

OYSTER LANDINGS & TRADE UPDATE – 2023

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NOAA recently released their 2023 [landings, trade, and supply data](#).¹ This document provides a summary of U.S. oyster landings, trade and supply, with additional information about the Gulf Coast states.

2023 U.S. TOTALS

VOLUME: 20.93 MILLION POUNDS MEAT (17% DECREASE FROM 2022)

VALUE: \$196.78 MILLION (10% DECREASE FROM 2022)

AVG PRICE: \$9.40 PER POUND (9% INCREASE FROM 2022)

BY SPECIES

EASTERN (*C. VIRGINICA*)

- 16.75 million pounds meat (8% decrease from 2022)
- \$172.13 million value (5% decrease from 2022)
- \$10.28 per pound avg price (4% increase from 2022)

PACIFIC (*C. GIGAS*)

- 4.17 million pounds meat (8% decrease from 2022)
- \$24.60 million value (34% decrease from 2022)
- \$5.89 per pound avg price (10% increase from 2022)

BY REGION

ATLANTIC

- 8.93 million pounds meat (0% change from 2022)
- \$109.13 million value (8% increase from 2022)
- \$12.22 per pound avg price (8% increase from 2022)

GULF

- 7.82 million pounds meat (16% decrease from 2022)
- \$62.87 million value (21% decrease from 2022)
- \$8.04 per pound avg price (5% decrease from 2022)

PACIFIC

- 4.18 million pounds meat (40% decrease from 2022)
- \$24.78 million value (21% decrease from 2022)
- \$5.92 per pound avg price (10% increase from 2022)

¹ NOAA oyster landings are reported in pounds of meats (excludes shell weight). The dollar value of landings are ex-vessel (as paid to the fisherman at time of first sale) and are reported as nominal (current at the time of reporting) values. Additional information on NOAA landings data can be found [here](#). Dollar values are converted to real 2017 dollars using the U.S. Bureau of Economic Analysis GDP Implicit Price Deflator, found [here](#). Prices are implicit, calculated as total landings value in dollars divided by total landings in pounds.

U.S. LANDINGS

Total domestic landings are down 17% over last year, and still well below historical levels. Reductions are driven by decreased landings in the Gulf and Pacific regions (Figure 1). The same trends are reflected in landings by species, as Atlantic and Gulf regions produce Eastern oysters (*C. virginica*) and the Pacific region produces Pacific oysters (*C. gigas*) (Figure 2).

Figure 1. Domestic oyster landings by region, million pounds meat.

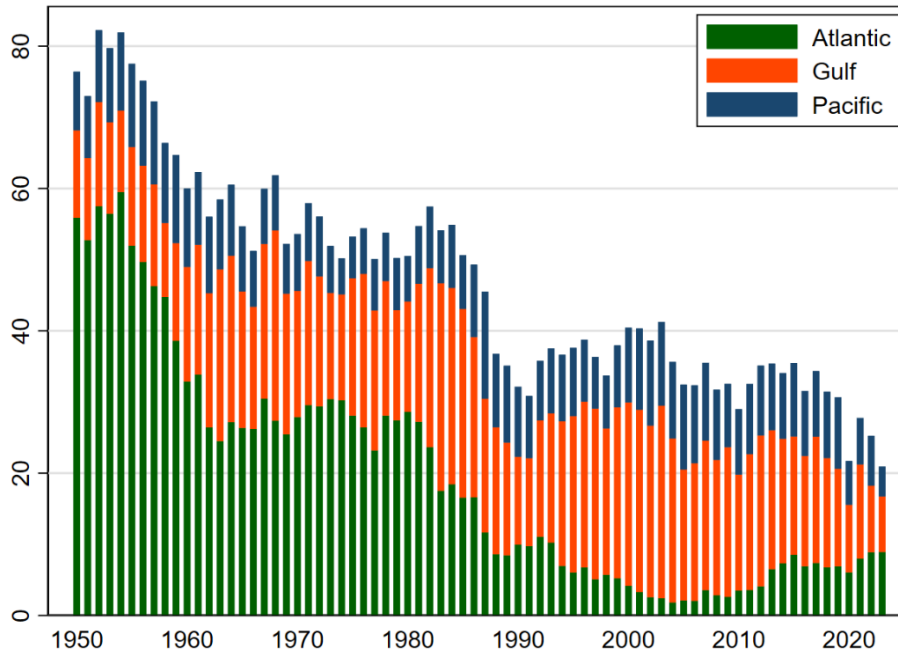
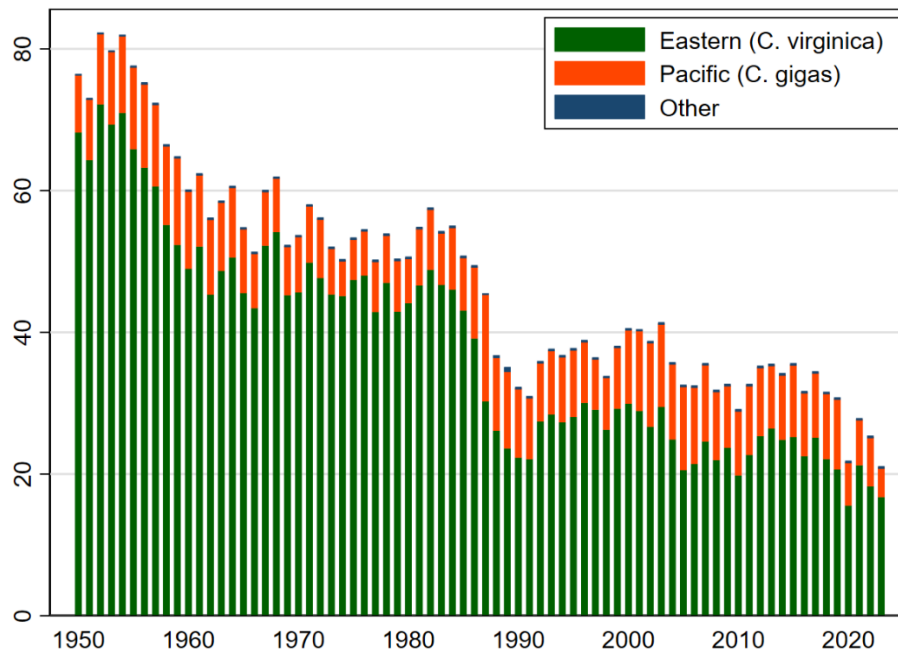


Figure 2. Domestic oyster landings by species, million pounds meat.



U.S. LANDINGS VALUE

Inflation-adjusted total landings value is down 10% from last year, but unlike landings, total values since 2010 are generally above levels observed between 1960 and 2010 (Figures 3 & 4).

Figure 3. Domestic oyster landings value by region, \$ million.

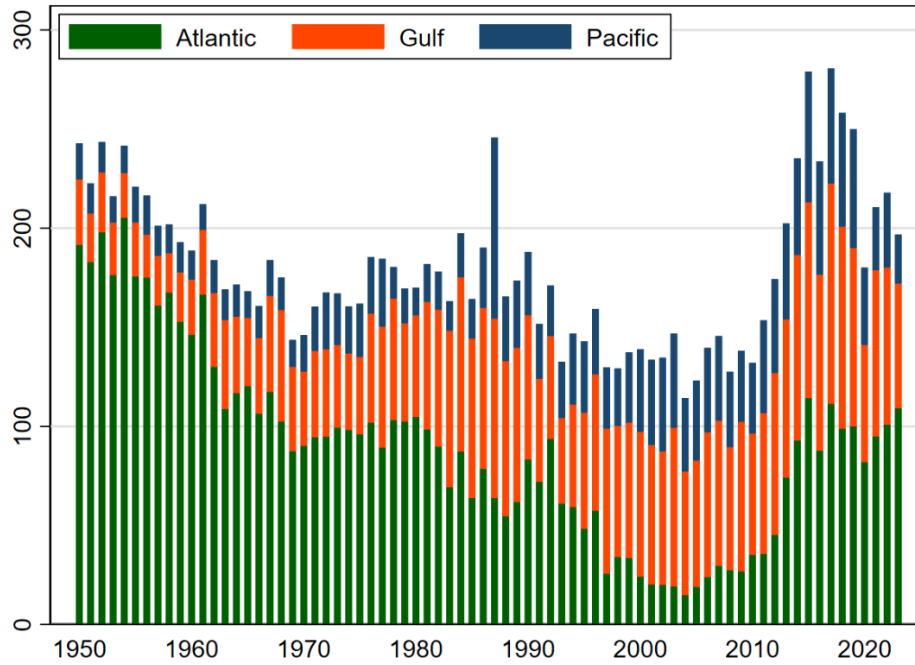
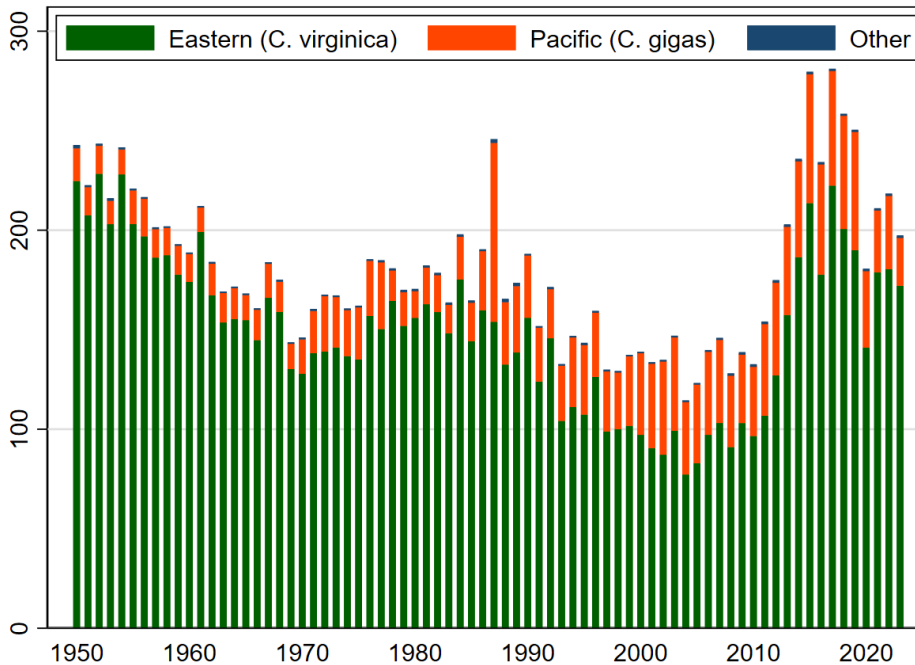


