USA: World's Largest Tilapia Market

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INFOFISH, TILAPIA 2015

Kuala Lumpur

3 April 2015

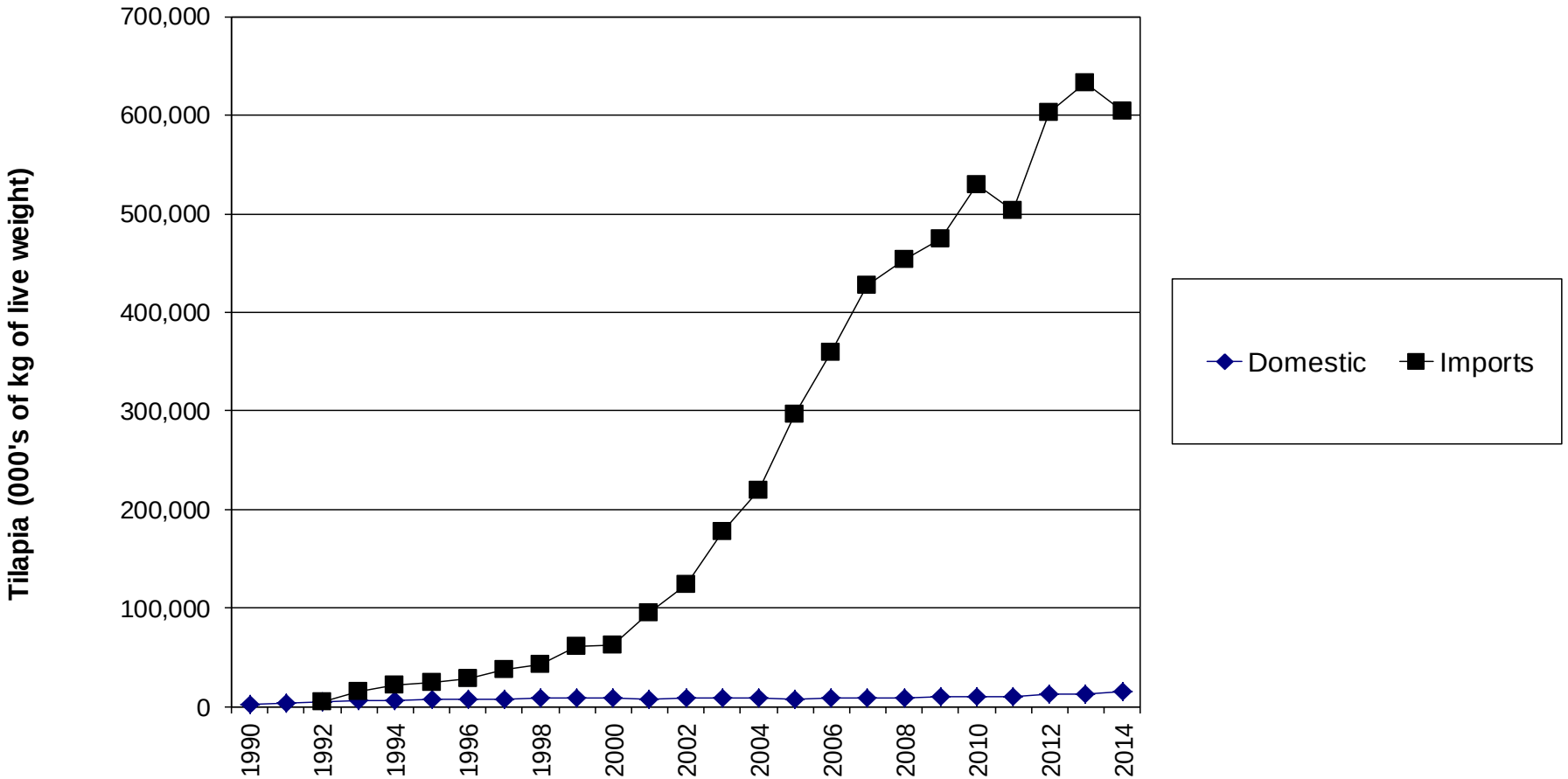
Tilapia: continuing to increase in popularity in US

- Fourth most popular seafood.
- Second most popular fish purchased in grocery stores
- As wild caught fish continues to increase in cost, tilapia will be substituted
- Tilapia is most common seafood in food service (schools, hospitals, prisons)

Top Ten Seafoods (U.S.) per capita (lbs)

