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Equador melhora ainda mais a posição como fonte de camarão dos EUA em meio a dificuldades de COVID na Ásia

Por Jason Huffman e María Feijóo

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📷 Camarão equatoriano. Foto: Expalsa

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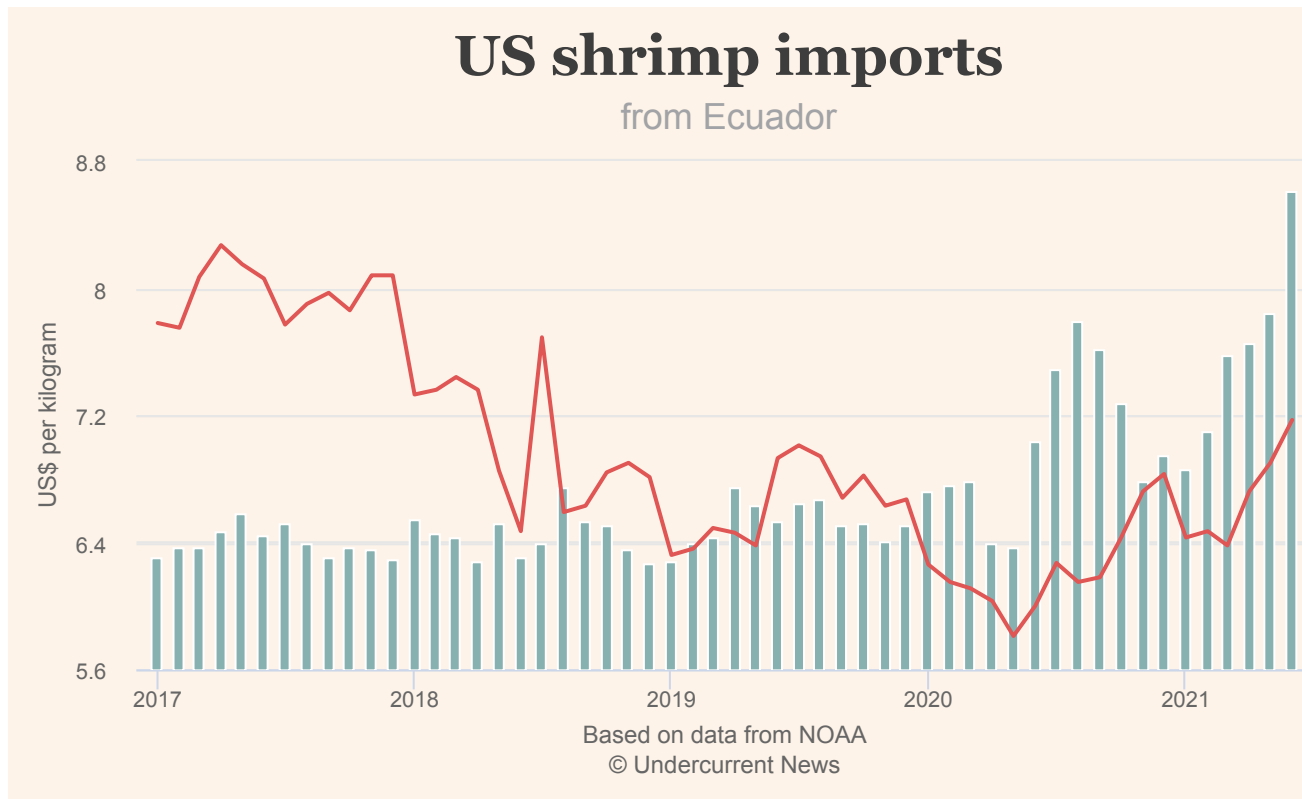
A tríade de países que servem como as principais fontes de camarão dos Estados Unidos foi abalada e talvez permanentemente desta vez.

Embora a Índia tenha continuado a ser a principal fonte de camarão dos Estados Unidos mais uma vez em junho de 2021, o Equador passou para o segundo lugar e agora está mordendo os calcanhares da Índia, descobriu o *Undercurrent News* ao analisar a última atualização da Administração Oceânica e Atmosférica Nacional (NOAA) de seus dados de comércio de frutos do mar.

A nação sul-americana enviou aos EUA 22.550 t de camarão no valor de \$ 161,7 milhões em junho, mais do que a Indonésia - o tradicional vice-campeão para a Índia.