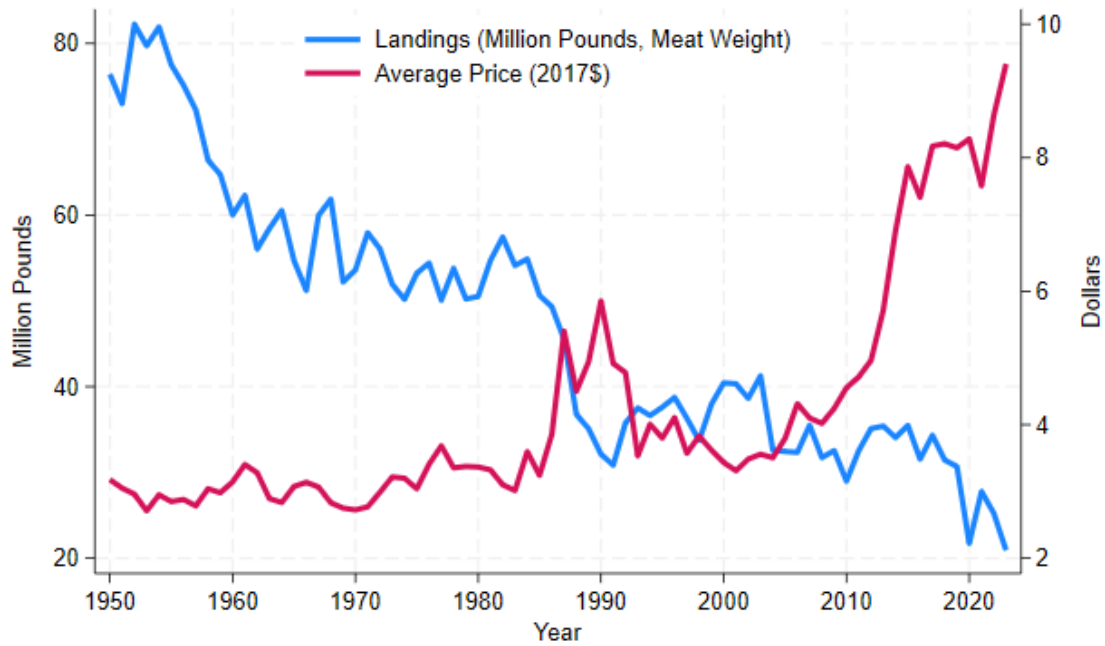
Figure 4. Domestic oyster landings value by species, \$ million.



LANDINGS COMPARED TO AVERAGE PRICES

Landings are at a historic low but average prices (dollars per pound meat in inflation-adjusted 2017\$) is at a historic high.

Figure 5. Domestic oyster landings (million pounds meat) and average prices (dollars per pound meat).



TOP 5 STATES - LANDINGS

Louisiana is the leading producer thus far during this decade (2020-2023), with 23.56 million pounds meat (25% of total domestic landings), followed by Washington (19.72 million pounds, 21%), Virginia (15.41 million pounds, 16%), Texas (13.97 million pounds, 15%), then Maryland (6.02 million pounds, 6%). In the previous decade (2010-2019), Louisiana was the leading state (33%), followed by Washington (27%), Texas (13%), Virginia (10%), then Florida (5%).

Figure 5. Top 5 landings states, by decade.

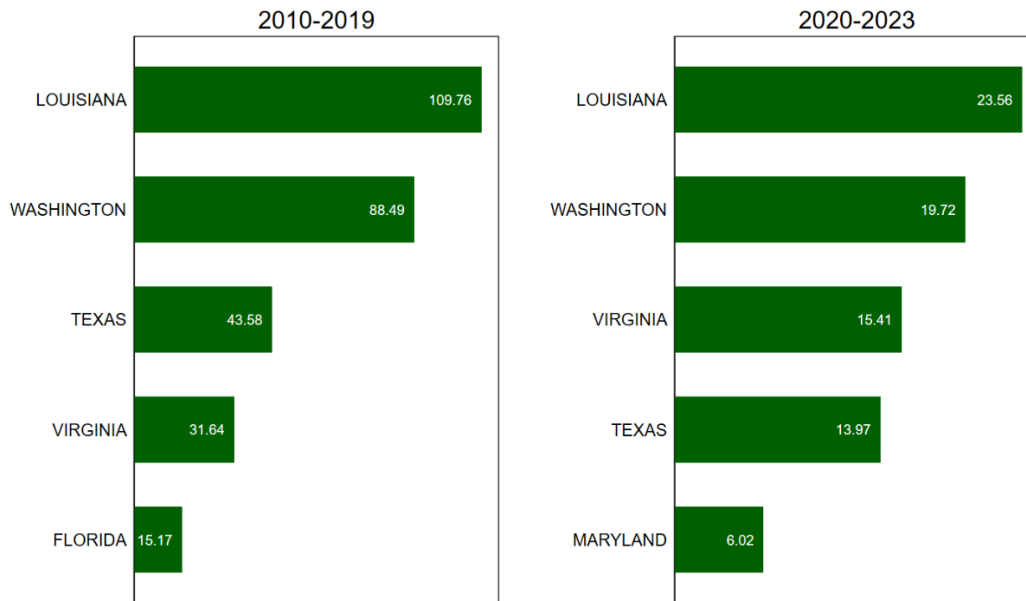
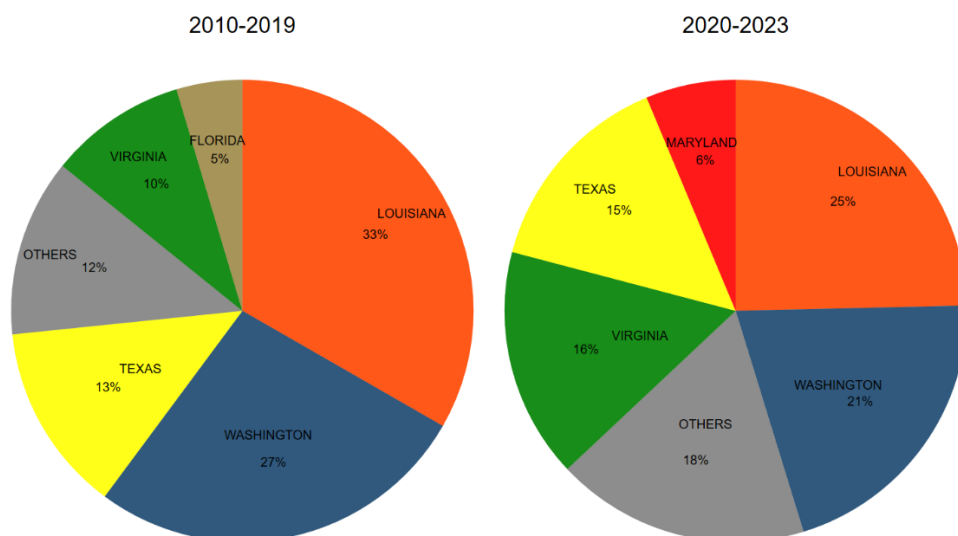


Figure 6. Shares of top 5 landings states and all other states combined, by decade.