2000	2001	2002	2003	2005	2006	2007	2008	2009	2010	2011	2012	2013
Tuna 3	Shrimp 3	Shrimp 3.7	Shrimp 4.0	Shrimp 4.1	Shrimp 4.4	Shrimp 4.1	Shrimp 4	Shrimp 4.1	Shrimp 4.0	Shrimp 4.2	Shrimp 3.8	Shrimp 3.6
Shrimp 3.2	Tuna 2.9	Tuna 3.1	Tuna 3.4	Tuna 3.1	Tuna 2.9	Tuna 2.7	Tuna 2.8	Tuna 2.5	Tuna 2.7	Tuna 2.6	Tuna 2.4	Salmon 2.7
Pollock 1.6	Salmon 2.0	Salmon 2.0	Salmon 2.2	Salmon 2.4	Salmon 2.0	Salmon 2.4	Salmon 1.8	Salmon 2.0	Salmon 2.0	Salmon 2.0	Salmon 2.0	Tuna 2.3
Salmon 1.5	Pollock 1.2	Pollock 1.1	Pollock 1.7	Pollock 1.5	Pollock 1.6	Pollock 1.7	Pollock 1.34	Pollock 1.45	Tilapia 1.45	Pollock 1.3	**Tilapia 1.5**	**Tilapia 1.5**
Catfish 1.1	Catfish 1.1	Catfish 1.1	Catfish 1.1	Catfish 1.0	Tilapia 1.0	Tilapia 1.14	Tilapia 1.19	Tilapia 1.21	Pollock 1.2	Tilapia 1.3	Pollock 1.2	Pollock 1.1
Cod 0.8	Cod 0.6	Cod 0.7	Cod 0.6	Tilapia 0.8	Catfish 0.97	Catfish 0.90	Catfish 0.92	Catfish 0.85	Catfish 0.8	Pangasius 0.6	Pangasius 0.7	Pangasius 0.7
Clams 0.5	Clams 0.5	Crabs 0.6	Crabs 0.6	Crabs 0.6	Crabs 0.7	Crabs 0.68	Crabs 0.61	Crabs 0.59	Crabs 0.6	Catfish 0.6	Crabs 0.5	Cod 0.6
Crabs 0.4	Crabs 0.4	Clams 0.5	Tilapia 0.5	Cod 0.6	Cod 0.5	Cod 0.47	Cod 0.44	Cod 0.42	Cod 0.5	Crabs 0.5	Cod 0.5	Catfish 0.6
Flatfish 0.4	Flatfish 0.4	Tilapia 0.4	Clams 0.5	Clams 0.4	Clams 0.4	Clams 0.45	Flatfish 0.43	Clams 0.41	Pangasius 0.4	Cod 0.5	Catfish 0.5	Crabs 0.6
Scallops 0.3	Tilapia 0.4	Flatfish 0.3	Scallops 0.3	Scallops 0.3	Scallops 0.3	Flatfish 0.32	Clams 0.42	Pangasius 0.35	Clams 0.35	Clams 0.3	Clams 0.3	Clams 0.3
Tilapia 0.3												