Undercurrent relatou anteriormente como o Equador teve um grande mês de exportação de camarão em junho. O país, como um todo, exportou 70.000 t de camarão no valor de US \$ 415,0 milhões durante o período, um aumento de 25% em volume e 42% em valor ano a ano.

A União Europeia também foi uma grande beneficiária do aumento repentino do camarão no Equador. Suas importações aumentaram 44% para 16.200 t, no valor de US \$ 98 milhões, alta de 58% no comparativo anual.



O preço médio pago nos EUA pelo camarão equatoriano em junho de 2021 foi de \$ 7,17 por quilo, um aumento surpreendente de 19% em relação aos \$ 6,01 / kg pagos em junho de 2020. O Equador é tradicionalmente conhecido como uma das fontes mais baratas de vannamei para os EUA, mas seus preços têm subido.

O Equador **flertou várias vezes** em se tornar a segunda maior fonte de camarão dos EUA, incluindo em abril de 2021 e também em agosto de 2020. Mas uma revisão dos dados mais recentes da NOAA mostra que o Equador pode estar perto de consolidar o papel, já que foram os EUA a segunda maior fonte de camarão durante os primeiros seis meses de 2021, enviando 90.289 t no valor de US \$ 609,5 milhões - um aumento de 86% em volume e 107% em valor em relação aos primeiros seis meses de 2020.

Além do aumento geral na produção e nas exportações, os exportadores de camarão do Equador vêm ganhando participação no mercado dos EUA desde pelo menos julho de 2020, quando a China suspendeu as licenças de exportação de várias grandes empresas equatorianas de camarão por causa de preocupações com COVID-19, levando-os a se acomodar a seus segundo maior mercado de exportação.

Top 20 US shrimp import sources by volume, June 2021

Country	June 2021 Volume (metric tons)	June 2020 Volume (metric tons)	% change	June 2021 value	June 2020 value	% change	June 2021 \$/kilo	June 2020 \$/kilo	ch
INDIA	25,509	11,821	116%	\$210,817,602	\$102,908,079	105%	\$8.26	\$8.71	.
ECUADOR	22,550	10,750	110%	\$161,651,515	\$64,592,856	150%	\$7.17	\$6.01	:
INDONESIA	13,602	14,255	-5%	\$118,512,468	\$118,276,619	0%	\$8.71	\$8.30	.
VIETNAM	7,576	4,897	55%	\$79,761,282	\$52,316,049	52%	\$10.53	\$10.68	.
THAILAND	2,565	3,486	-26%	\$28,996,549	\$38,355,328	-24%	\$11.31	\$11.00	.
ARGENTINA	1,290	1,093	18%	\$14,276,952	\$12,582,124	13%	\$11.07	\$11.51	.
CHINA	607	1,079	-44%	\$3,376,943	\$5,619,855	-40%	\$5.56	\$5.21	.
PERU	575	987	-42%	\$4,847,734	\$6,475,135	-25%	\$8.44	\$6.56	:
SAUDI ARABIA	382	341	12%	\$2,395,503	\$2,561,656	-6%	\$6.27	\$7.50	-
GUYANA	366	270	36%	\$2,422,271	\$1,564,049	55%	\$6.62	\$5.80	:
MEXICO	301	1,025	-71%	\$3,250,083	\$9,457,596	-66%	\$10.81	\$9.23	:
BANGLA-DESH	211	64	230%	\$3,183,700	\$608,200	423%	\$15.08	\$9.51	5
VENEZUELA	168	229	-27%	\$1,067,720	\$1,223,225	-13%	\$6.37	\$5.35	:
CANADA	140	271	-48%	\$2,034,914	\$2,073,095	-2%	\$14.55	\$7.66	5
GUATEMALA	120	104	15%	\$1,318,266	\$796,016	66%	\$11.02	\$7.66	4
PANAMA	115	61	89%	\$1,881,965	\$874,722	115%	\$16.37	\$14.39	:
NICARAGUA	63	104	-40%	\$519,629	\$725,132	-28%	\$8.31	\$6.95	:
SPAIN	48	18	164%	\$393,353	\$153,980	155%	\$8.19	\$8.48	.
PHILIPPINES	42	60	-29%	\$59,937	\$155,757	-62%	\$1.41	\$2.61	-
SRI LANKA	41	0	NA	\$365,468	0	NA	\$8.81	NA	.
TOTAL	76,474	51,057	50%	\$643,434,065	\$422,698,002	52%	\$8.41	\$8.28	.