TOP 5 STATES - VALUE

Louisiana is first in landings value during this decade (2020-2023), at \$188.10 million (23% of total value), followed by Virginia (\$129.73 million, 16%), Massachusetts (\$98.35 million, 12%), Washington (\$91.15 million, 11%), then Texas (\$75.40 million, 9%). In the previous decade (2010-2019), Louisiana was the leading state (27%), followed by Washington (20%), Virginia (13%), Texas (9%), then Massachusetts (9%).

Figure 7. Top 5 landings value states, by decade.

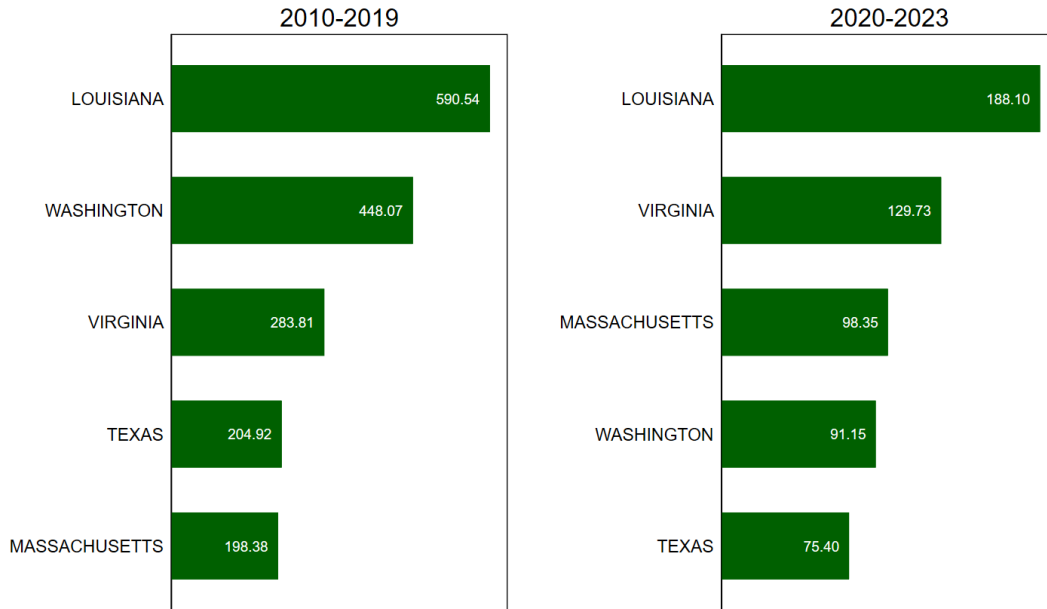
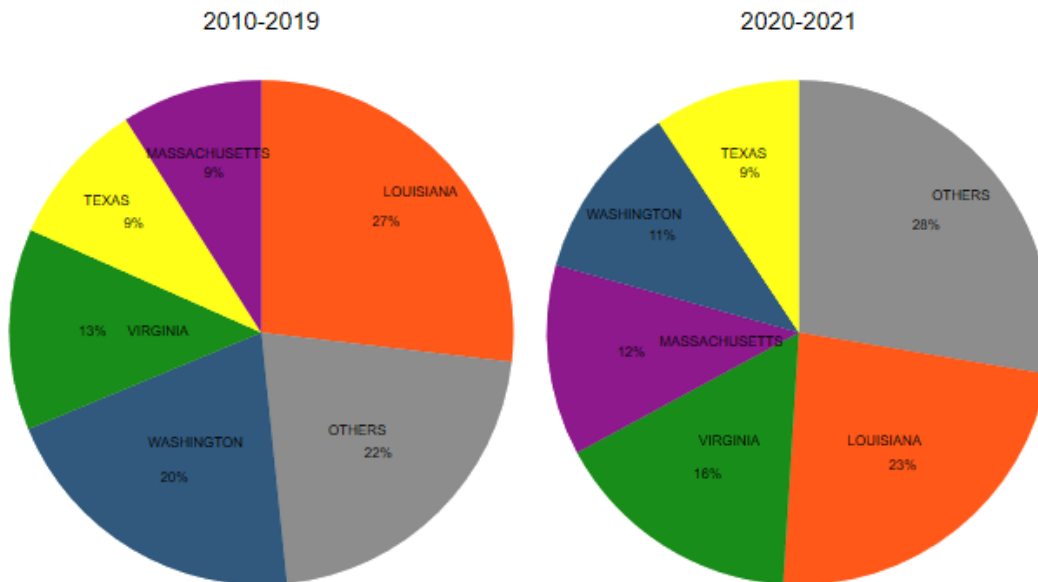


Figure 8. Shares of top 5 landings value states and all other states combined, by decade.



AVERAGE PRICES

Average inflation-adjusted dockside price are down slightly in the Gulf region (5% decrease) and up in the Atlantic (8% increase) and Pacific (10% increase) regions. By species, the Eastern oyster price is up 4% (which is the combined effect of the Atlantic and Gulf regions) while the Pacific price is up 10%.

Figure 9. Average dockside price (\$ per pound meat), inflation-adjusted, by region.

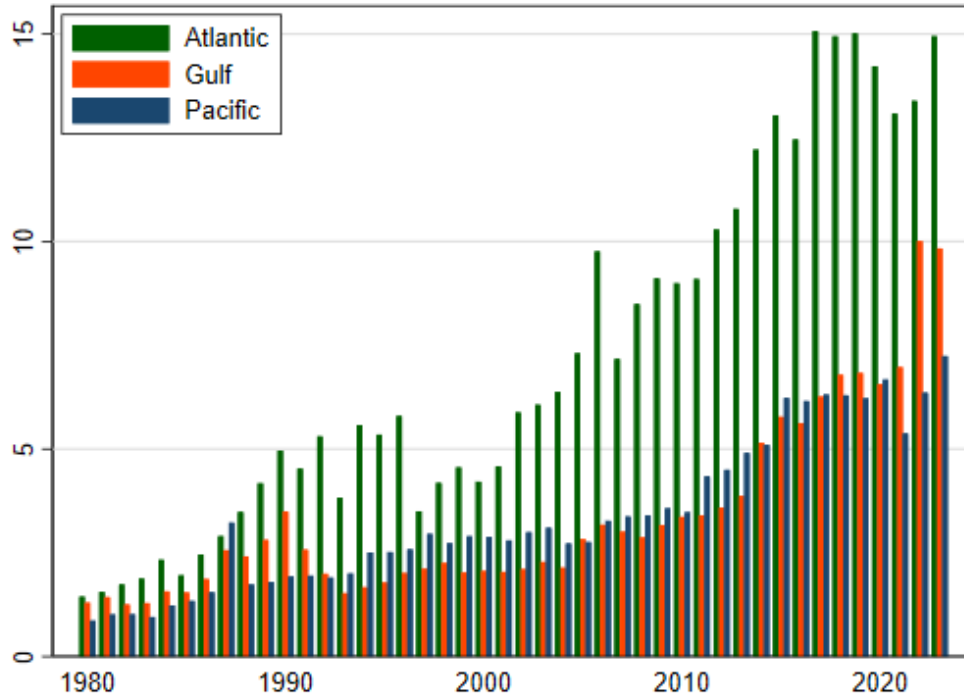
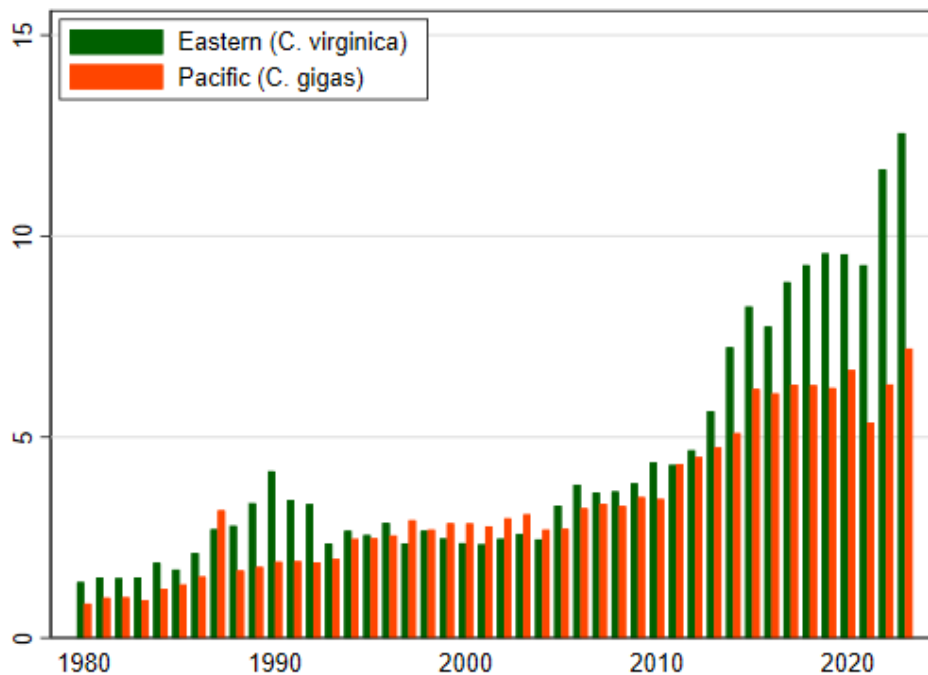