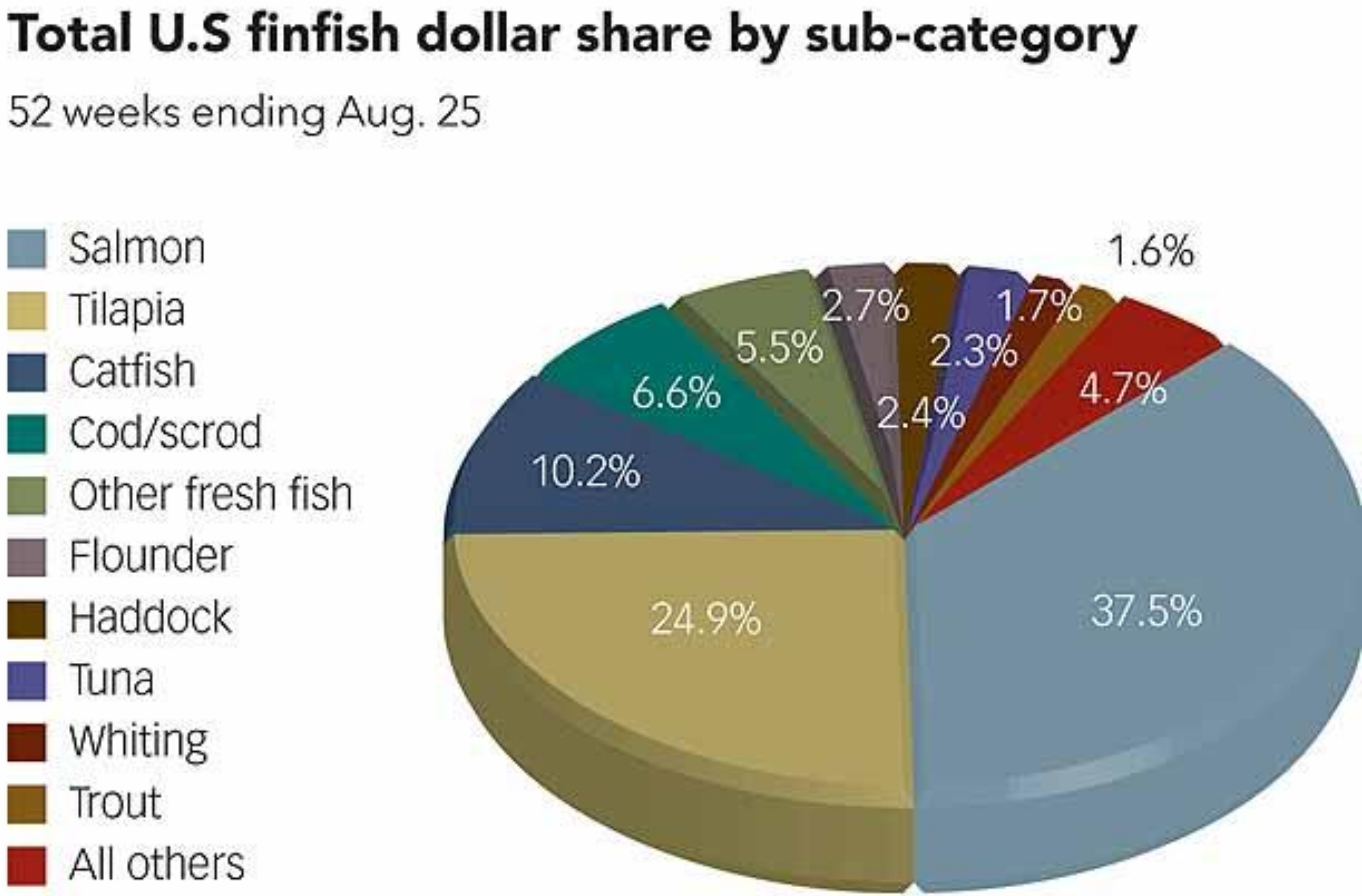
US Consumption of tilapia from domestic and imported sources



Imports from over 20 countries

- US is largest single consumer of tilapia products, with China a close second.
- US purchases great diversity of product forms (whole frozen, frozen and fresh fillets, sashimi, smoked, breaded and other value added forms)
- Popular with restaurants, grocery stores, food service and increasingly fast food.

Percentage of US finfish grocery sales: weekly sales averaged $608 per store



Farmed Mexican tilapia fillets in Tucson, Arizona Safeway

$15/kg


SUNFLOWER
FLORENTINE TILAPIA
SUNFLOWER
MESQUITE TILAPIA
LIME CILANTRO
TILAPIA FILLET
Net Wt. 6 OZ. (170g)


ASIAN SPICE
TILAPIA
TILAPIA
TILAPIA
TILAPIA FILLETS


Skillet Crisp
Crisp & Delicious From Your Skillet!
Skillet Crisp
Crisp & Delicious From Your Skillet!
Authentic Asia
Shrimp Wonton Soup
Club Price!
7.99
Buy 1 Get One
FREE
Of Equal or Lesser Value
BOGO GORTONS
Club Price!
2.99
Club Price!
2/4.00
Van de Kamp's
NEW
PARCHMENT BAKE
BAKES MOIST AND FLAKY IN PARCHMENT BAG
LEMON PEPPER TILAPIA
GORTON'S
GRILLED Tilapia
SIGNATURE GRILLED
GORTON'S
GRILLED Tilapi
Club Price!
6.99
Club Price!
3.99
ea
Club Price!
4.99
Buy 1 Get One
FREE
Club Price!
4.99
Buy 1 Get One
FREE
BOGO GORTONS


It's
Tomato & Herbs
Marinated
Tilapia
NEW WT.
10.5 oz (298 g)

US Tilapia consumption (imports and domestic)

465,953 mt of live weight (equivalent – 2009)

