

Asia: Tilapia for Food Security and Exports



TILAPIA 2015

Kuala Lumpur, Malaysia

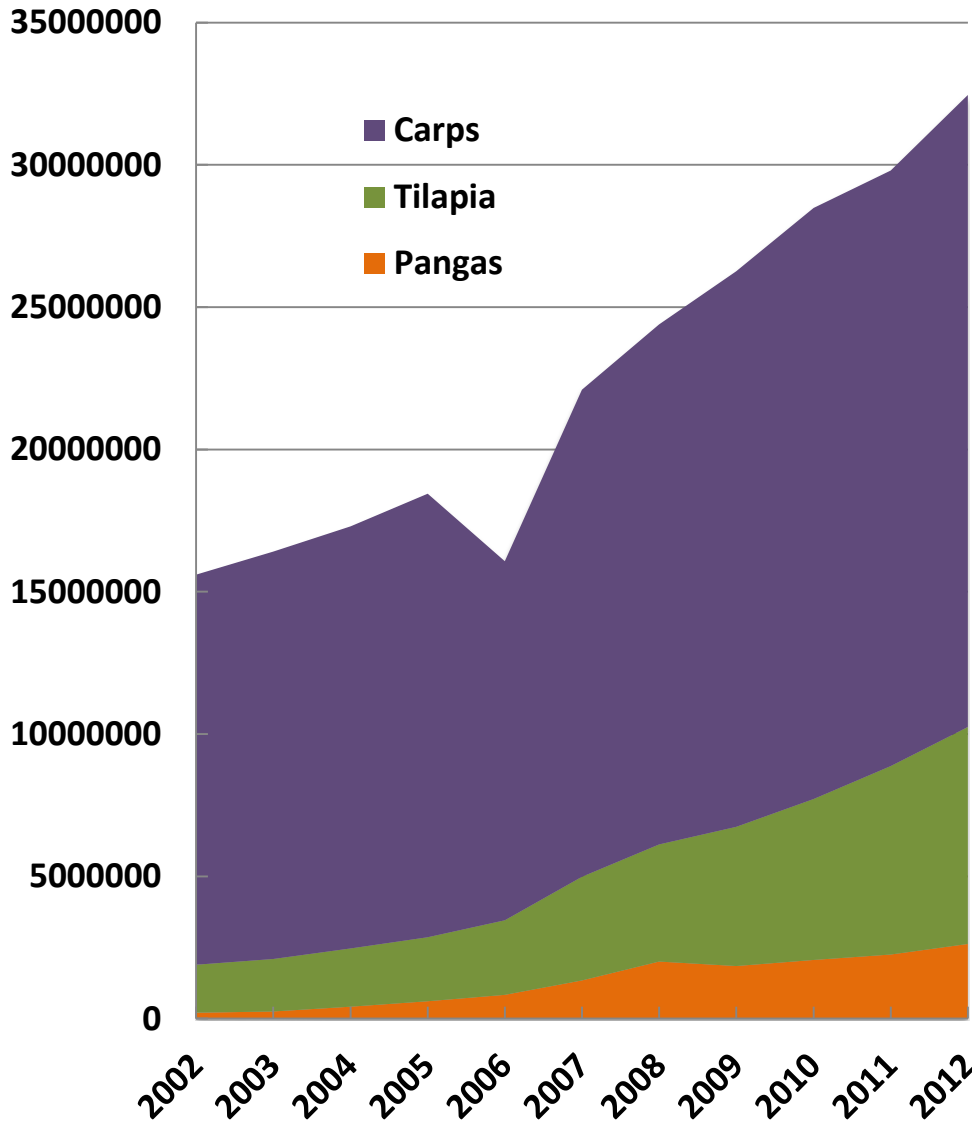
Shirlene Maria Anthonysamy

INFOFISH

Quick Recap – Global Fishery Trade

- In recent times, the global seafood trade and markets have taken to the new directions.
- Development is very much linked with growth in aquaculture - freshwater fish ...carps, tilapia and catfish.
- Demand for food fish: steady growth in the new and emerging markets, while in traditional developed markets: the growth rates have slowed down.
- Japan – largest seafood market, declining trends
- Other markets particularly in East Asia have emerged as lucrative, even to seafood exporters in Europe and North America.
- China is obviously the largest and fastest growing among them.
- Import demand is also rising in many medium and small scale markets including India.
- *Although fishery industries in Asia remain export oriented, fish and seafood previously used for export processing are increasingly channeled to domestic consumers who pay higher prices compared to traditional export markets*