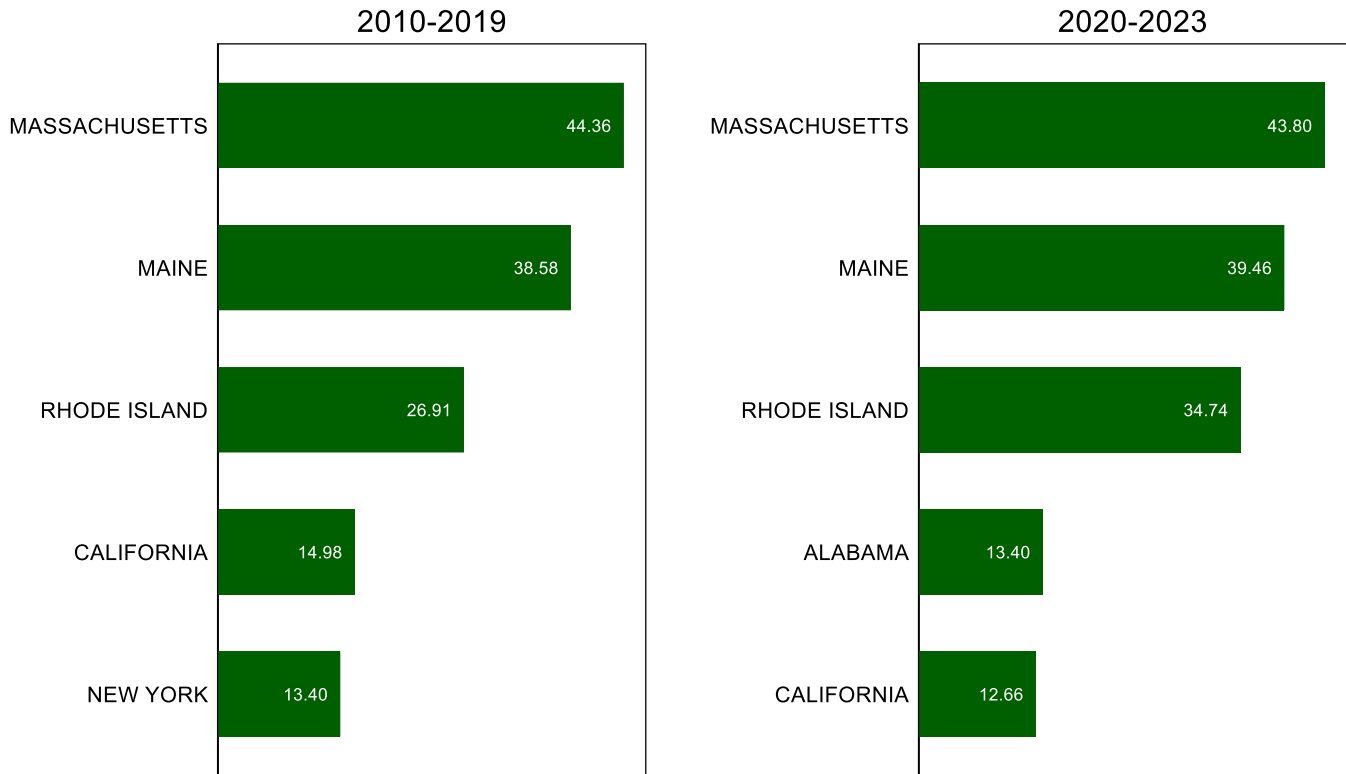
Figure 10. Average dockside price (\$ per pound meat), inflation-adjusted, by species.



TOP 5 STATES – AVERAGE PRICES

Massachusetts has the highest average dockside price during 2020-2023, at \$43.80 per pound meat, followed by Maine (\$39.46), Rhode Island (\$34.74), Alabama (\$13.40), then California (\$12.66). In the previous decade (2010-2019), Massachusetts also had the top spot, followed by Maine, Rhode Island, California, then New York.

Figure 11. Top 5 states for average prices, by decade.



GULF COAST STATES

2023 Landings

ALABAMA

0.27 million pounds meat (4% decrease from 2022)

\$3.95 million value (7% increase from 2022)

\$14.47 per pound avg price (11% increase from 2022)

FLORIDA (GULF COAST)

0.31 million pounds meat (9% increase from 2022)

\$1.63 million value (11% increase from 2022)

\$5.31 per pound avg price (1% increase from 2022)

LOUISIANA

6.09 million pounds meat (15% decrease from 2022)

\$50.41 million value (21% decrease from 2022)

\$8.28 per pound avg price (7% decrease from 2022)

MISSISSIPPI

No reported landings in 2022 or 2023.

TEXAS

1.15 million pounds meat (29% decrease from 2022)

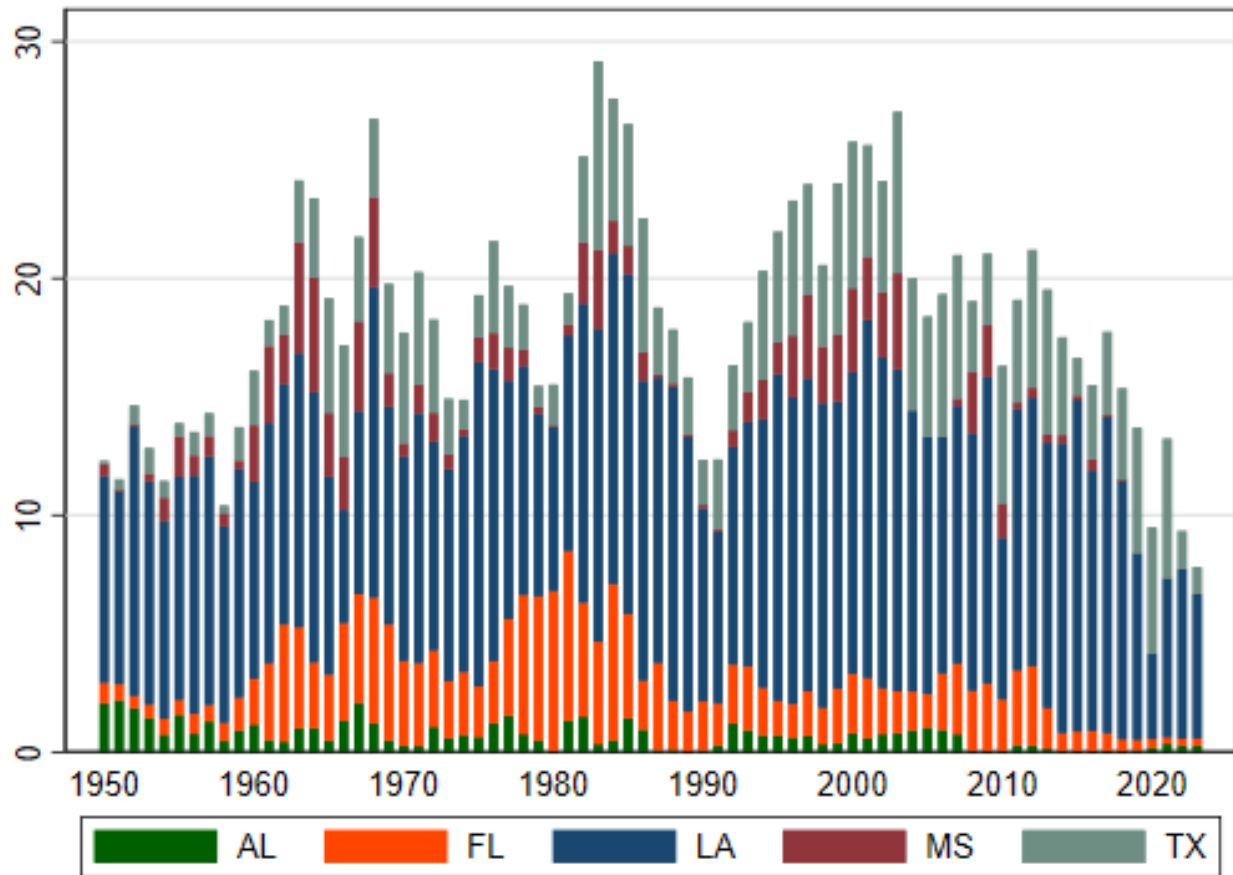
\$6.88 million value (32% decrease from 2022)

\$5.99 per pound avg price (4% decrease from 2022)

GULF COAST LANDINGS

Gulf Coast landings are down 16% from last year, and at the lowest level on record. Alabama's landings were 0.27 million pounds meat (a 4% decrease relative to last year), Louisiana's were 6.09 million pounds (down 15%), and Texas' landings were 1.15 million pounds (down 29%). Florida's landings were 0.31 million pounds, a 9% increase from last year (Figure 12). Mississippi has reported no landings since 2019.

