.*

_____ It has improved over the last ten years.

_____ It has deteriorated over the last ten years.

_____ No Change.

If there has been a change in the business climate, what factors do you think have contributed to this change? What changes need to happen, if any.

THANK YOU FOR YOUR TIME AND COOPERATION

APPENDIX B

PROPOSED THREE YEAR BUDGET FOR SURVEY OF SHRIMP INDUSTRY

Product / Service	Description of Services	Cost
Salaries and Benefits	(1) conduct personal interviews and mail surveys with dealers, processors, and retailers in the shrimp industry; (2) enter information from interviews into computer database; and, (3) perform analysis on data encoded.	\$ 150,000
Operating Expenses	Funds needed to defray cost of the following: (1) travel associated with conducting personal interviews; (2) postage; (3) office supplies; (4) auto supplies; and, (5) printing of surveys & research document.	\$ 23,000
Acquisitions	Purchase of computer, associated peripheral products, and software to be used in data encoding and analysis.	\$ 6,000
Estimated Project Costs		\$ 179,000

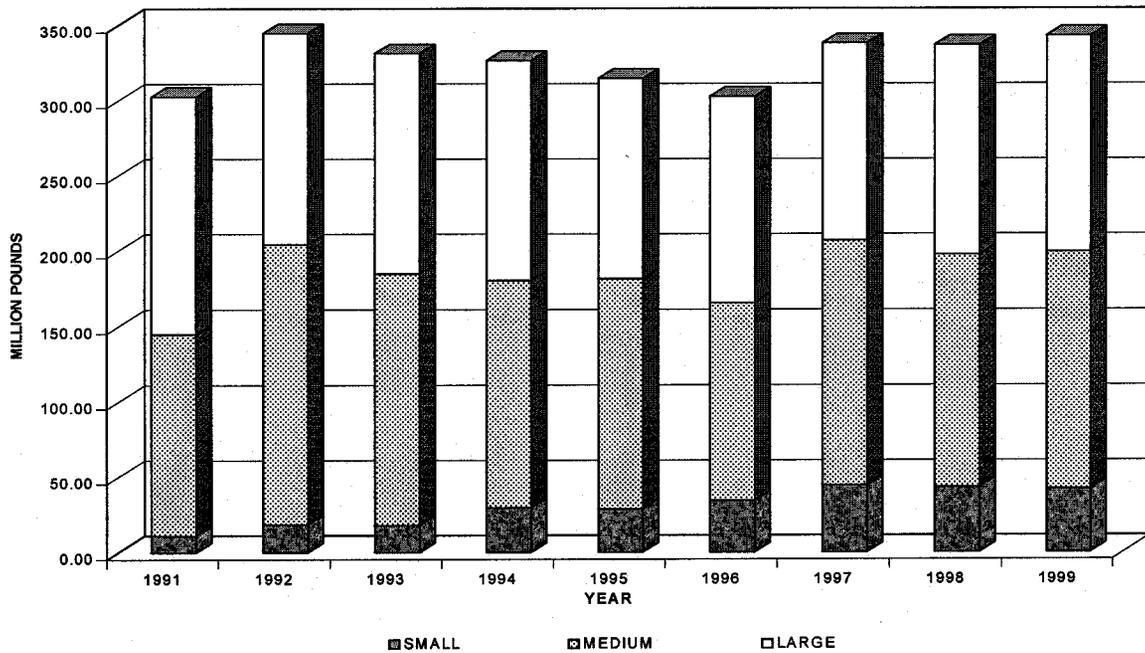
APPENDIX C

ANNUAL TRENDS IN U.S. IMPORTS OF SHRIMP PRODUCTS (1991-1999)

As noted in Section 3.2 of this report, the volume of shrimp imported into the United States has steadily risen from 1975 through 1998. Figure 12 shows that the increase in shrimp imports over this 23 year period has increased at an average annual rate of 6%.

The purpose of this appendix is to provide a more detailed look at the composition and value of imports that enters the U.S. from foreign shrimp sources. This appendix focuses on the 1991-1999 time period for the purpose of consistency in the reporting of imports by product type²⁷.

Appendix Figure 1: Volume of Imported, Shell-on Shrimp, by Size



Appendix Figure 1 shows that from 1991 to 1999, the volume of small²⁸ and medium shell-on shrimp have increased considerably in relation to large shrimp. From 10.94 million pounds in 1991, the volume of small has risen to 41.94 million pounds in 1999. This represented over 280 % increase