Source: The National Oceanic and Atmospheric Administration's trade data.

Top 20 US shrimp import sources by volume, First Half of 2021						
Country	Jan.-June 2021 Volume (metric tons)	Jan.-June 2020 Volume (metric tons)	% change	Jan.-June 2021 value	Jan.-June 2020 value	% change
INDIA	143,143	111,604	28%	\$1,212,482,258	\$956,880,845	27%
ECUADOR	90,289	48,473	86%	\$609,503,750	\$294,704,419	107%
INDONESIA	88,883	77,421	15%	\$772,311,065	\$666,196,956	16%
VIETNAM	31,998	21,485	49%	\$323,359,904	\$224,322,684	44%
THAILAND	15,956	15,925	0%	\$176,852,163	\$175,991,111	0%
MEXICO	8,863	9,242	-4%	\$105,261,820	\$108,340,780	-3%
ARGENTINA	7,891	6,797	16%	\$86,453,603	\$74,111,346	17%
CHINA	3,634	5,713	-36%	\$19,209,621	\$28,996,992	-34%
PERU	3,188	3,293	-3%	\$24,286,428	\$22,805,387	6%
GUYANA	1,709	1,957	-13%	\$11,181,926	\$11,264,111	-1%
BANGLADESH	1,305	579	125%	\$17,177,566	\$10,861,581	58%
SAUDI ARABIA	1,031	850	21%	\$6,621,940	\$6,130,708	8%
HONDURAS	848	848	0%	\$6,181,019	\$6,486,152	-5%
VENEZUELA	714	1,427	-50%	\$4,394,172	\$6,954,806	-37%
CANADA	700	606	15%	\$8,381,665	\$6,013,430	39%
GUATEMALA	685	758	-10%	\$6,740,107	\$6,472,240	4%
PHILIPPINES	503	403	25%	\$1,504,693	\$1,716,339	-12%
NICARAGUA	484	613	-21%	\$3,662,654	\$4,507,666	-19%
SRI LANKA	265	26	904%	\$2,607,087	\$262,915	89%
PANAMA	240	268	-11%	\$3,765,362	\$3,359,587	12%
TOTAL	403,668	309,270	31%	\$3,417,537,395	\$2,629,264,675	30%

Source: The National Oceanic and Atmospheric Administration's trade data.