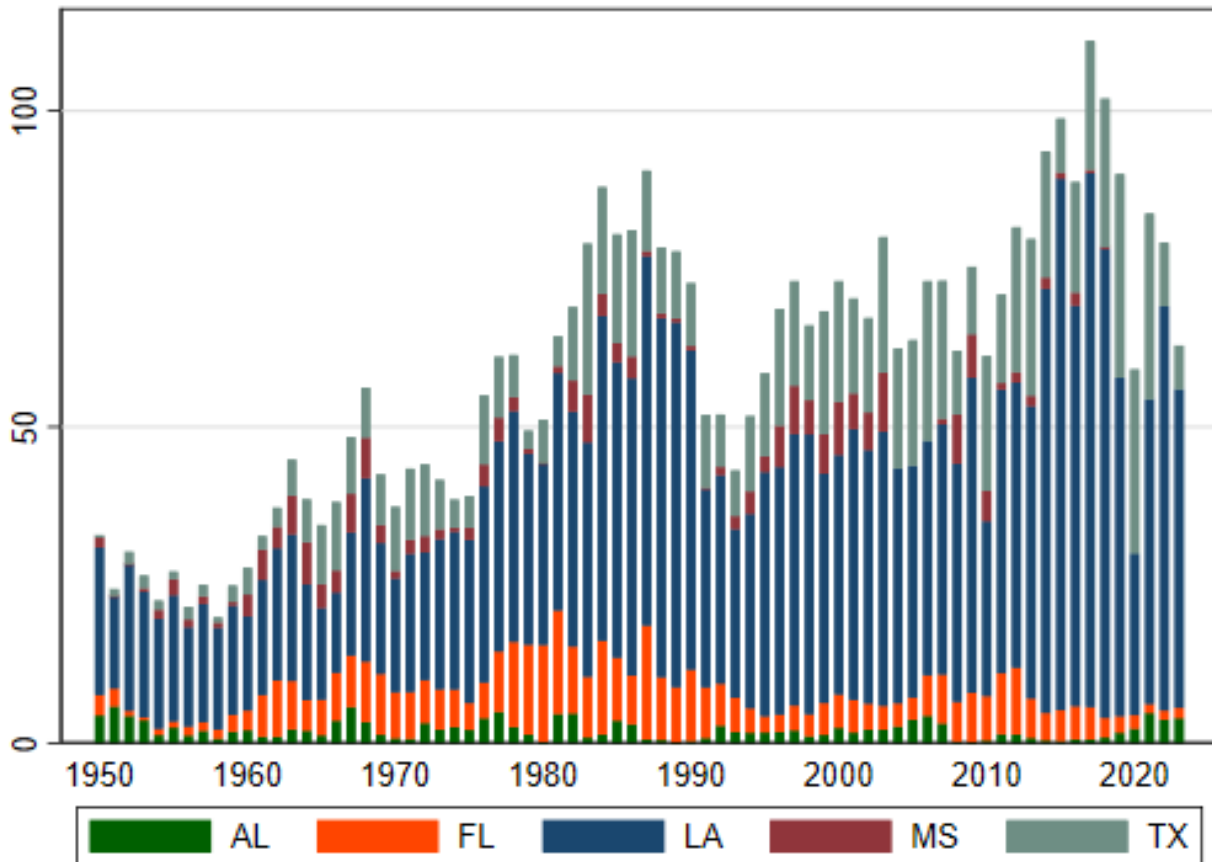
Figure 12. Gulf Coast oyster landings by state, million pounds meat.



GULF COAST LANDINGS VALUE

Gulf Coast landings value was \$62.87 million, down 21% from last year, after adjusting for inflation. Louisiana contributed \$50.41 million (a 21% decrease from 2022), Texas contributed \$6.88 million (32% decrease), Alabama contributed \$3.95 million (7% increase), and Florida contributed \$1.63 million (11% increase) (Figure 13).

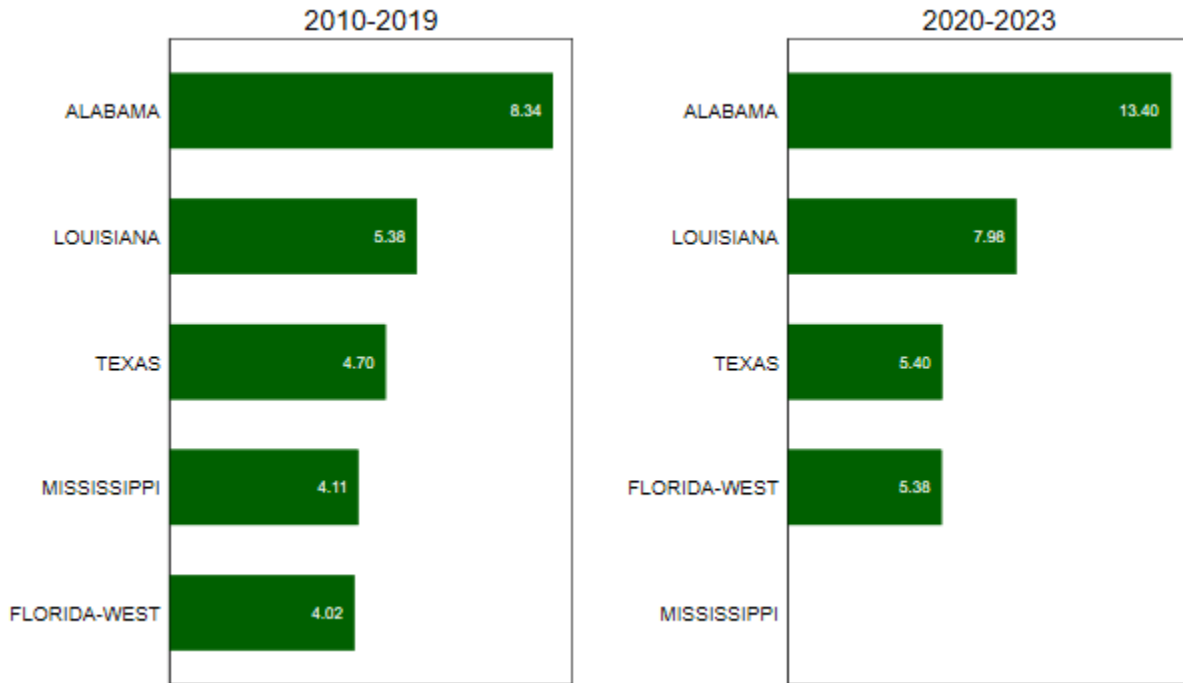
Figure 13. Gulf Coast oyster landings value by state, \$ million.



GULF COAST AVERAGE PRICES

Alabama has the highest average dockside price during 2020-2023, at \$13.40 per pound meat, followed by Louisiana (\$7.98), Texas (\$5.40), then Florida (\$5.38). In the previous decade (2010-2019), Alabama also had the top spot, followed by Louisiana, Texas, Mississippi, then Florida (Figure 14).

Figure 14. Gulf Coast average prices (\$ per pound meat), by decade.

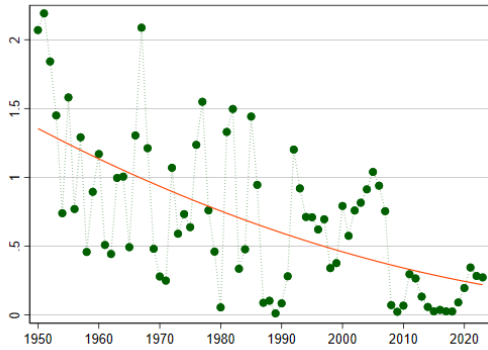


INDIVIDUAL STATE HISTORICAL LANDINGS AND TRENDS

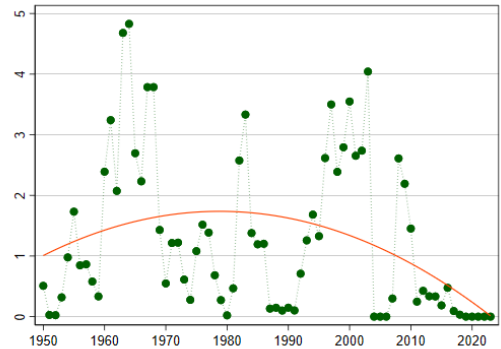
Gulf Coast States

Figure 16. Gulf Coast state historical landings and trends, in million pounds meat.