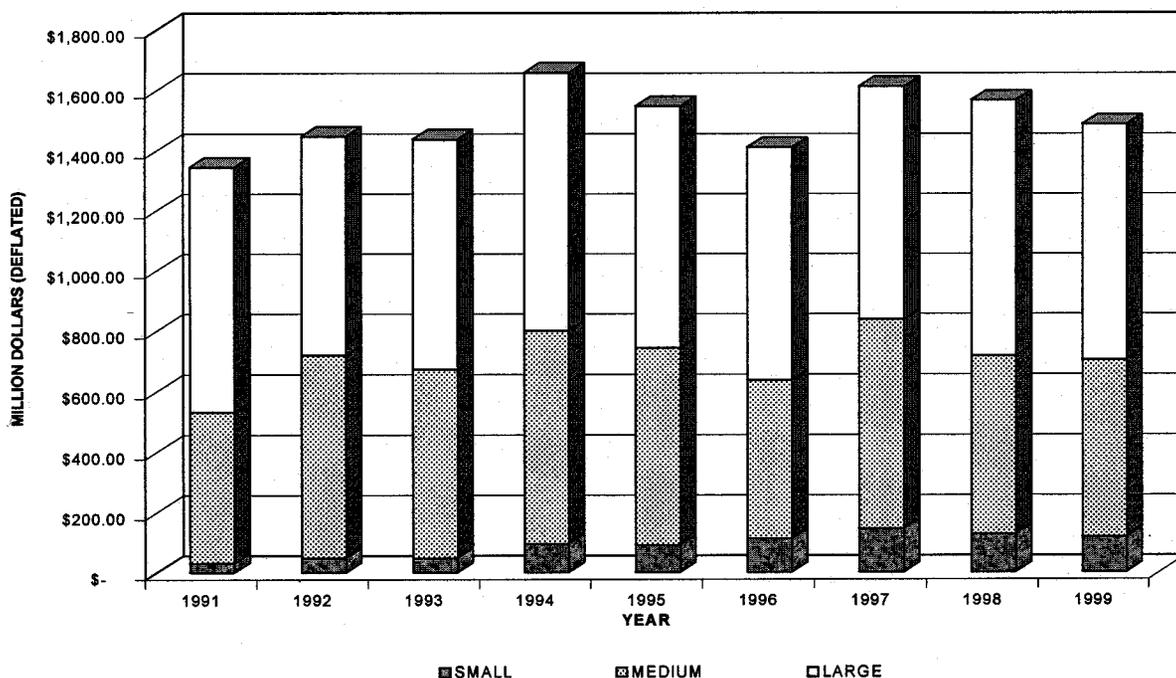
²⁷ The data used in this analysis was taken from the National Marine Fisheries Service (NMFS). Prior to 1991, NMFS reported shell-on shrimp imports as one whole category. In 1991 and for succeeding years, shell-on imports have been reported by size category. It is for the purpose of consistency that imports by product type presented in this appendix start with the year 1991.

²⁸ Small shrimp refer to greater than 70 size count. Medium shrimp represent 31 to 70 size count. Large shrimp characterize less than 30 size count.

in small shell-on shrimp imports over the nine year period. Medium shrimp, on the other hand, has exhibited an increase in imports of roughly 17% over the time period under study. This represents a rise from 134.11 million pounds in 1991 to approximately 157.02 million in 1999.

Despite its bigger volume, large shrimp imports into the United States have decreased from 1991 to 1999. From a 1991 high volume of 157.39 million pounds, imports of this size of shrimp decreased to 143.87 million by 1999.

Appendix Figure 2: Deflated²⁹ Value of Imported, Shell-on Shrimp



As evidenced by Appendix Figure 2, the deflated value of shell-on shrimp imported into the U.S. has experienced crests and troughs during the 1991 to 1999 period. From a 1991 import value of \$1.35 billion, the value of shell-on imported shrimp has risen to \$1.66 billion in 1994, the highest level in the decade. Since that year, the value of shell-on shrimp imports has declined, risen, and dropped to a 1999 level of \$1.49 billion.

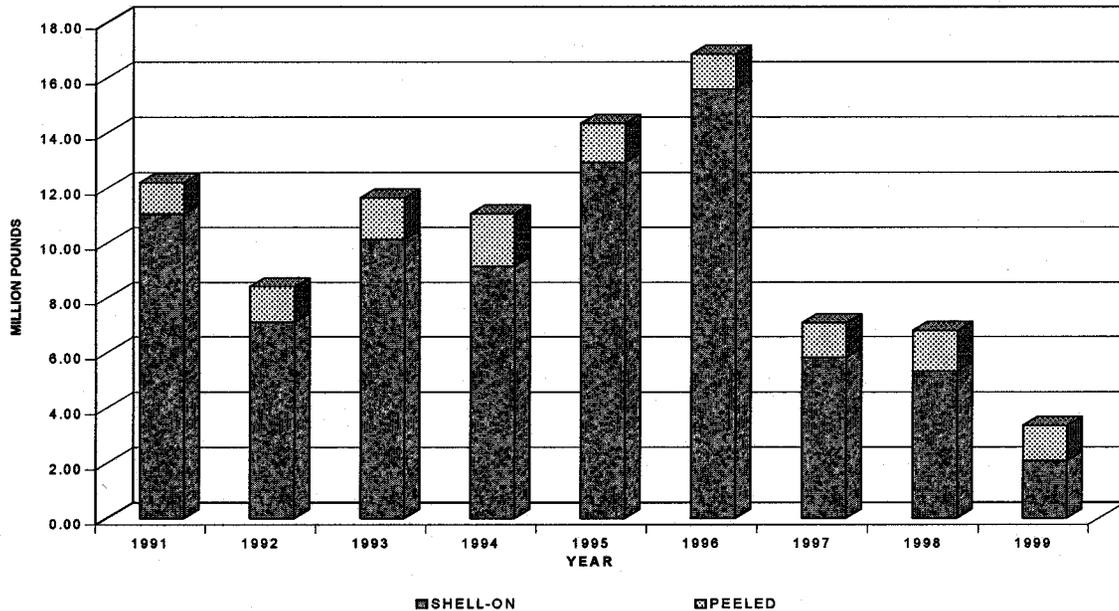
Large and medium shell-on shrimp have constituted the majority of the shell-on shrimp imported into the U.S. over this period of time. Large shell-on shrimp has provided 53% of the average annual value of imports from 1991 to 1999. Medium shell-on shrimp, on the other hand, has represented 41% of average annual imports over the same period of time.

²⁹

Value of imports are deflated using the CPI with a base year of 1997.