Um ritmo tórrido de compra de camarão

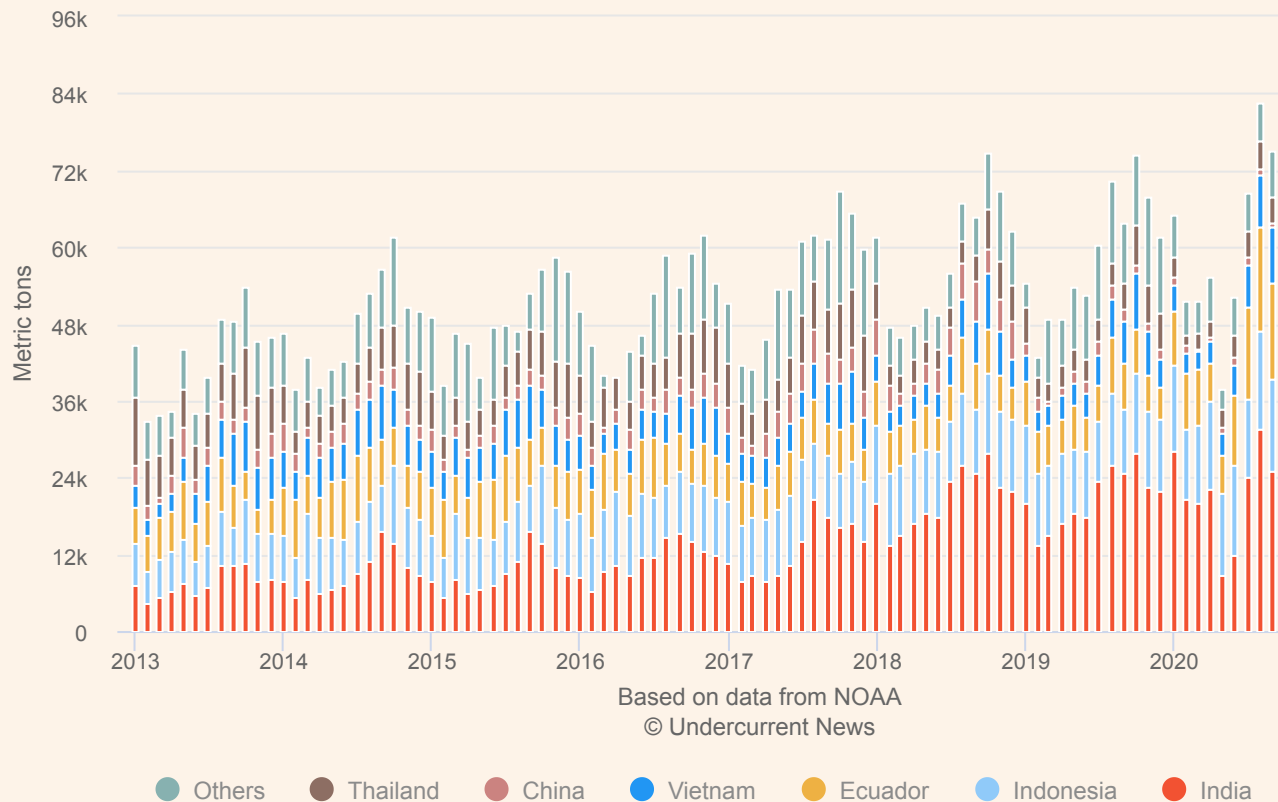
No geral, os EUA continuam em um ritmo tórrido de compra de camarão em 2021. Eles importaram 76.474 t no valor de \$ 643,4 milhões em junho de 2021, um aumento de 50% em volume e 52% em valor em relação ao mês de junho de 2020, atingido pela pandemia. o preço médio pago foi de \$ 8,41 / kg, 2% acima dos \$ 8,28 / kg pagos em junho de 2020, mas menos de 1% da média de \$ 8,46 / kg registrada em maio de 2021.

Além disso, nos primeiros seis meses do ano, os EUA importaram 403.668 t de camarão no valor de US \$ 3,4 bilhões, um aumento de 31% em volume e 30% em valor.

Junho marcou o sétimo mês consecutivo de um aumento geral no volume de importação de camarão em relação ao ano anterior. Embora seja importante observar que o setor de importação de camarão dos Estados Unidos viu apenas dois meses de queda no volume de importação de camarão ano a ano nos últimos tempos (maio e novembro de 2020).