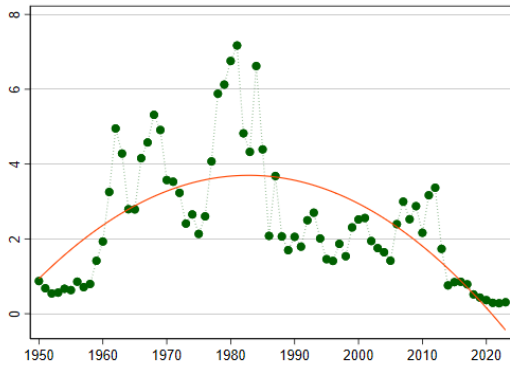
Alabama



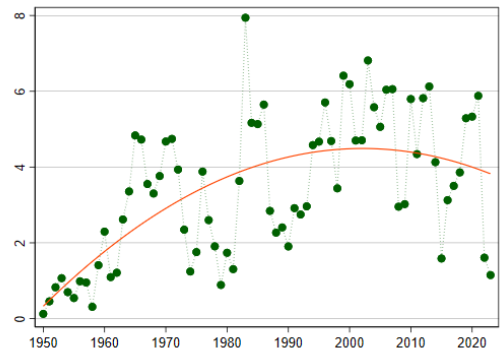
Mississippi



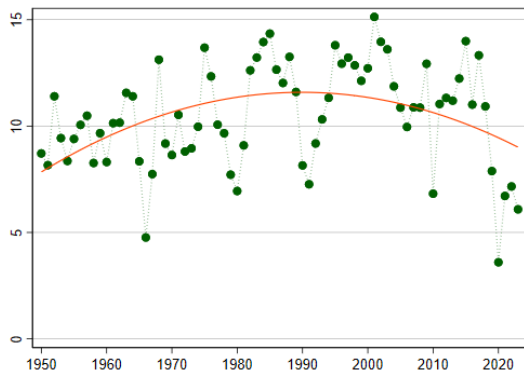
Florida (Gulf Coast)



Texas



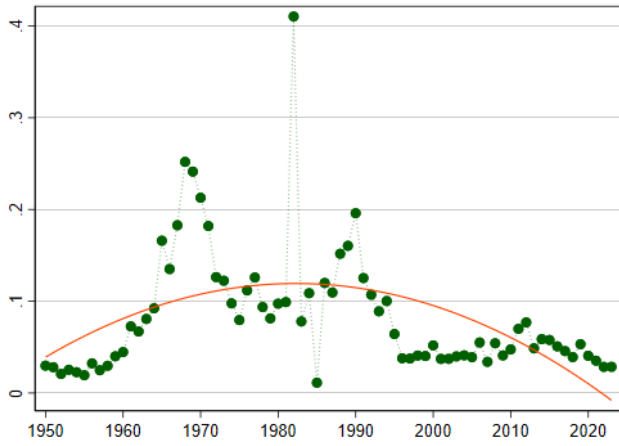
Louisiana



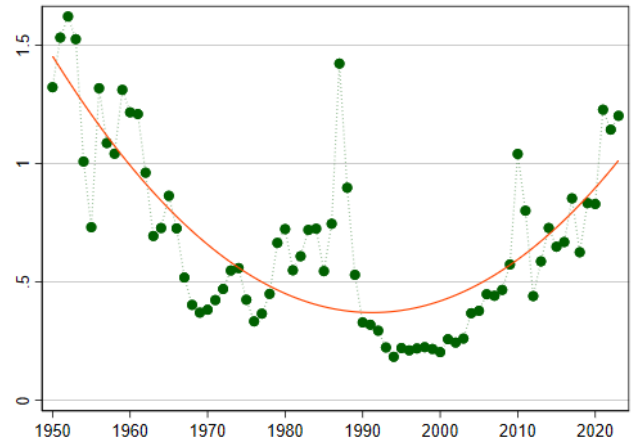
South Atlantic States

Figure 17. South Atlantic state historical landings and trends, in million pounds meat.

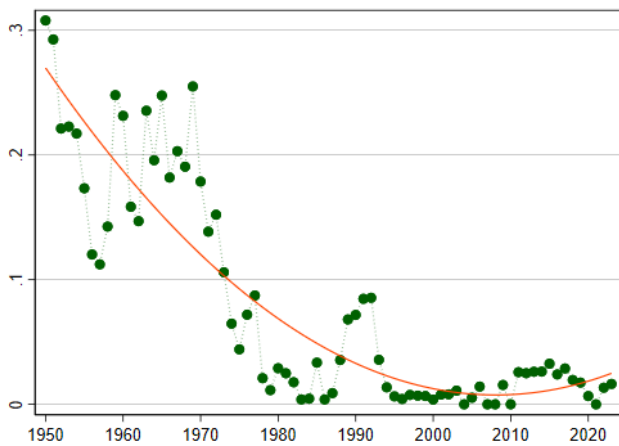
Florida (Atlantic Coast)



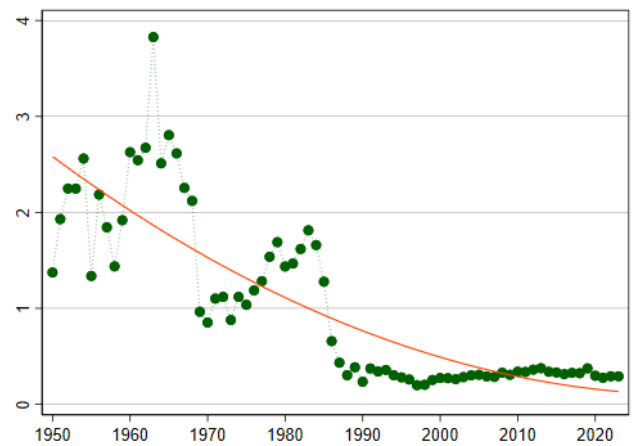
North Carolina



Georgia



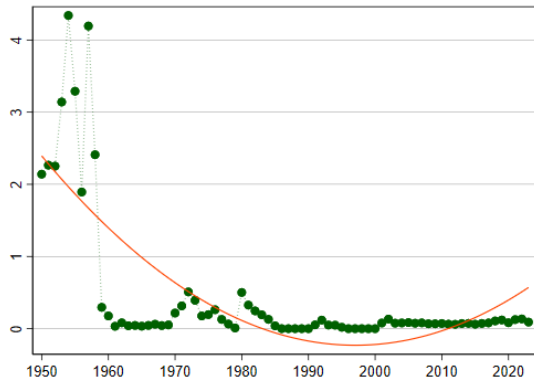
South Carolina



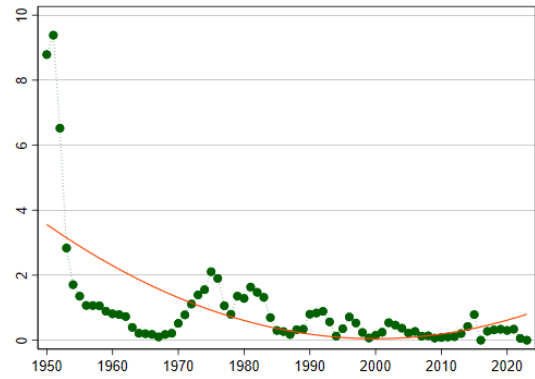
Mid-Atlantic States

Figure 18. Mid-Atlantic state historical landings and trends, in million pounds meat.