It is interesting to note that the import value of small shell-on shrimp has increased during the 1990s. In 1991, the value of imported small shell-on shrimp was estimated at \$31 million. This represented 2.3% of the value of imported shell-on shrimp. By 1999, the value of small shell-on shrimp had risen to \$116.6 million, which represents 7.8% of the total value imported in 1999.

Appendix Figure 3: Volume of Imported Shrimp in Fresh/Salted/Dried/Brined Form



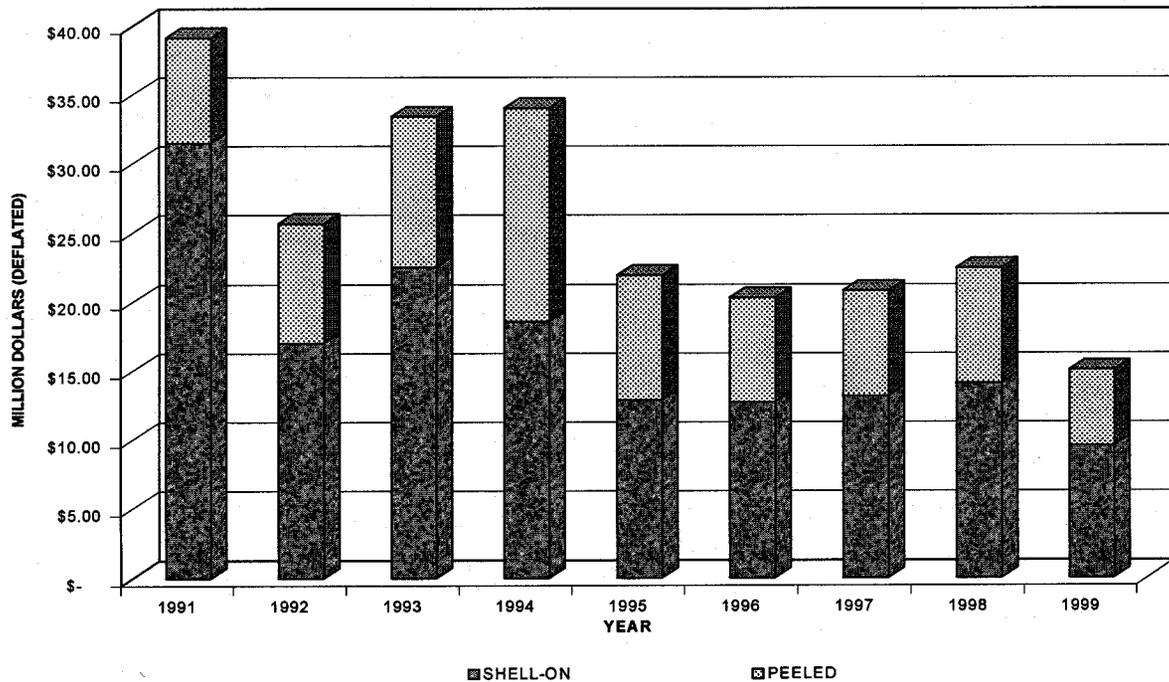
The volume of shrimp imported in FSDB³⁰ form has fluctuated considerably over the 1991-1999 time period. A cursory inspection of Appendix Figure 3 shows substantial fluctuations in import volumes over the time period under study. A closer look reveals that import volumes of peeled FSDB shrimp have remained stable during this period. Volumes of this variety have hovered under 2 million pounds over the nine-year period.

The fluctuations in imported FSDB shrimp were caused by changes in the volume of shell-on FSDB imported shrimp. In 1991, the volume of shell-on FSDB shrimp imported to the United States was recorded at 11.05 million pounds. Over time, this volume declined and risen to a 1996 peak volume of 15.6 million pounds. Since 1996, the imported volume of shell-on FSDB shrimp decreased to a 1999 low of 2.07 million pounds.

In terms of value, the deflated values of FSDB shrimp imported into the United States have declined over the 1991-1999 time period. From a decade high value of \$39.2 million, the value of imported FSDB shrimp has steadily decreased. By 1999, the total value of imported shrimp in this product form has been cut to \$15.1 million. This represented a 160% decrease in deflated import value. Appendix Figure 4 provides an illustration of deflated values of imported FSDB shrimp.

³⁰ FSDB refers to shrimp imported in the following forms: fresh, salted, dried, or brined.

Appendix Figure 4: Deflated Value of Imported Shrimp in Fresh/Salted/Dried/Brined Form



Appendix Figure 5 illustrates the growth in U.S. imports of shrimp in breaded, canned, and other preparation³¹ forms. The volumes of imported breaded shrimp has hovered at under 2 million pounds from 1991 to 1999. Imported canned shrimp, on the other hand, has exhibited a decline from 9.4 million pounds in 1991 to under 3 million pounds in 1999. Significant increases have been seen in the volume of imported shrimp in other preparations from 1991 to 1999. From a little over 17 million pounds imported in 1991, the volume has increased close to 10 times by the end of 1999.