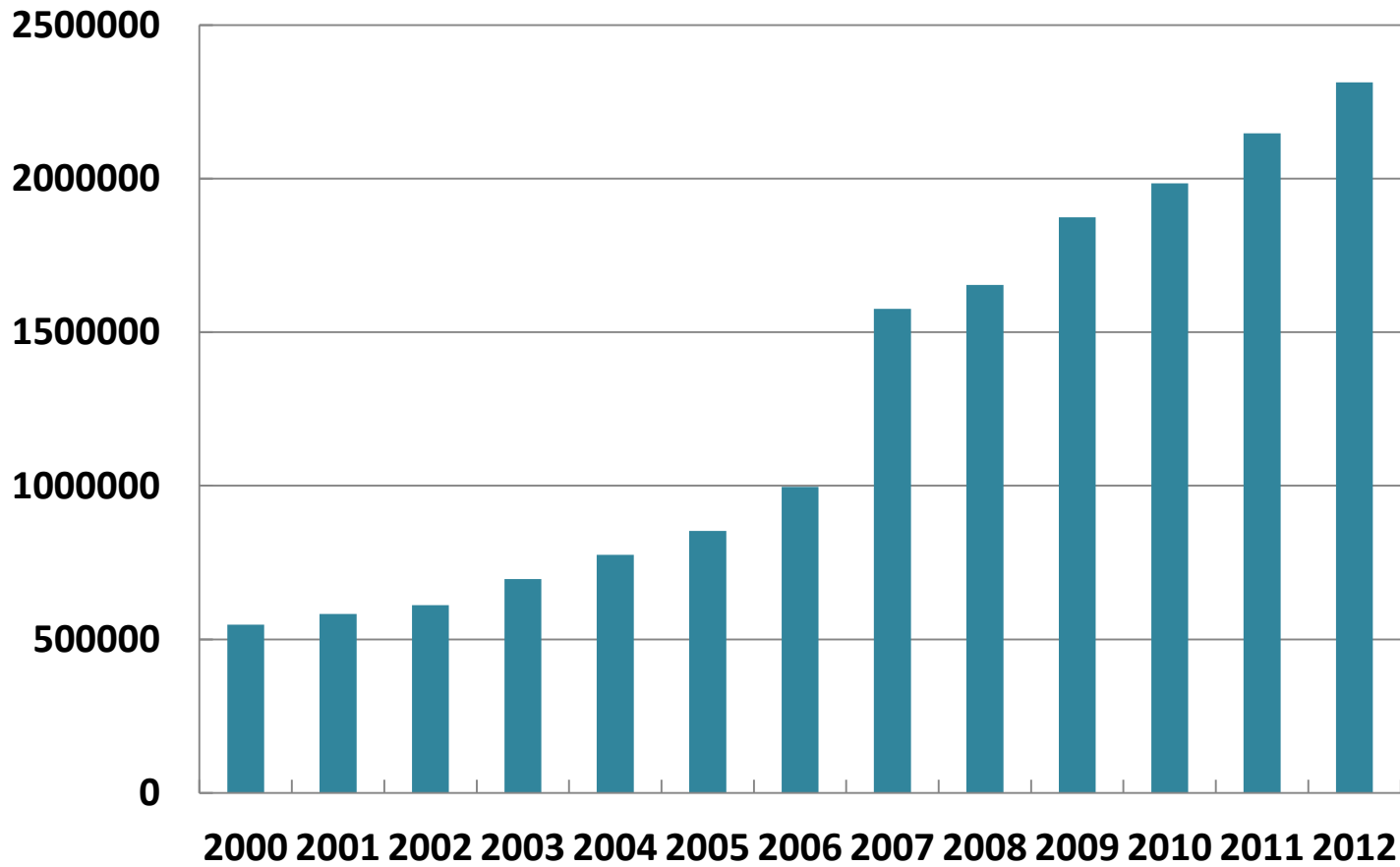
Global Production: Major Freshwater Species