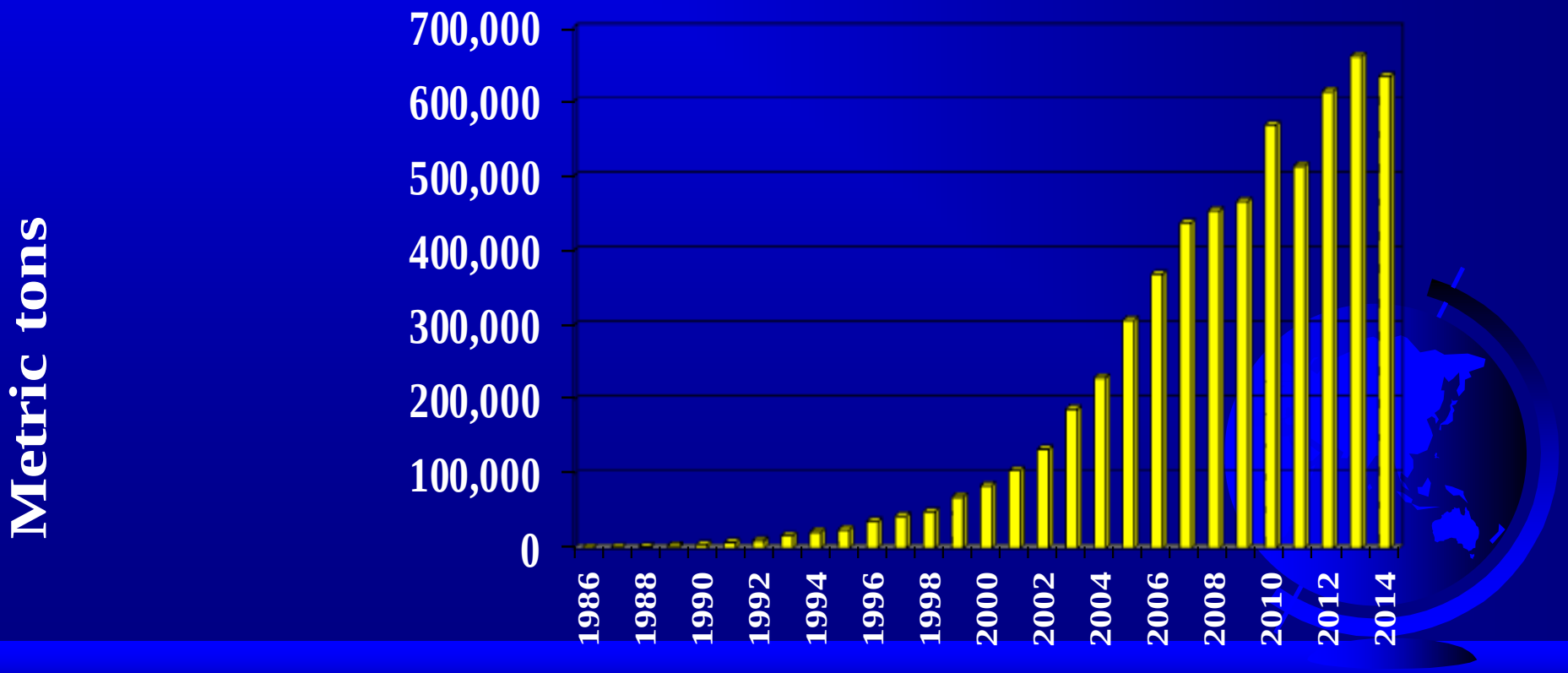
579,443 mt of live weight (equivalent – 2010)

513,361 mt of live weight (equivalent – 2011)

613,406 mt of live weight (equivalent – 2012)