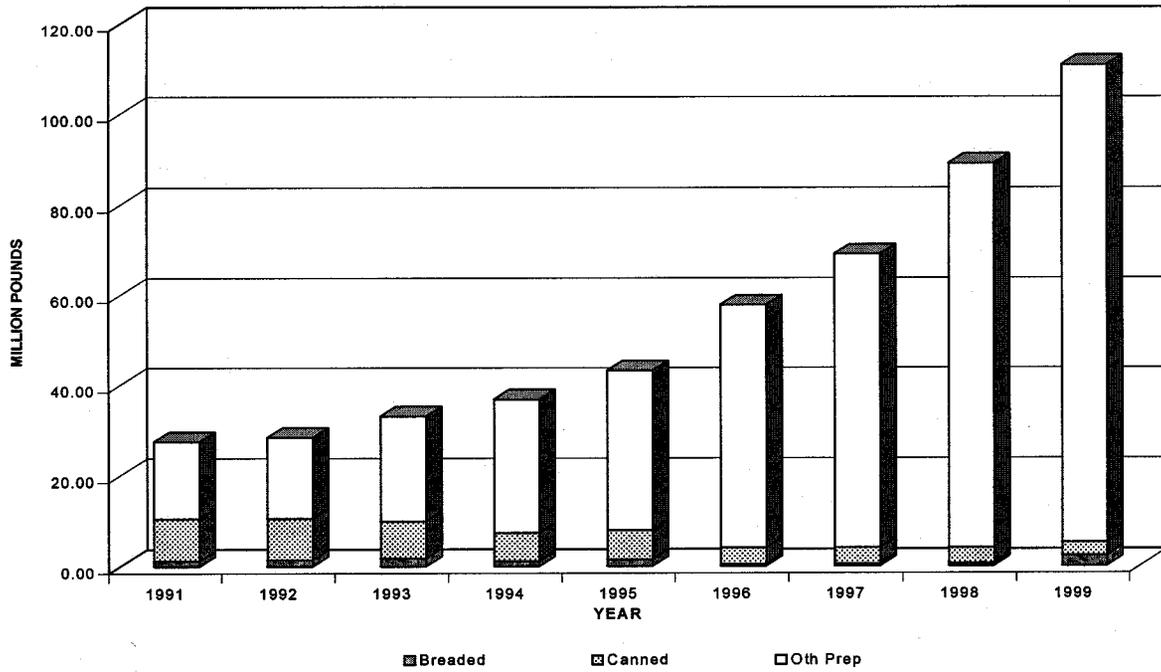
In terms of value, Appendix Figure 6 shows impressive increases in the deflated value of imported shrimp in other preparation forms. In 1991, the value of imported shrimp in other preparation forms was estimated at \$98 million. Increased imports of this type of shrimp product has resulted in a 382% rise in value to \$475.5 million in 1999.

Values of imported breaded shrimp have risen over the nine year period. It's value has ranged from \$4.2 million in 1991 to \$7 million in 1999. Canned imported shrimp, on the other hand, has exhibited declining values. From a high value of \$24 million in 1991, its value has dropped to \$7.4 million by 1999.

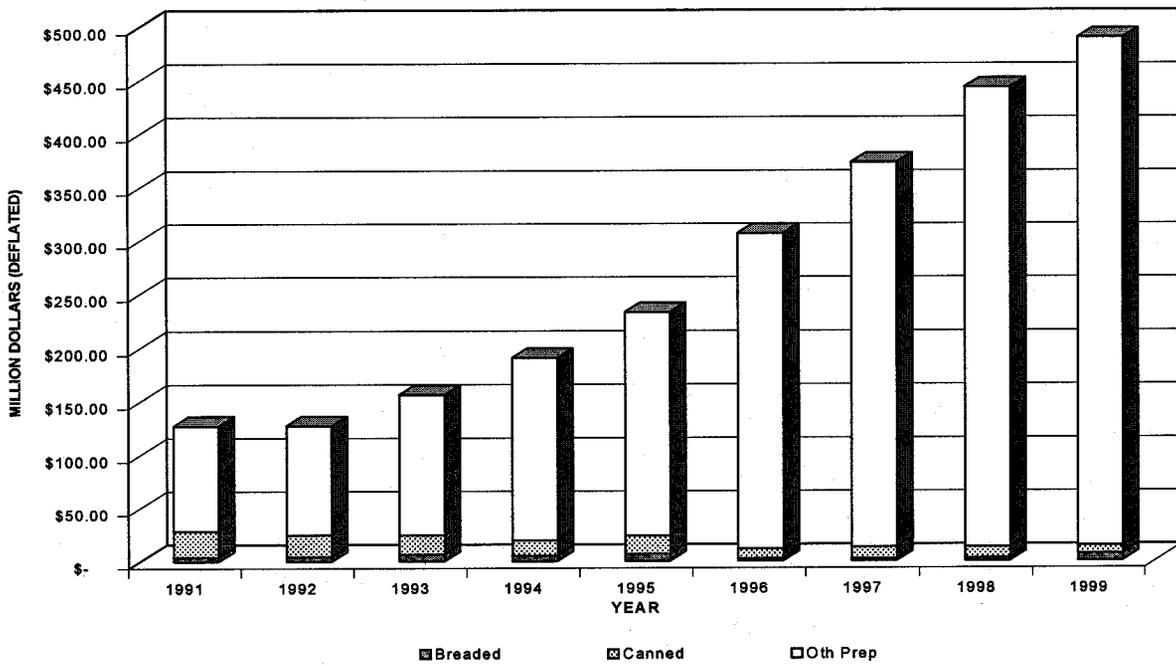
31

Other preparation forms represent shrimp that is prepared in cooked, boiled, packaged form. It also represents shrimp that is prepared in the form of meals for human consumption.