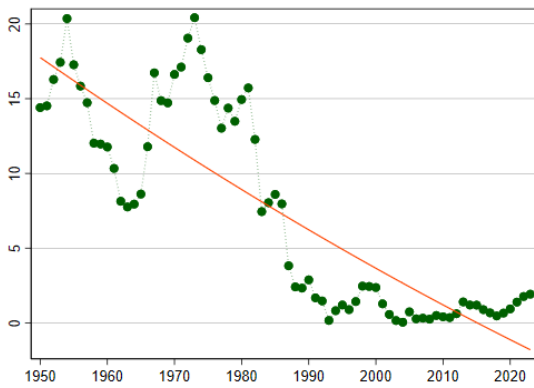
Delaware



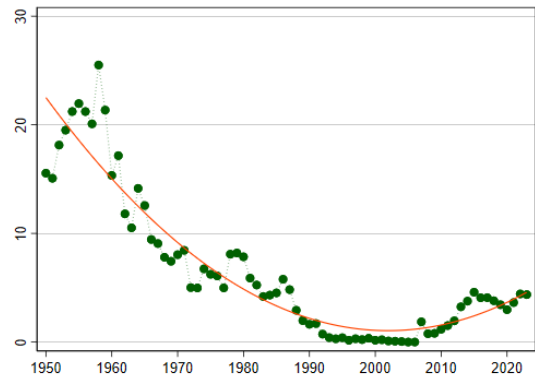
New York



Maryland



Virginia



New Jersey

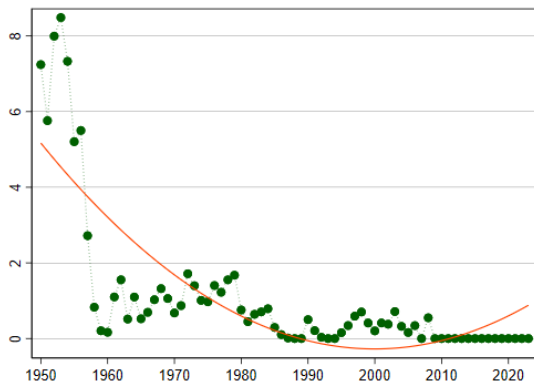
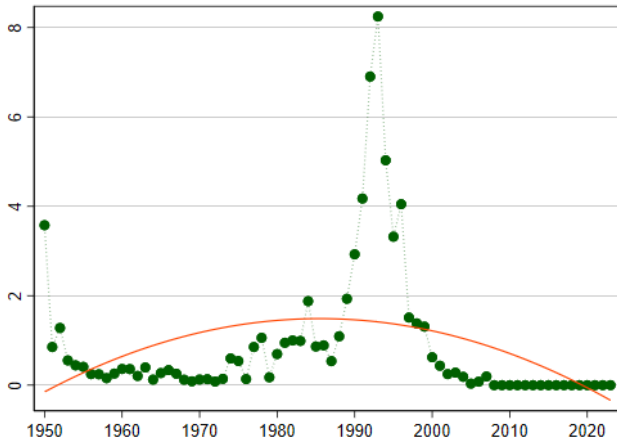
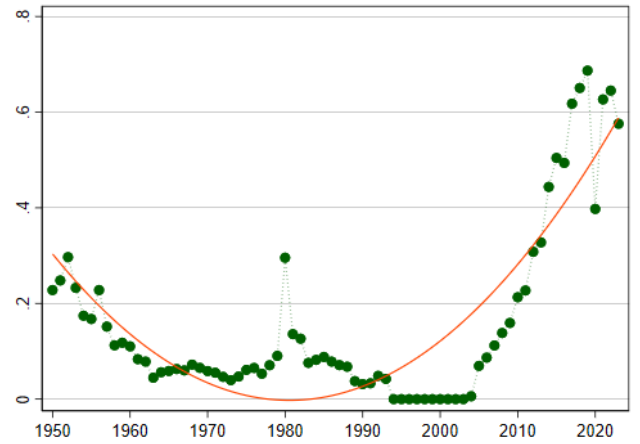


Figure 19. South Atlantic state historical landings and trends, in million pounds meat.

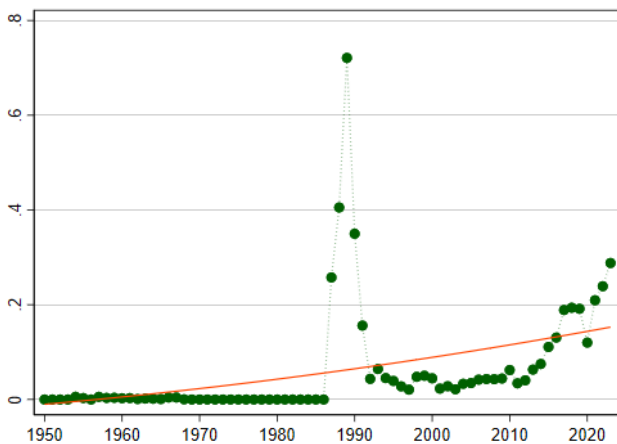
Connecticut



Massachusetts



Maine



Rhode Island

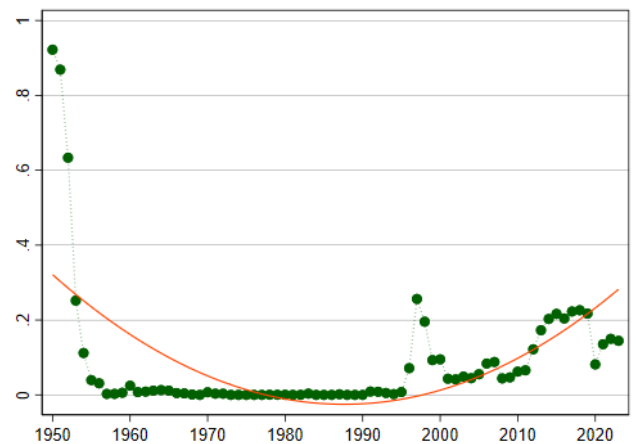
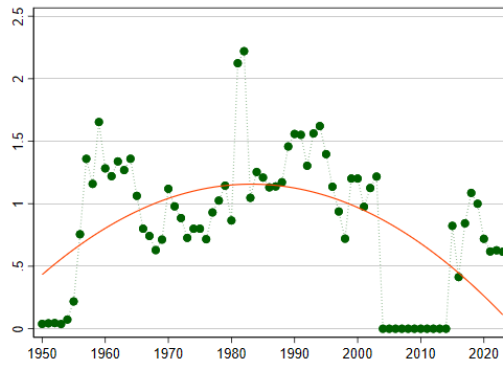
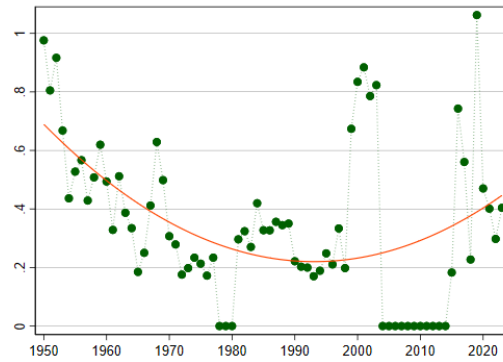


Figure 20. Pacific state historical landings and trends, in million pounds meat.

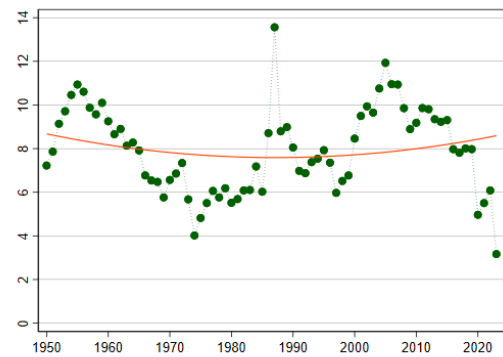
California



Oregon



Washington



TRADE

Imports were 40.8 million pounds meat, down 17% relative to last year, but still up relative to previous years. Imports surpassed domestic landings in 2015 and the gap has widened since 2019. Imports now account for over two-thirds of domestic use. Exports are up slightly in 2023, at 4.72 million pounds. The trade balance stands at -\$81.66 million.

2023 U.S. IMPORTS

VOLUME: 40.80 MILLION POUNDS MEAT (17% DECREASE FROM 2022)
VALUE: \$98.06 MILLION (24% DECREASE FROM 2022)

2023 U.S. EXPORTS

VOLUME: 4.72 MILLION POUNDS MEAT (7% INCREASE FROM 2022)
VALUE: \$16.40 MILLION (7% INCREASE FROM 2022)

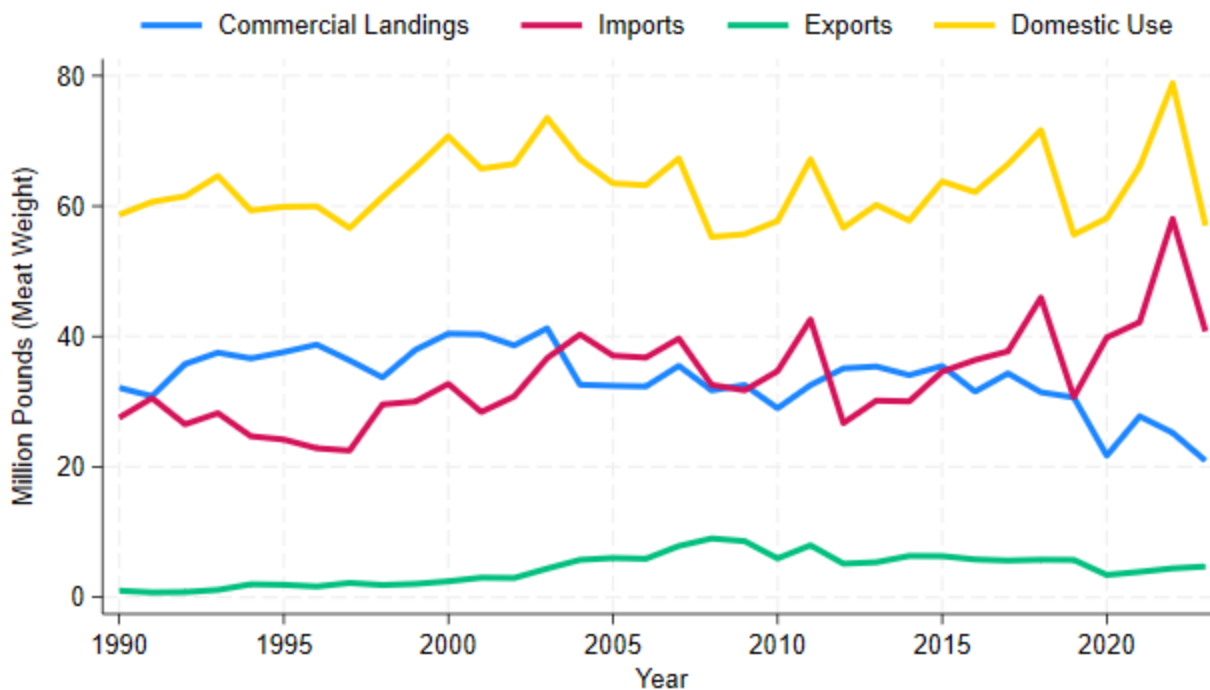
2023 TRADE BALANCE

-36.08 MILLION POUNDS | -\$81.66 MILLION

2023 TOTAL DOMESTIC USE

DOMESTIC PRODUCTION (20.93 MILLION POUNDS) + IMPORTS (40.80 MILLION POUNDS) – EXPORTS (4.72 MILLION POUNDS)
= 57.01 MILLION POUNDS