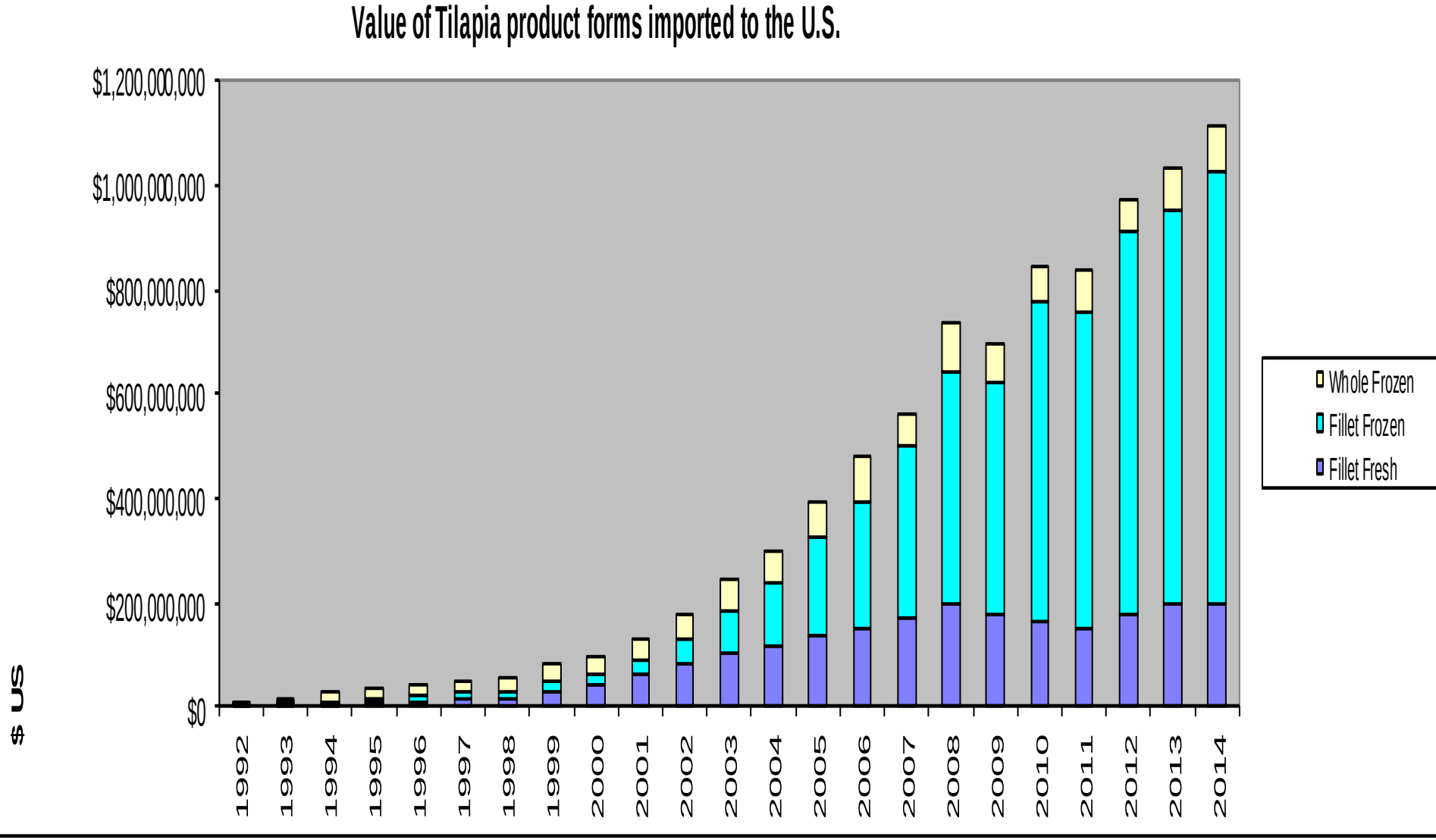
660,762 mt of live weight (equivalent – 2013)

633,759 mt of live weight equivalent – 2014)



$842,866,006(2010), $838,349,634(2011), **$986,127,852 (2012), $1,034,501,000 (2013)**

$1,114,646,000 (2014)