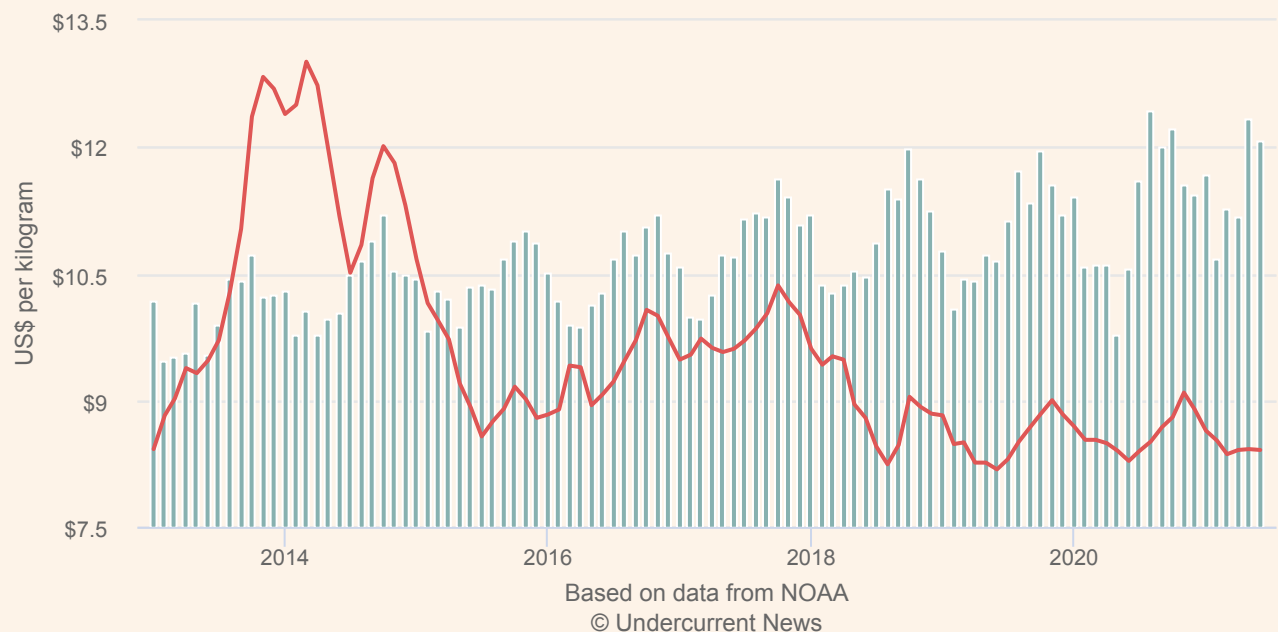
US shrimp imports by country

Monthly volume, Jan 2013 -



US shrimp imports

Monthly volume and average value, Jan 2013 -



O retorno do COVID da Índia continua

Apesar da recente escalada do Equador, a Índia respondeu por 33% de todo o camarão importado pelos EUA em junho de 2021. Enviou US 25.509 toneladas métricas no valor de \$ 210,8 milhões, um aumento de 116% em volume e 105% em valor a partir de junho de 2020.

Em contraste, o Equador foi responsável por 29% de todas as importações de camarão dos EUA durante o mês.

Undercurrent reported earlier how May marked an apparent comeback for the Indian shrimp industry from a bad bout with COVID-19, impacting its workforce. India had been on a downward spiral, experiencing four straight months of year-on-year declines in shrimp exports to the US from Jan. thru April 2021.

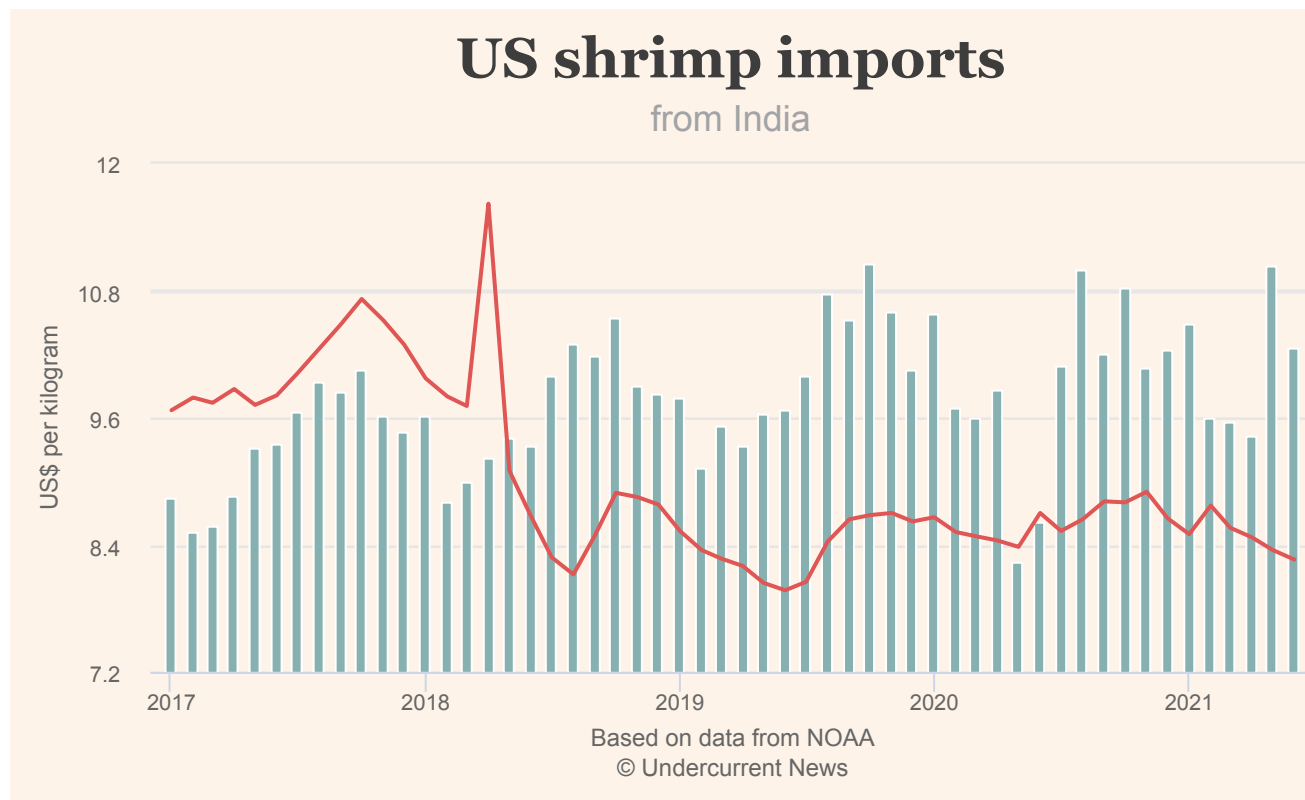
But the 31,972t of shrimp sent to the US in May was the biggest month since Aug. 2020.