Appendix Figure 5: Volume of Imported Shrimp in Breaded, Canned, and Other Preparations Form



Appendix Figure 6: Deflated Value of Imported Shrimp in Breaded, Canned, and Other Preparations Forms



APPENDIX D

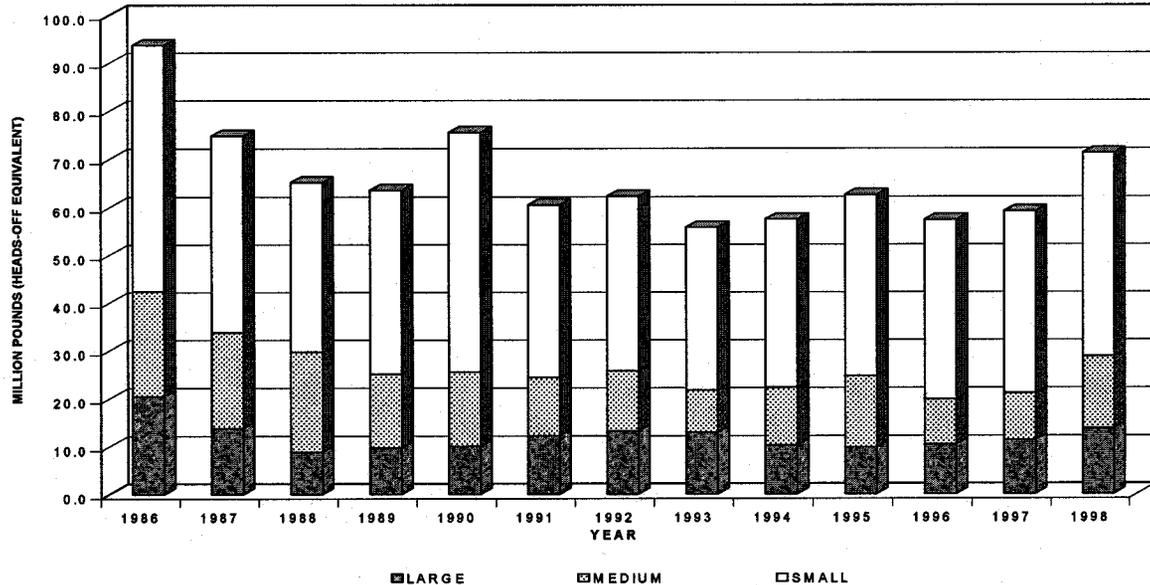
ANNUAL TRENDS IN VOLUME AND VALUE OF SHRIMP LANDED BY SIZE AND CONDITION

In this report, information on shrimp purchased by dealers/handlers has focused on the volume and value of shrimp based upon condition³². The purpose of this appendix is to provide additional information on the volume of shrimp purchased by dealers/handlers. In addition to the condition of shrimp purchased, this appendix illustrates yearly trends in the volume and value of shrimp purchased based on size³³.

Appendix Figure 7 shows the volume of shrimp in heads-off equivalent weight landed at Louisiana docks from 1986 to 1998. The volume of shrimp landed has declined from 93.7 million pounds in 1986 to around 71.2 million pounds in 1998.

It is evident that small shrimp has accounted for a considerable portion of the annual landings over the thirteen-year period. From 1986 to 1998, small sized shrimp has made up close to 60 percent of the average annual landings of shrimp at Louisiana docks.

Appendix Figure 7: Volume of Shrimp Landed at Louisiana Docks by Size
(Volume based on Heads-off Condition)

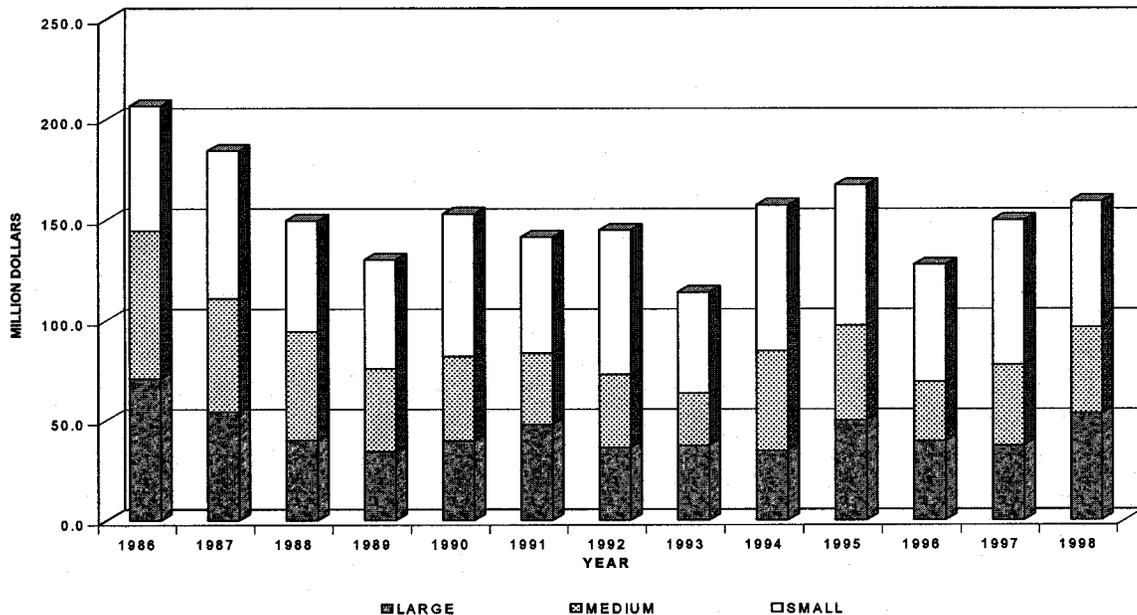


³² Heads-on and heads-off.

³³ Small shrimp represent size counts greater than 70 count. Medium shrimp characterize size counts between 31 to 70 count. Large shrimp symbolize size counts less than 30 count.