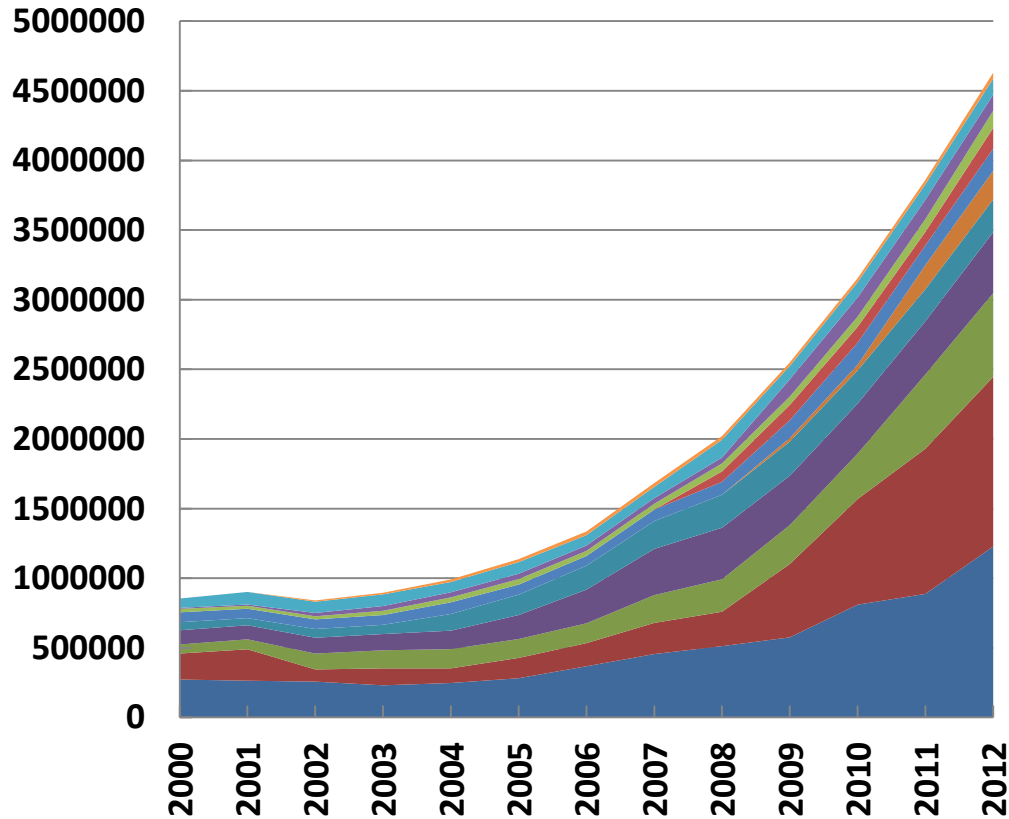
- Carps – plays an important role in food security in China and India
- We see that slowly taking shape for the other major freshwater species – tilapia and pangasius
- Demand has been growing worldwide
- Imports growing both in developed and developing countries including in India

Tilapia farming continues to expand in Asia

China supplied more than half of farmed tilapia



Other Asia.....



- Seven of top ten producers are from Asia
- Supplies increased significantly supporting national food security programme
- Egypt, the 2nd largest producer is also importing a fair share of tilapia to fill supply gaps



ASIAN SUPPLIES DOMINATE THE GLOBAL TILAPIA TRADE

- Being the largest producing country in tilapia, global export trade is dominated by China.
- The trend is similar in the other producing countries in Asia, where domestic markets absorb most of the supplies.
- Exports have increased from Indonesia, Thailand in Southeast Asia and some others countries in South Asia
- There is also a drive to add value in exports through aquaculture certification such as ASC/Global Gap (Indonesia, Vietnam and Taiwan)



China – the largest producer, exporter, market

- Production has crossed 1 million MT
- Domestic market takes two third of local production
- Exports continue to grow, some change in direction
- More and more production is now fulfilling domestic demand
- Whole frozen tilapia exports have picked up in response to increasing demand from African markets

	2014		2013		2012		2011		2010	
	Q	V	Q	V	Q	V	Q	V	Q	V
Frozen, whole	139.0	310.9	134.6	285.6	111.1	203.3	107.6	202.4	75.7	125.9
Frozen, fillets	170.3	778.5	182.1	793.2	179.2	702.0	158.1	663.9	186.5	688.5
Prepared	92.5	424.2	85.8	368.6	69.8	253.5	63.3	240.3	59.5	189.8
TOTAL	402.0	1 513.6	402.5	1 447.4	360.1	1 158.8	329.0	1 106.6	321.7	1 004.2

Source: China Customs.