Reuters reported Tuesday that India experienced 28,204 new COVID-19 infections over the previous 24 hours, the lowest since March 16, based on government data. India's overall caseload touched 32m. It reported having 428,682 deaths.

India is only the third country in the world, behind the US and Brazil, to record more than 400,000 deaths.

Despite its struggles, India has managed to send the US 143,143t of shrimp worth \$1.2bn during the first six months of 2021, an increase of 28% in volume and 27% in value compared to the first half of 2020.

The average price paid for Indian shrimp in the US in June 2021 was \$8.26/kg, down 5% from June 2020.



Ecuador watching Asia with dread

Now it's the Indonesian shrimp industry's turn to grapple with the spread of the highly transmissible delta variant that was first identified in India and has quickly become Asia's coronavirus epicenter. *Reuters* reported earlier this week that Indonesia has recorded more than 3.5m cases and 425,700 deaths.

The country saw only a minor drop in y-o-y volume of shrimp exported to the US in June 2021, sending 13,602t, though the value remained flat at about \$118.5m. The average price for Indonesian shrimp in June was \$8.71/kg, up 5% y-o-y.

Over the first six months of 2021, Indonesia sent the US 88,883t of shrimp worth \$666.2m, a 15% increase in volume and 16% increase in value.



Another major shrimp source country that is reported to be struggling with COVID is Vietnam, with the Vietnam Association of Seafood Exporters and Producers estimating that the processing capacity of the region will remain 30-40% of what it was, reducing exports by 20-30% over the rest of the year, as reported recently by *Undercurrent*.

In the first six months of 2021, however, Vietnam's exports to the US were way up. It sent the US 31,998t of shrimp, fourth among source nations, worth \$323.4m. That was a y-o-y improvement of 49% in volume and 44% in value.

Meanwhile, shrimp producers in Ecuador, which already have suffered from the pandemic, are nervously watching the situation in Asia and wondering if they'll soon get a second turn.

"We can't help but worry about the sector's near future when we see how things are developing in other shrimp-producing countries such as Vietnam, Indonesia or India," a small Ecuadorian shrimp farmer, who spoke under condition of anonymity, recently told *Undercurrent*. "The delta variant of COVID also hit Ecuador and cases have increased in the past few days to over 100 people now, so