Shrimp in all three size categories equally contributed to the \$206 million value³⁴ landed in Louisiana docks in 1986. Over the next twelve years, both the value of shrimp landed and the contributions of the various size categories has declined. In 1998, the non-deflated value of shrimp landed at Louisiana docks was valued at \$159 million. In terms of percentage shares of value landed, small shrimp represented close to 40 percent of value landed in 1998 while large and medium size shrimp accounted for 33 percent and 27 percent of value landed, respectively. These observations were detailed in Appendix Figure 8.

**Appendix Figure 8: Value of Shrimp Landed at Louisiana Docks by Size
(Non-Deflated Value based on Heads-Off Condition)**



Dividing the value of landings by its corresponding volume level, we are able to derive trends for average annual prices per pound of shrimp by size category. These price trends are illustrated in Appendix Figures 9 through 10.

Appendix Figure 9 shows the average annual prices, both in actual and deflated terms³⁵, for large shrimp³⁶. A cursory inspection of the graph indicates relatively stable price changes for heads-on and heads-off large shrimp. Closer scrutiny reveals that the average actual price per pound of large heads-on shrimp has increased over the thirteen year period at an average annual rate of 3.2

³⁴ In actual (non-deflated) terms.

³⁵ Prices per pound measured in actual terms refer to prices that are not adjusted for inflation. Deflated prices represent prices adjusted for inflation using the Consumer Price Index for all urban consumers. The base year for the index was 1986.

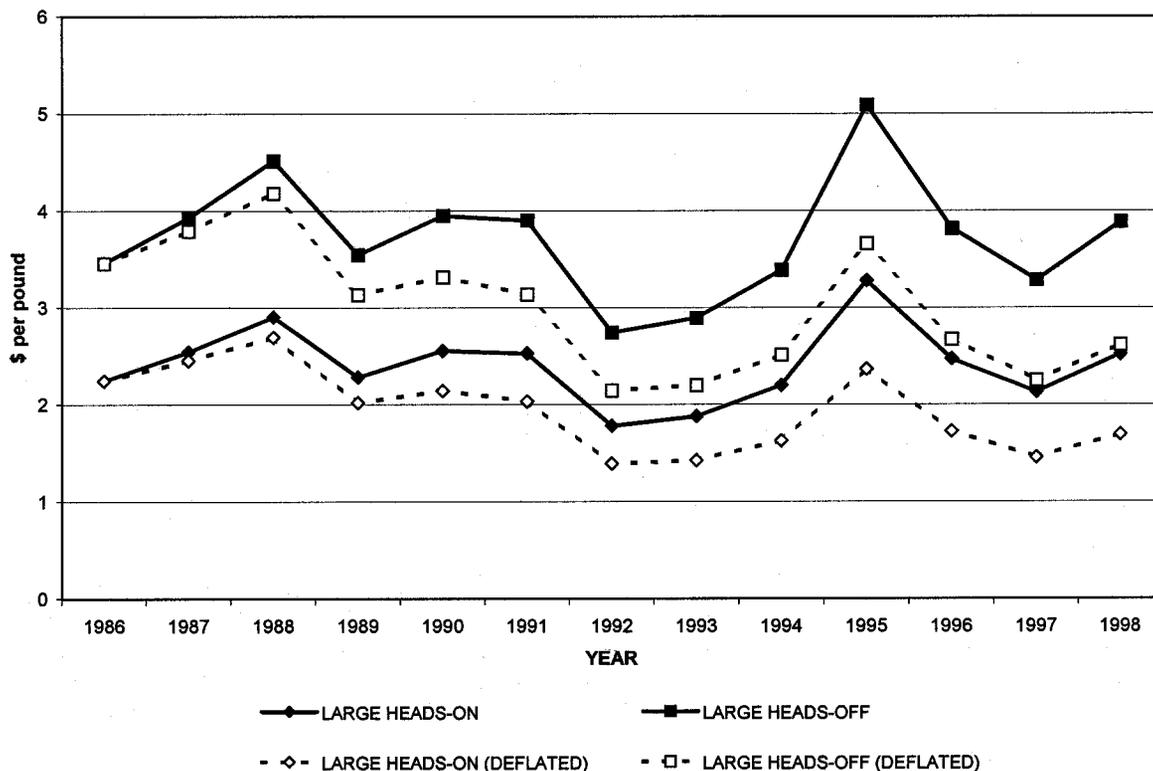
³⁶ Heads-on and Heads-off equivalent.

percent. The price has fluctuated considerably from \$2.24 per pound in 1986 to a high value of \$3.28 per pound in 1995 and settling at a 1998 price per pound of \$2.51.

The average price per pound of large, heads-off shrimp have exhibited similar fluctuations and rates of change. In actual terms, from a 1986 price of \$3.46 per pound to a 1998 price of \$3.88 per pound, the rate of change in the price of large, heads-off shrimp has risen at an annual average rate of 3.3 percent³⁷.

Appendix Figure 9: Actual and Deflated Prices per Pound of Large Shrimp (Heads-on and Heads-off Conditions)

In deflated terms, the average prices per pound of large, heads-on and heads-off shrimp



have declined from 1986 to 1998. In the case of large, heads-on shrimp, the average price has decreased from \$2.24 per pound in 1986 to \$1.69 per pound in 1998. This represented an average annual decrease of 0.1 percent.