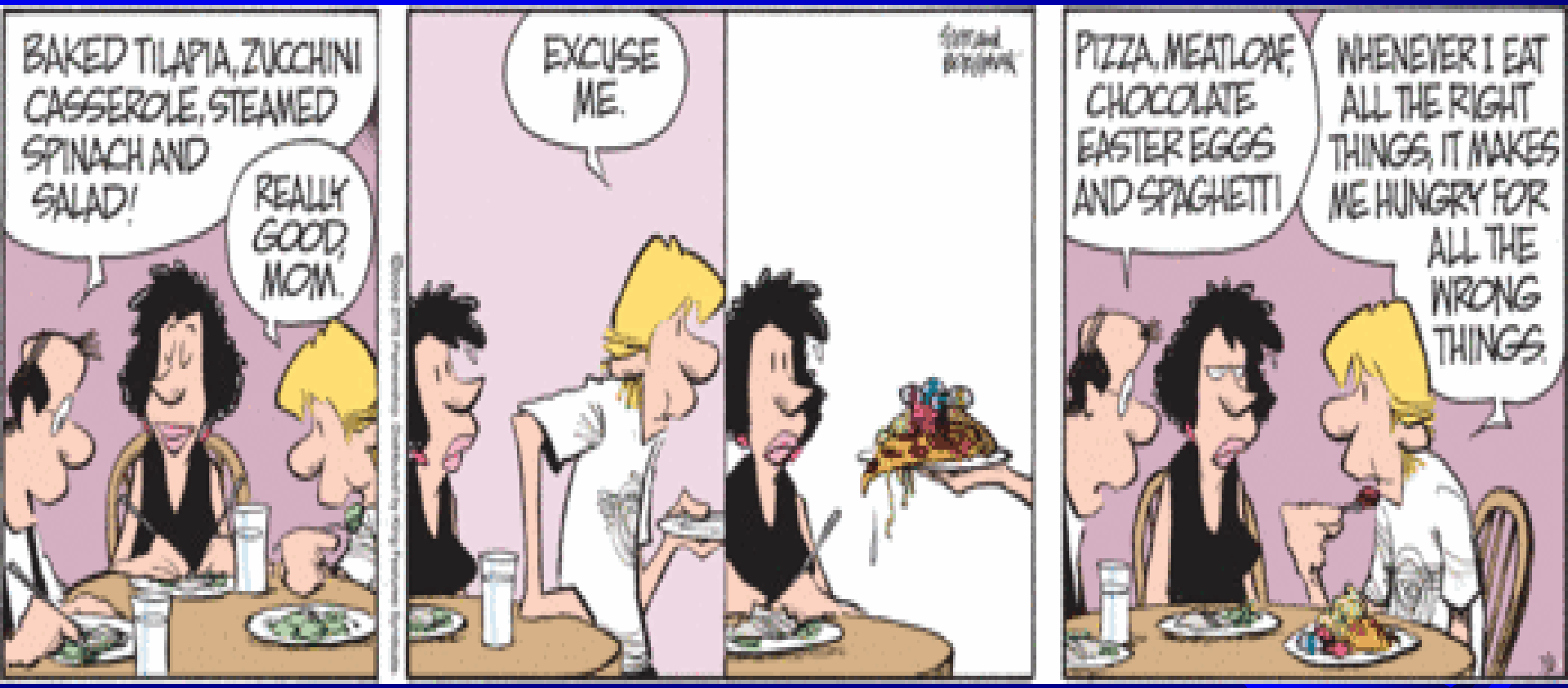


US Sales of tilapia

- Imports to US in 2014 were **$1,114,646,000**
- US production of about 30,000,000 lbs at farm
- 2014 US tilapia farm-gate sales were about **$90,000,000**
- 2014 US Tilapia Sales estimate –
- **$1,114,646,000** + $90,000,000 =

$ 1,204,646,000

Tilapia entering the mainstream as a healthy food item

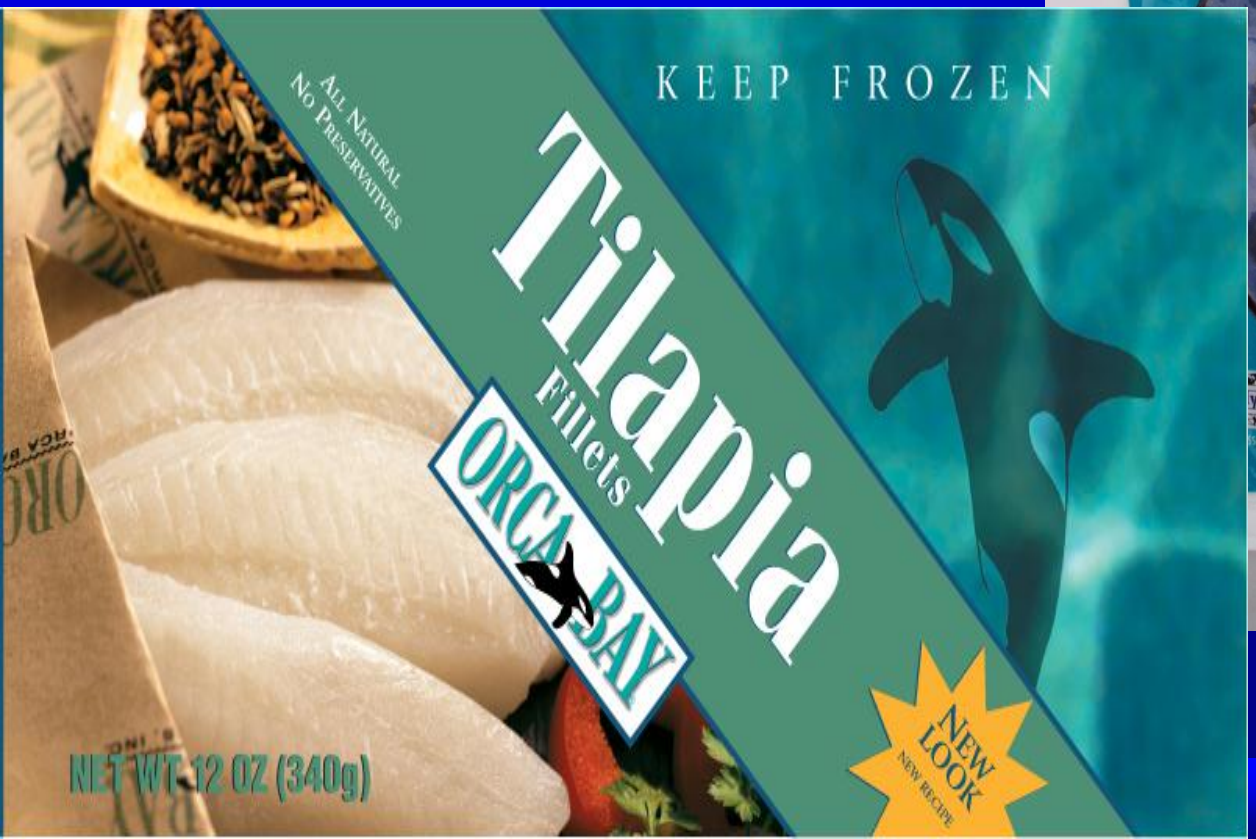


Celebrity endorsements

- **President-elect Obama** said new White House Chef will need to be able to prepare tacos and **tilapia.**
- **Michelle Obama fancies grilled tilapia**. “She enjoys her food but **tries to eat healthy**, as well,” said close family friend Sandy Matthews.
- **Michelle Obama** usually **opted** for jerk chicken Caesar salad or the **pineapple tilapia.**