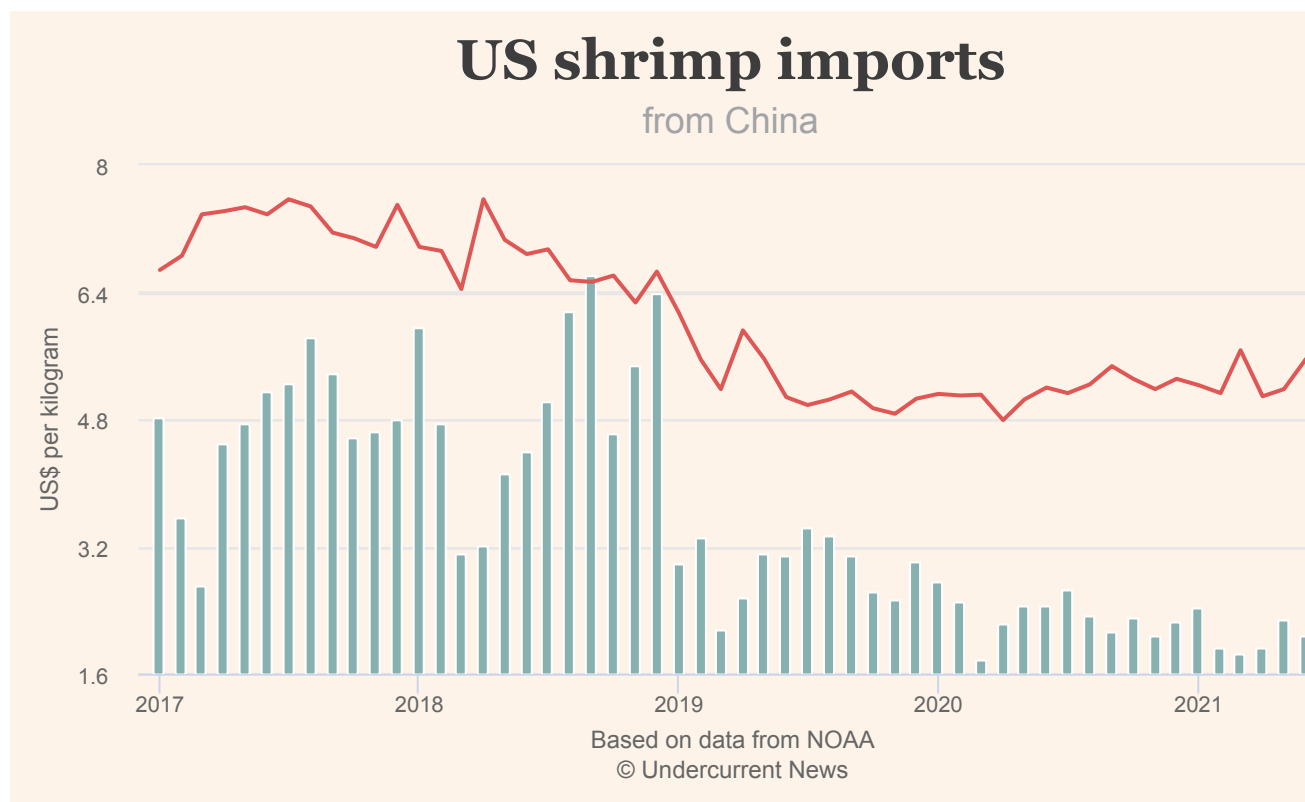
who says we are not going to be next in observing prices slump in the next few months."

China, Mexico, Thailand all in June swoon

Despite the overall increase in US shrimp imports seen in June, no less than nine of the top 20 source countries saw their y-o-y numbers dip during the month.

China, once a leading source of shrimp for the US, continues to suffer from a now three-year-old trade war. It sent the US just 607t worth \$3.4m in June, a decrease of 44% in volume and 40% in value. It garnered an average price of \$5.56/kg, up 7% over a year ago.

During the first six months of 2021, the US imported 3,634t of shrimp worth \$19.2m from China, which represents decreases of 36% in volume and 34% in value.