As for large, heads-off shrimp, the average price deteriorated from \$3.46 per pound in

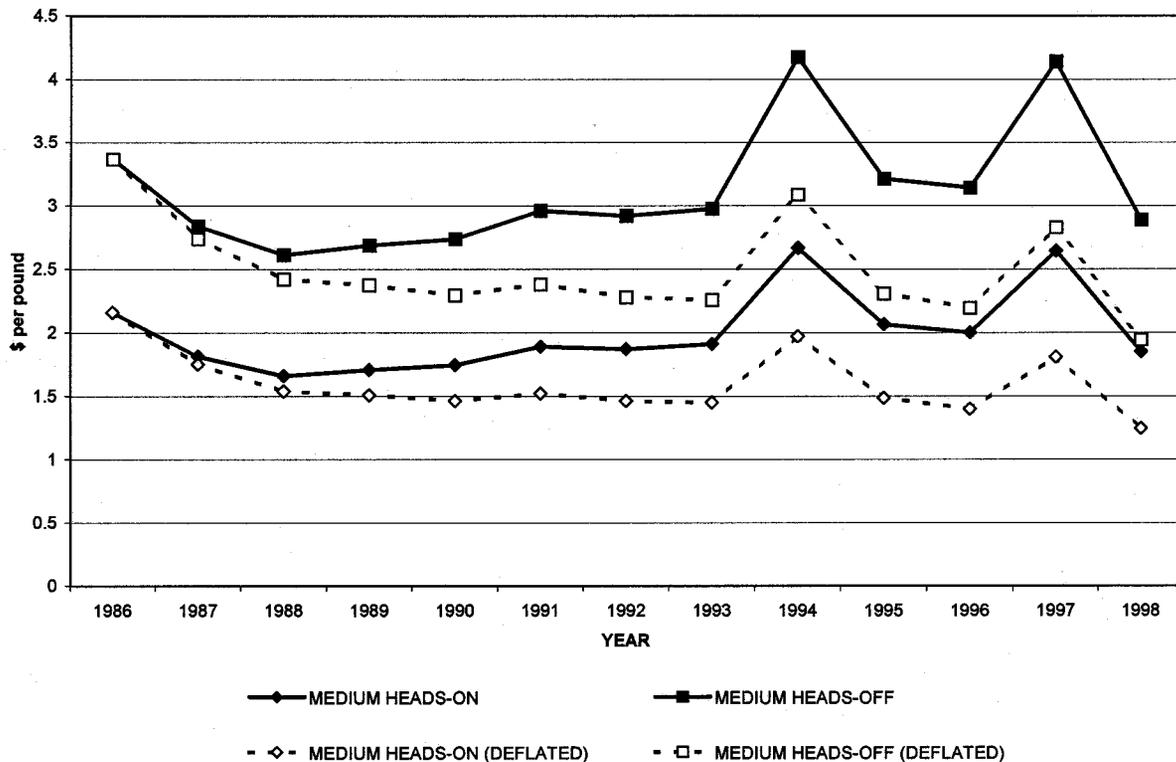
³⁷

Average annual rate of change is derived by taking the year-to-year percentage change in value and calculating for the average of all the annual percentage changes.

1986 to \$2.61 per pound in 1998. This signified a 0.02 percent decline in prices per year.

Appendix Figure 10: Actual and Deflated Prices per Pound of Medium Shrimp
(Heads-on and Heads-off Conditions)

Appendix Figure 10 provides an illustration of the thirteen year trend in the average prices



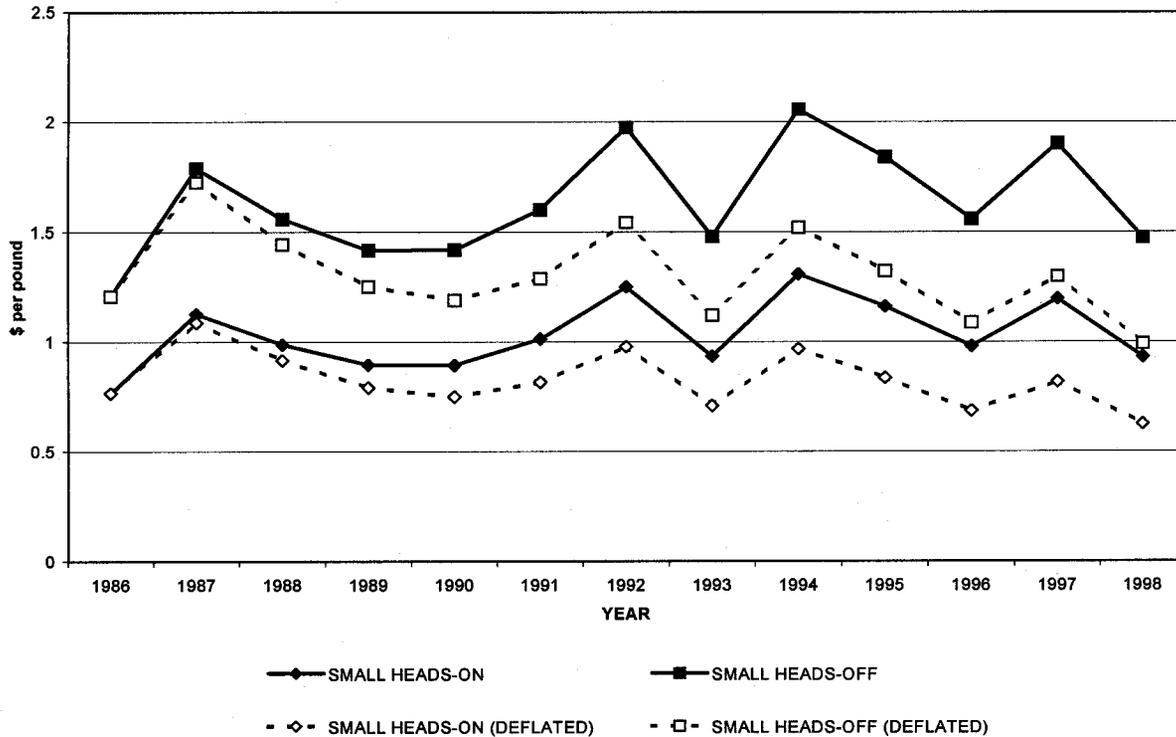
per pound of medium, heads-on and heads-off shrimp landed at Louisiana docks. A visual inspection of the graph shows that average prices declined throughout the last four years of the 1980s. Price changes in the 1990s have been characterized by broad swings between 1993 and 1998.