Advertising

IQF Fillets in re-sealable packages




RESEALABLE
High Liner
MILD TASTING
Tilapia Loins
Lean-cut,
individually vacuum packed
SERVING SUGGESTION
ENLARGED TO SHOW TEXTURE
MICROWAVEABLE
• NO Additives
• NO Preservatives
• NO Carbohydrates
NET WT. 40 oz (2.5 lb.) 1.13 kg


High Liner
MILD TASTING
Tilapia Loins
Lean-cut,
individually vacuum packed
MICROWAVEABLE
COOKING INSTRUCTIONS
CAPTAIN'S FAVORITE RECIPE
Nutrition Facts
about TILAPIA
Superior Quality & Taste!
INGREDIENTS: TILAPIA


Nutrition Facts
Serving Size 4 oz (113 g, about 3/4 – 1 fillet)
Servings Per Container Varied (6–10)
Calories 110
Calories From Fat 15
Total Fat 2g 3%
Saturated Fat 1g 5%
Trans Fat 0g
Cholesterol 25mg 9%
Sodium 25mg 1%
Total Carbohydrate 0g 0%
Dietary Fiber less than 0g 0%
Sugars 0g
Protein 23g
Vitamin A 0% • Vitamin C 0%
Calcium 4% • Iron 6%
This bag is packed by net weight, not by count. The product in this package is made from tilapia loins of varying sizes. The package may contain anywhere from 6 to 10 individual tilapia loins. Fewer loins in the bag do not mean less weight in the package.
INGREDIENTS: TILAPIA
Distributed by
High Liner Foods (USA), Inc.
Portsmouth, NH 03802-0819
www.highlinerfoods.com
PRODUCT OF INDONESIA
FARM RAISED TILAPIA


Ready to cook gourmet seafood
Sea Cuisine™
Natural Cut Crusted Fillets
TORTILLA CRUSTED TILAPIA
with Chipotle & Lime
NET WT. 2 LB (907g)
KEEP FROZEN
SERVING SUGGESTION


TRUSTED SINCE 1849
GORTON'S
NEW!
Premium Fillets
Tilapia
CRUNCHY BREADED FISH FILLETS
GORTON'S FIVE STAR TILAPIA
Serving Suggestion
KEEP FROZEN
NET WT 17.2 OZ. (488 g)


Oven Poppers
From Our Kitchens To Your Home
Tilapia
Stuffed with Sun Dried Tomato, Shrimp & Lobster
Carbs 8g Protein 19g
2 5 oz. servings of hand-selected stuffed fish fillets
Premium Choice ENTRÉE
NET WT. 10 OZ. (284g) • KEEP FROZEN • LESS THAN 200 CALORIES PER SERVING


High Liner
SEAFOOD SELECTS™
PRIMAVERA TILAPIA
Tilapia and spring vegetables in a garlic butter sauce
ALL NATURAL INGREDIENTS
NET WT 32 oz (2 lbs) 907 g

Restaurants trying many recipes

Tilapia in Long John Silver's

McDonald's and other fastfoods could double tilapia global demand

New product forms

Smoked tilapia

Sashimi grade tilapia

Tilapia Orange Juice

Mexican-American street foods

Courtesy:
Randall Brummett

Byproducts - Tilapia Leather

Manolos, Now Available In Tilapia

January 20, 2012 4:35 pm

Manolos made from discarded tilapia skin, raffia, and cork? Why not. Until now, the shoemaker hadn't delved into the green scene, but eco-chic designer Marcia Patmos was able to change that. "They were very open and loved my suggestion of bringing sustainability into the shoes, as long as I could find the right materials that they couldn't supply," Patmos tells Style.com. So, she settled on natural resources and fish industry byproducts for the Spring '12 collection. "The materials were actually very easy to work with," Patmos adds. "Mixed together or dyed, they're very versatile." The heels ($975) and the flats ($645) are hitting Manolo stores next week. Patmos revealed she's already hard at work on the next round—an ankle bootie made of vegetable tanned leather—for the the Fall '12 Manolo Blahnik for M.Patmos collection.