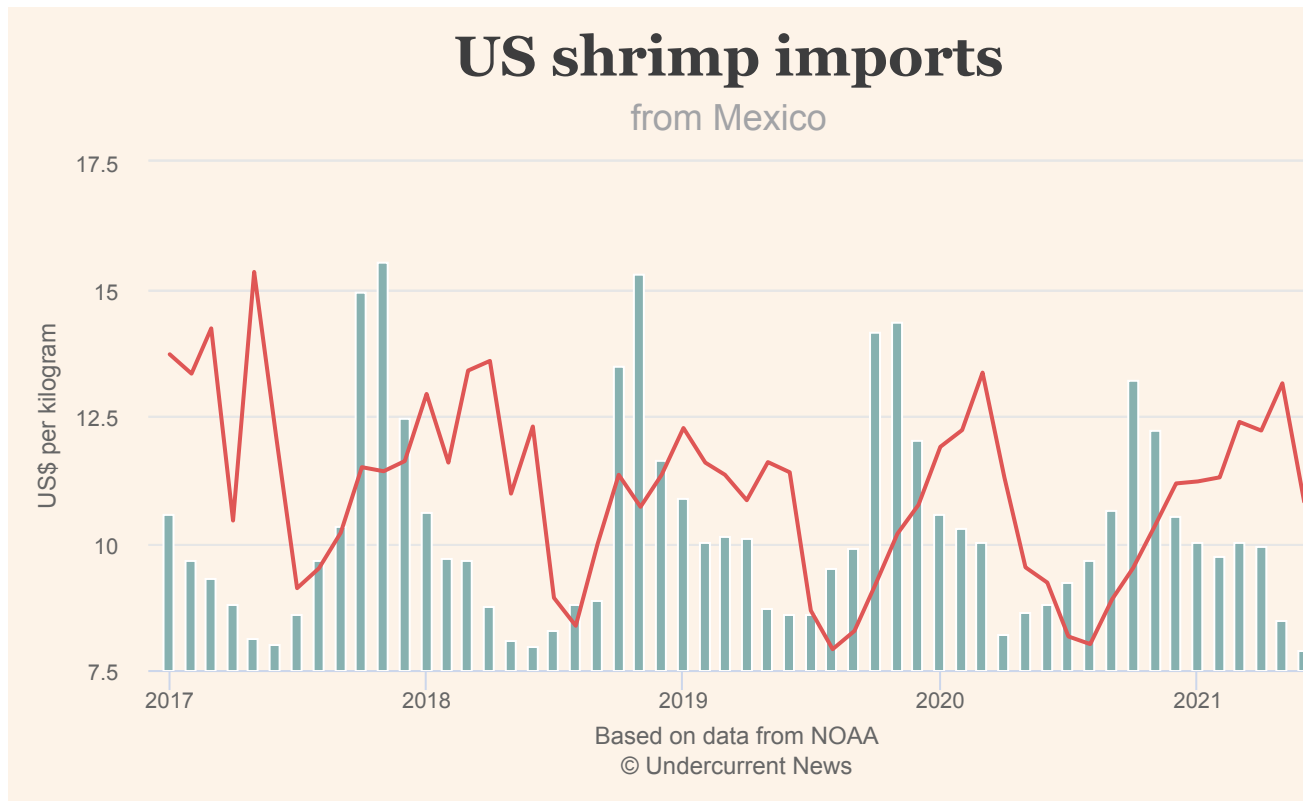


Likewise, the US imported just 301t of shrimp from Mexico worth \$3.3m in June 2021, a decrease of 71% in volume and 66% in value. The average price for Mexican shrimp was \$10.81/kg, up 17% from a year earlier.

During the first six months of 2021, Mexico sent the US 8,863t worth \$105.3m, 4% less in volume and 3% less in value. Mexico remained the sixth-largest source of shrimp for the US during the first half of 2021.

As reported by *Undercurrent*, Mexican fishery authorities and representatives from the US State Department and NOAA were set to meet Thursday (Aug. 12) in an attempt to reach agreements on high-priority issues, including the US ban on imports of Mexico's wild-caught shrimp. State, on May 1, banned wild shrimp imports from Mexico, citing endangered species regulations that require the fishery to comply with US turtle protection requirements. Then, on May 5, the

US agreed to allow shrimp imports from Mexico not caught by deep-sea trawlers as they were determined to pose no threat to the turtles.



Thailand, the US' fifth-largest source of shrimp, sent it 2,565t worth \$29.0m in June 2021, 26% less in volume and 24% less in value than in June 2020.

The Southeast Asian nation on Thursday reported a record 22,782 new coronavirus cases, bringing its total number to 839,771, according to *Reuters*. It also reported 147 new deaths, taking total fatalities to 6,942. Only about 6.5% of the country has received vaccinations and 29 of 77 provinces are in quasi-lockdown, affecting about 75% of the economy, *Bloomberg* reports.

However, in the first six months of 2021, Thailand sent the US 15,956t worth \$177.0m, which was actually less than a percentage more in volume and value than the first six months of 2020.

The average price for shrimp imported by the US from Thailand in June was among the highest of all source countries. It was \$11.31/kg, an increase of 3% y-o-y.

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