Figure 21. Commercial landings, imports, exports, and domestic use, in million pounds meat.



TRADE BY COUNTRY & PRODUCT TYPE

Ninety-five percent of all oyster imports come from four countries. Canada is #1, accounting for 38% of the value of all imports over the last five years (2019-2023), followed by China (24%), South Korea (22%), and Mexico (10) (Figure 21). Nearly all imports from Canada are live/fresh oysters, whereas nearly all imports from China are canned oysters. Mexico sends primarily live/fresh oysters with a smaller fraction of frozen oysters. South Korea sends mostly frozen oysters, along with canned oysters, and smaller shares of live/fresh and other oysters (Figure 22).

Figure 21. Import value shares during past 5 years (2019-2023).

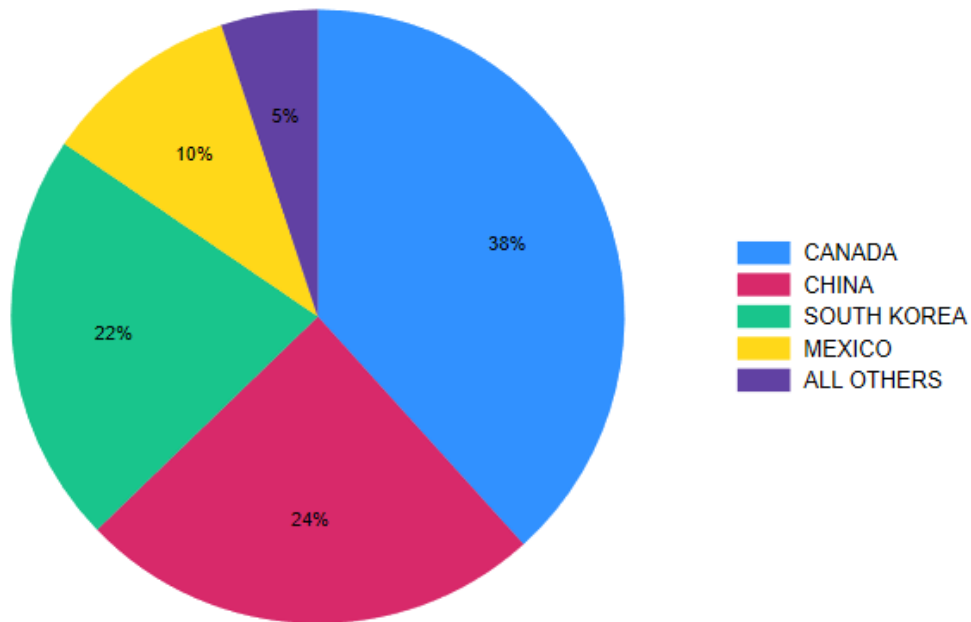
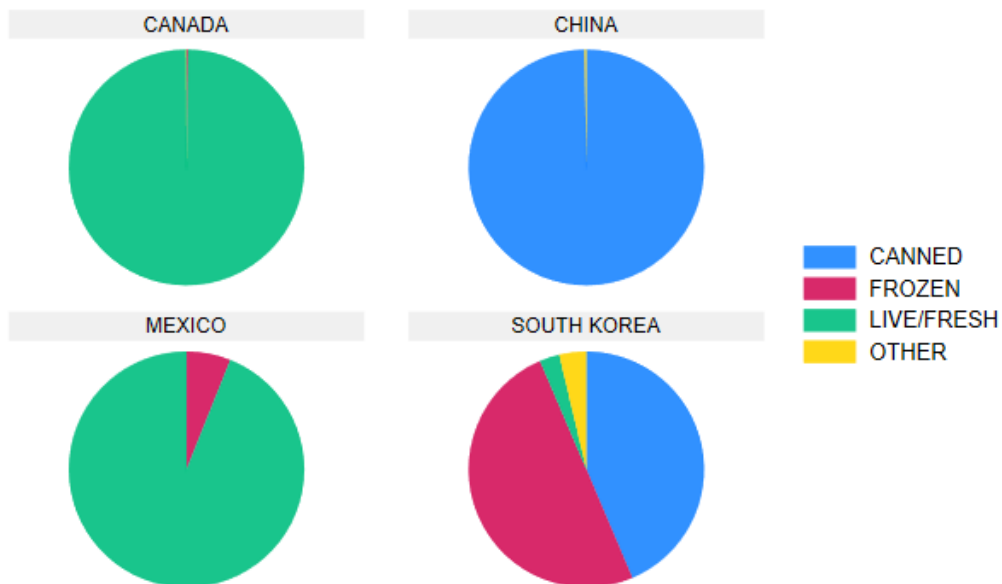


Figure 22. Import value shares by country and product type during past 5 years (2019-2023).



TRADE BY COUNTRY & PRODUCT TYPE, continued

Oyster imports from Canada and Mexico surged in 2021 and these two countries now send more oysters, by value, to the U.S. than the rest of the world combined (Figure 23). Live/fresh oyster imports also surged in 2021, and this product category now accounts for more imports, by value, than all other product types combined (Figure 24). Thus, the recent increases in imports are driven by live/fresh oysters from Canada and Mexico.

Figure 23. Imports from Canada and Mexico versus Rest of the World.

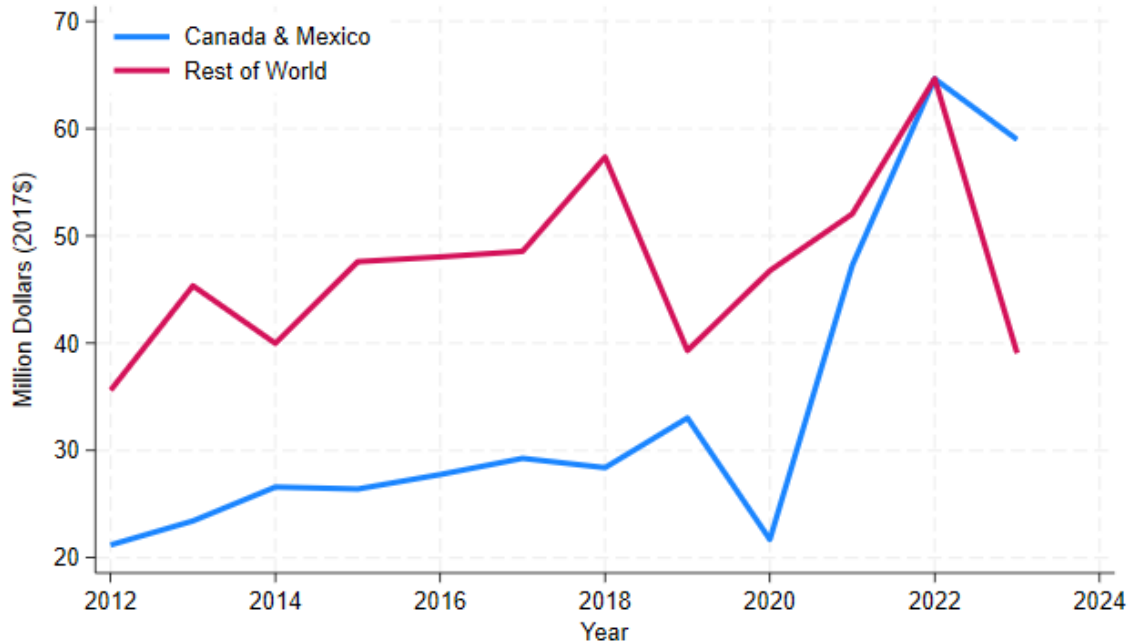


Figure 24. Live/fresh oyster imports versus all other product types.