Indonesia

- Tilapia exports increased
- Prices offered for products from Indonesia are higher – due to premium quality
- Regal Springs...the first to acquire ASC certification
- Looking at the market potential, other countries are also moving towards such products

Aromatic Fish Soup (Indonesian) Gule kepala kakap

Posted on August 16, 2013
by Magdalena

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If you have bought a whole fish, and have a left-over fish head & backbone, you can make a spectacular meal of the remains, by cooking up this aromatic fish soup. It is a very popular dish in Indonesia — a country that knows how to make the most of its abundant herbs and spices.

You will need:



Taiwan- Exports High Quality Tilapia

- Once the world's largest tilapia exporter
- Exports are on the rise again and frozen tilapia is making way into new markets. The Fisheries Agency is actively promoting local production particular as high-quality tilapia
- Whole frozen tilapia which makes up 86% of total tilapia exports were supplied more to Saudi Arabia, Kuwait, Bahrain and Qatar among Middle Eastern countries
- Exports of *sashimi* quality fillet takes place to Japan with average prices of US\$ 11.00/kg
- Japan imports an average of 1500 MT of tilapia fillet from Taiwan and Indonesia



Philippines

- Most of production is absorbed by the domestic market..
- Exports have picked up since 2012
- USA and Japan
- Prices offered are high @ US\$ 11.00/kg

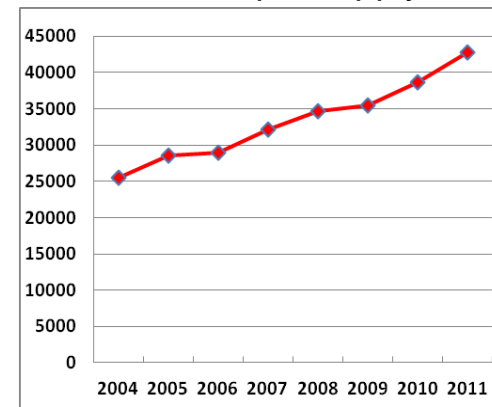
	2010	2011	2012	2013
Whole	230	317	153	78
Fillet	0	0	2044	6176
Total	230	317	2197	6254

Growing domestic tilapia trade in Asia

- After carps, tilapia - possibly the next dominant aquaculture species contributing significantly in the region's national food security programme
- From China to Bangladesh in the South, TILAPIA gets growing consumer recognition in the producing and non-producing Asian markets
- **Fish is traded live, fresh and frozen and live tilapia generally fetches higher price**
- In Southeast Asia, tilapia is considered a higher value fish in the live food fish trade
- In Malaysia and Singapore, the “**cherry**” tilapia replaced wild-caught red snapper in seafood restaurants during the 1997 economic recession
- Live tilapia is also gaining popularity in supermarket trade

Malaysia

Total tilapia supply

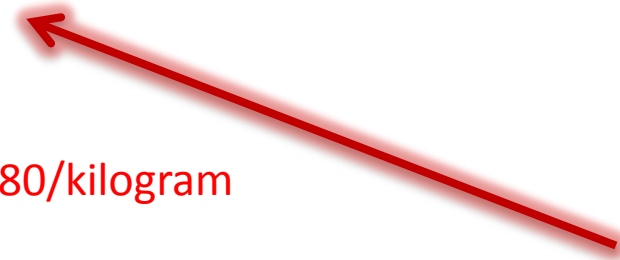


- Production is for domestic market and some exports
- Live tilapia mostly go to Singapore
- Demand also increased from Thailand, Indonesia, Philippines and Brunei.
- Domestic demand and market price for live and fresh tilapia increased significantly.
- Live tilapia which used to be available only in seafood restaurants is now sold in supermarkets and hypermarkets in tanks at a premium price.
- Prices increase during the Chinese Lunar New Year
- Interestingly some seafood restaurants are also promoting it as “Norway fish”.
- Supply increased over the past decade and per capita consumption – from 1.08 kg in 2004 to 1.49 kg in 2011.
-

Live tilapia fetches the highest price in East Asian markets ...