In actual terms, the average prices of medium, heads-on and heads-off shrimp have descended at an average annual rate of 0.5 percent for both conditions of medium shrimp. Average prices for heads-on shrimp have declined from \$2.16 per pound in 1986 to \$1.85 per pound in 1998. On the other hand, the average prices for heads-off shrimp have decreased from \$3.37 per pound in 1986 to \$2.89 per pound in 1998.

Taking inflation into consideration, the rate of decrease in average deflated prices per pound of medium, heads-on and heads-off shrimp is more pronounced. The average deflated price of heads-on shrimp has decreased from \$2.16 per pound in 1986 to \$1.24 per pound in 1998. This represents a 2.8 percent average annual decline in deflated prices. Heads-off shrimp has experienced a decrease in deflated prices from \$3.37 per pound in 1986 to \$1.94 per pound in 1998. This symbolizes a 2.7 percent annual decrease in deflated prices.

**Appendix Figure 11: Actual and Deflated Prices per Pound of Small Shrimp
(Heads-on and Heads-off Conditions)**

Appendix Figure 11 shows the annual trend in actual and deflated prices per pound of small, heads-on and heads-off shrimp in Louisiana. Small shrimp, both in heads-on and heads-off conditions, has exhibited the largest gains in actual and deflated prices over the thirteen years



illustrated in the graph.

Both conditions of small shrimp have reflected a 4.2 percent average annual increase in actual prices. In 1986, heads-on and heads-off shrimp were valued at \$0.76 and \$1.21 per pound, respectively. By 1998, these average actual prices have increased to \$0.93 per pound for heads-on shrimp and \$1.47 per pound for heads-off shrimp.

In deflated terms, the value of small, heads-on and heads-off shrimp have declined from 1986 to 1998. In 1986, heads-on shrimp were valued at \$0.76 per pound in deflated terms while heads-off shrimp were priced at \$1.21 per pound. By 1998, the average deflated prices for shrimp in these two conditions were valued at \$0.63 per pound for heads-on shrimp and \$0.99 per pound for heads-off shrimp. Despite these decreases, the average annual rate of change in the deflated prices per pound of small shrimp have increased by 0.8 percent per year for both conditions of small shrimp.

APPENDIX E

SENATE CONCURRENT RESOLUTION NO. 45

ENROLLED

Regular Session, 1999

SENATE CONCURRENT RESOLUTION NO. 45

BY SENATOR ROBICHAUX

A CONCURRENT RESOLUTION

To request additional funding for a fisheries data collection program and a detailed, historical study on price trends in the shrimping industry.

WHEREAS, the Select Council on Shrimp Management (hereafter "Council") was created, through Senate Concurrent Resolution Number 11 of the 1997 Regular Session of the Louisiana State Legislature, to study the current and future management of the shrimp industry and to make recommendations for the management of the industry's future; and

WHEREAS, the Council's findings state that the commercial shrimping occupation is an important social, cultural, and economic activity in Louisiana; and

WHEREAS, it was further found that the Louisiana commercial shrimp fishery has shown signs of overcapitalization as evidenced by decline in the number of resident commercial shrimp trawl gear licenses and vessels using such gear; and

WHEREAS, the number of smaller resident commercial fishing vessels has decreased relative to larger vessels; and

WHEREAS, it was further found that dockside prices paid to shrimp

harvesters have failed to keep pace with inflation; and

WHEREAS, it was further found that shrimp imports have increased three-fold in twenty-five years and an increasing share of imports are arriving in the United States pre-processed; and

WHEREAS, the Council recommended that fisheries data collection efforts were needed to be enhanced and expanded for appropriate fishery resource management; and

WHEREAS, through Executive Order MJF 98-61, the Governor of the State of Louisiana, M.J. Foster, Jr., established the Shrimp Industry Panel II (hereafter "Panel") to evaluate recommendations set forth in the report of the Council and to prepare recommended legislative initiatives based on said report for the 1999 Regular Session of the Louisiana Legislature; and

WHEREAS, the Panel has evaluated the Council's report and submitted its final report with several recommendations to the Governor, the Secretary of Wildlife and Fisheries, and the Senate and House Natural Resources Committees; and

WHEREAS, one of the recommendations, which was unanimously adopted by the Panel, was to expand and enhance fisheries data collection efforts and to conduct a detailed study of price trends in the shrimping industry.

THEREFORE, BE IT RESOLVED that the Legislature of Louisiana is urged to provide additional funding to expand and enhance fisheries data collection programs including biological, social, and economic data.

BE IT FURTHER RESOLVED that the Legislature of Louisiana urges and requests the Department of Wildlife and Fisheries to conduct a detailed, historical study on price trends in the shrimping industry, including prices paid to harvesters at dockside and each link along the marketing chain until the product reaches the consumer.

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ENROLLED

BE IT FURTHER RESOLVED that a copy of the results of the price trend study be transmitted to the Senate and House Natural Resources Committees prior to the beginning of the 2000 Regular Session.

PRESIDENT OF THE SENATE

SPEAKER OF THE HOUSE OF REPRESENTATIVES

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