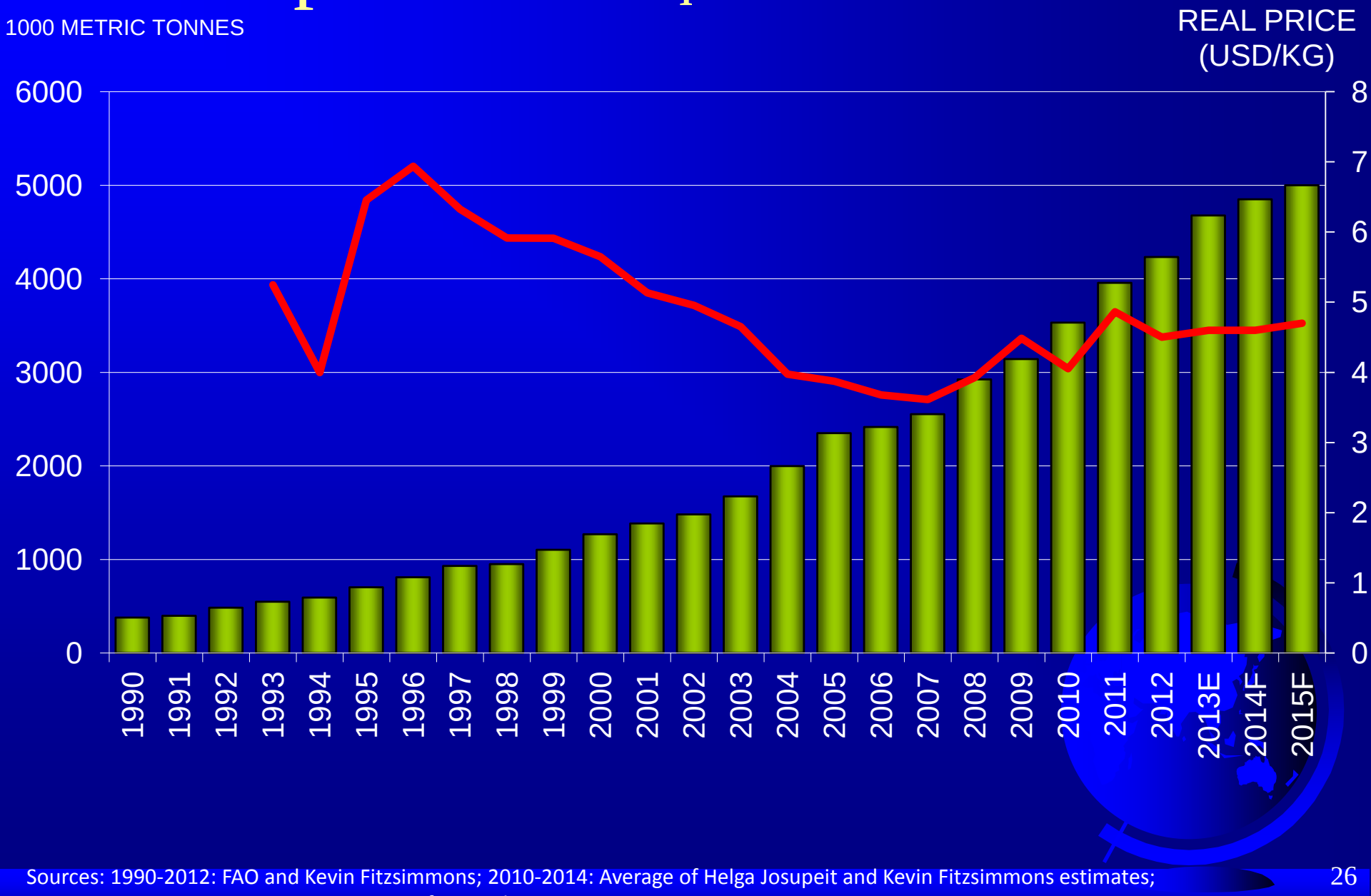
—Kristin Studeman

Pet treats


VITAKITTY
TILAPIA


Natural
VITALITY
Helps Maintain Eyes, Skin & Coat
TILAPIA
With Flaxseed & Vitamins

Tilapia Global Aquaculture Production



Sources: 1990-2012: FAO and Kevin Fitzsimmons; 2010-2014: Average of Helga Josupeit and Kevin Fitzsimmons estimates; 2014: Kevin Fitzsimmons; Prices US import frozen tilapia Jan- Nov: NMFS

Conclusions

- US tilapia consumption was 633,759 mt of live weight equivalent in 2014, should exceed **680,000 MT in 2015**. (8% growth)
- More value adding processing in producing countries as they have many of the side ingredients and desire to capture more profit from value addition.
- Tilapia consumption is still only two fish per capita per year. Lots of opportunity to replace one burger or one chicken dish per year.


Buy TILAPIA
4RUNNER
SR5
ARIZONA
TILAPIA
GRAND CANYON STATE
Thank you
Questions?