There is a premium price for fresh TILAPIA fillet



US\$ 12.80/kilogram



Higher Price for 'Red tilapia' in Thai supermarkets !



US\$ 1.46/pc



US\$ 2.10/pc

Chinese New Year Promotion Hampers with Tilapia

During reunion dinners at home, in restaurants or hotels

In seafood restaurants, live tilapia was priced at US\$ 15-19/kg

RM338
Package (A)

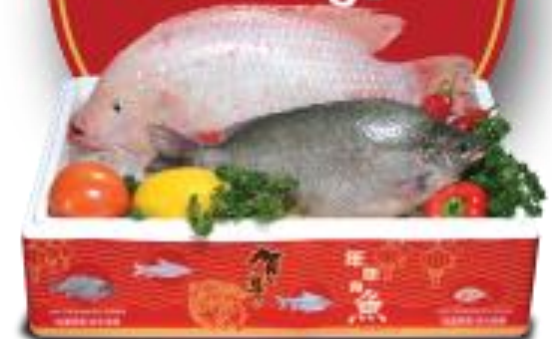


RM268
Package (A)



Hampers range from
US\$ 35-100

RM118
Package



Ready to eat – TILAPIA



Tilapia in Thailand and Malaysia

Whole grilled tilapia



60 Baht per fish (US\$ 1.90)

Tilapia satay



RM 0.80/stick (US\$ 0.20)

Philippines – A good example of product diversification




Tilapia Crepe



RED HOT TILAPIA



Tilapia Meatballs



Dana G. Michelle Celeste

INDIA



- Production of tilapia is increasing in India after the government approved responsible aquaculture of tilapia in the country.
- Exports of whole frozen tilapia increased from 1133 tonnes during January-September 2013 to 7738 tonnes in the same period in 2014, national statistics sources report.
- Mainly to Africa and the Middle East.
- This is the world's second largest producer of freshwater fish is importing close to 4000 MT of basa
- Urban catering trade is the main outlet for these products.
- Demand for fw fish is also growing in a landlocked country like Nepal.
- **Indian tilapia fillet can easily cater to this market segment**

Growing markets for frozen tilapia in the Middle East



Positive trends

- Fishery imports in the Middle East markets have crossed US\$ 1 billion and it is increasing every year
- Tilapia imports have increased
- Israel is the largest market – 65% share followed by UAE, Saudi Arabia, Jordan, Egypt and Kuwait
- China is the leading supplier
- India and Vietnam are also increasing exports to this region
- Largely supported by the catering industry

Middle East tilapia imports from China

	2010	2011	2012	2013	2014
Total	11433	15198	16769	17267	Approx. 190007

Asia also imports

- Rather small as most of the local production enters the domestic markets
- Hong Kong was the largest importer among Asian countries with a total of 2 514 tonnes of frozen tilapia (whole and fillet).
- In Japan - mainly constituted *izumidai* quality (*sashimi*) tilapia which is supplied by Taiwan.
- There are also imports into Japan from the Philippines which mostly directed for the Filipino community in Japan.
- Lately frozen tilapia imports - into new markets namely Iran, Ukraine and Kazakhstan.
- In Iran, the market used to be dominated by frozen hoki fillets from New Zealand.



So...in closing

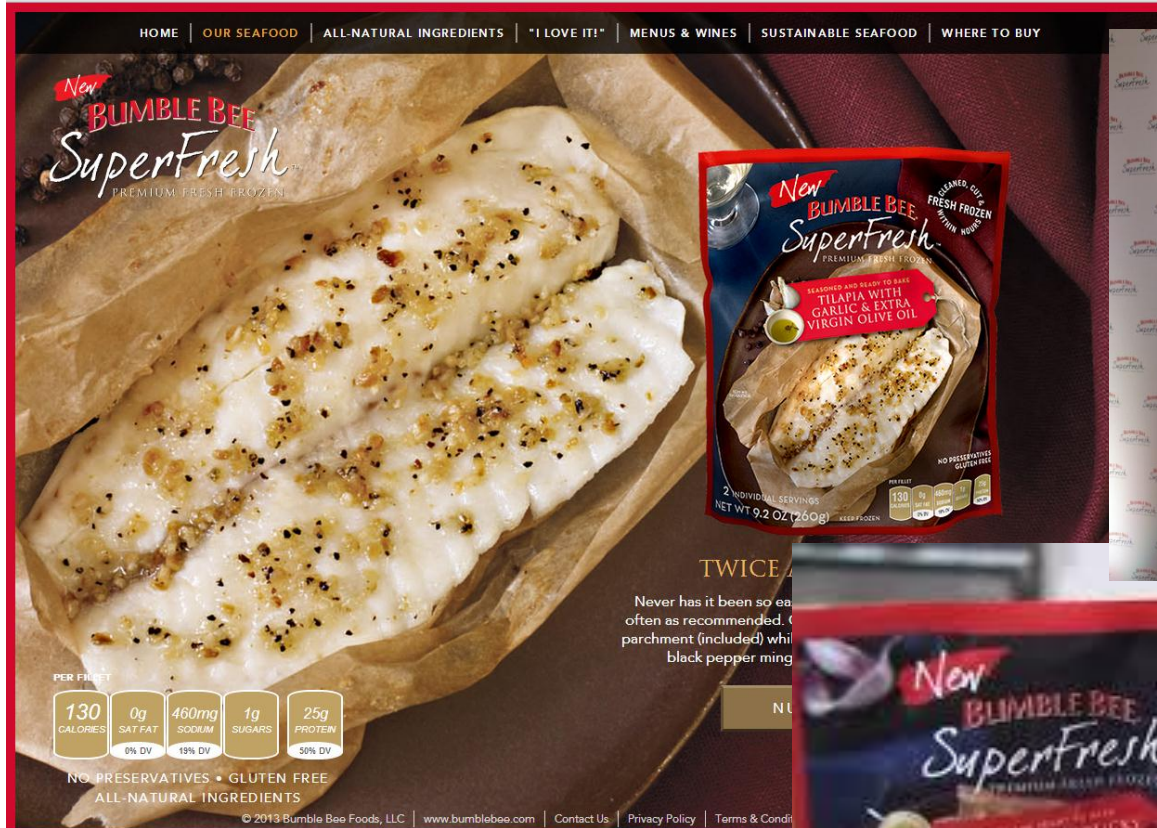
- Tilapia is clearly is a potential – its affordable, the demand is good
- But...we have got to to stay one step ahead at all times to respond to consumers ‘ changing needs and the market direction (all about looking out for opportunities/potentials)
- With a population of nearly 4 billion, where 28% of the world’s middle class population, Asia is increasingly dominating global fishery supply as well as demand
- Not really all about targeting international markets
-there are good business opportunities even in our immediate neighbours let alone our home grounds...when the target group is easier to tap

Norwegians have been successful...with consistent active approach



One of the big three canned tuna companies in the US – diversifies to Tilapia

HOME | OUR SEAFOOD | ALL-NATURAL INGREDIENTS | "I LOVE IT!" | MENUS & WINES | SUSTAINABLE SEAFOOD | WHERE TO BUY



New
BLIMBLE BEE
SuperFresh
PREMIUM FRESH FROZEN

SEASONED AND READY TO EAT
TILAPIA WITH
GARLIC & EXTRA
VIRGIN OLIVE OIL

CLEANED, COOKED & FRESH FROZEN WITH NO BONES

NO PRESERVATIVES
GLUTEN FREE

2 INDIVIDUAL SERVINGS
NET WT 9.2 OZ (260g) KEEP FROZEN

PER FILLET

130 CALORIES	0g SAT FAT 0% DV	460mg SODIUM 19% DV	1g SUGARS	25g PROTEIN 50% DV
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NO PRESERVATIVES • GLUTEN FREE
ALL-NATURAL INGREDIENTS

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Leave you with this.....GOMES DA COSTA IS EXPERIMENTING ON CANNED TILAPIA

