



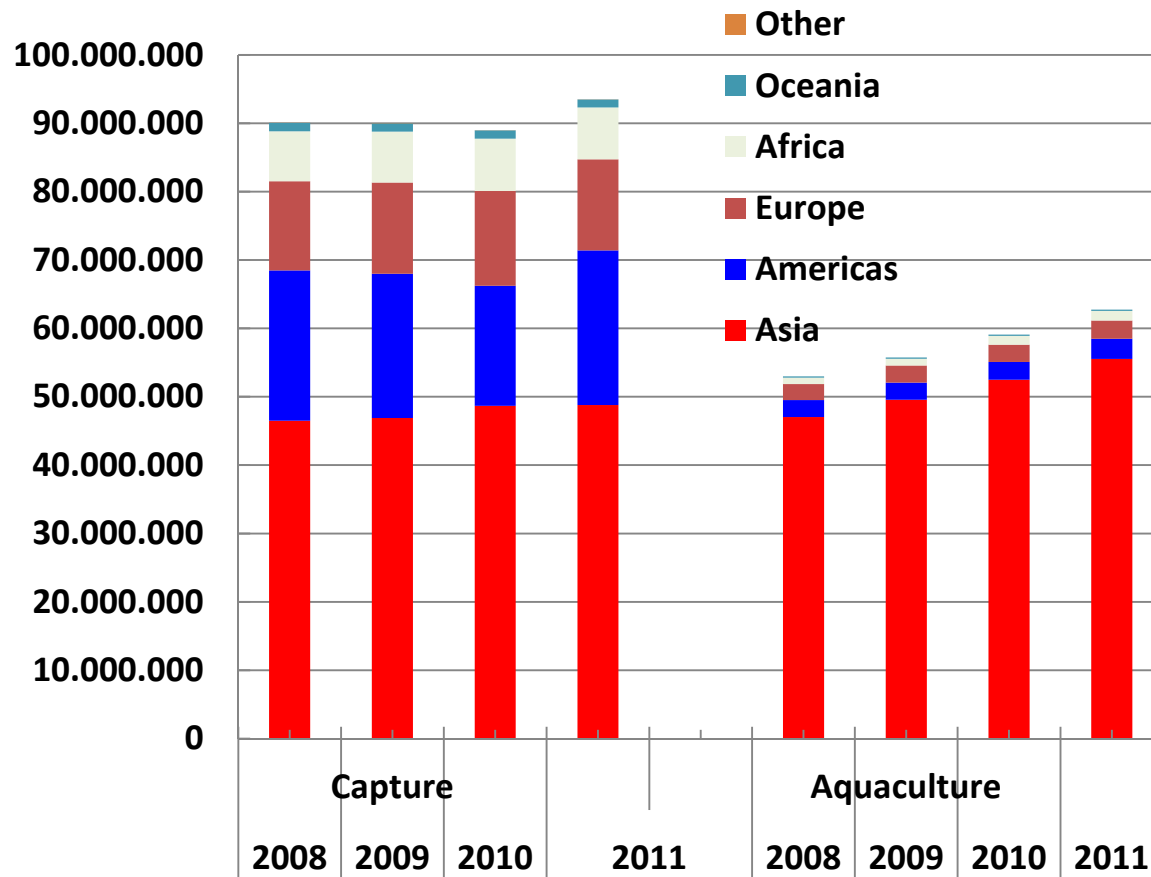
# ASIA: The main producing region, the main supplier and the main market



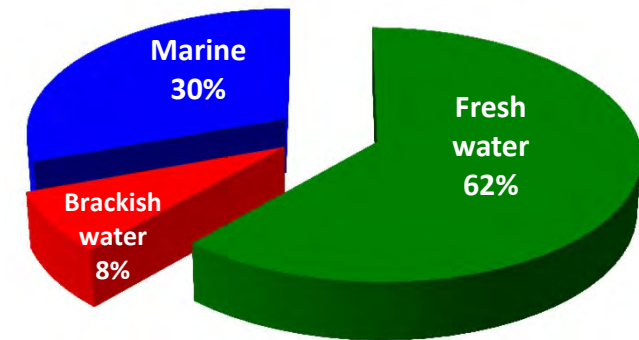
Fatima Ferdouse  
INFOFISH



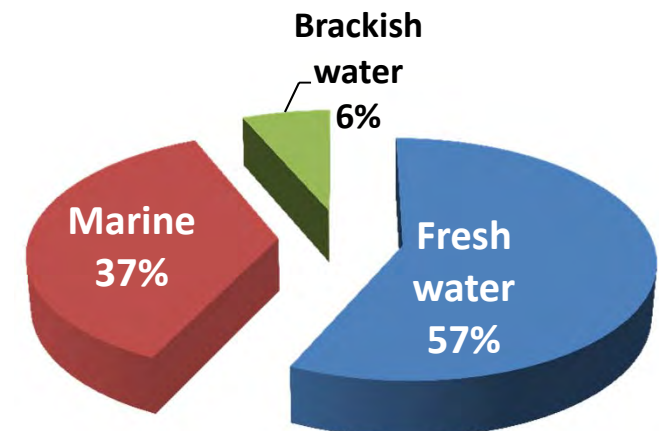
# GLOBAL FISHERY SUPPLY



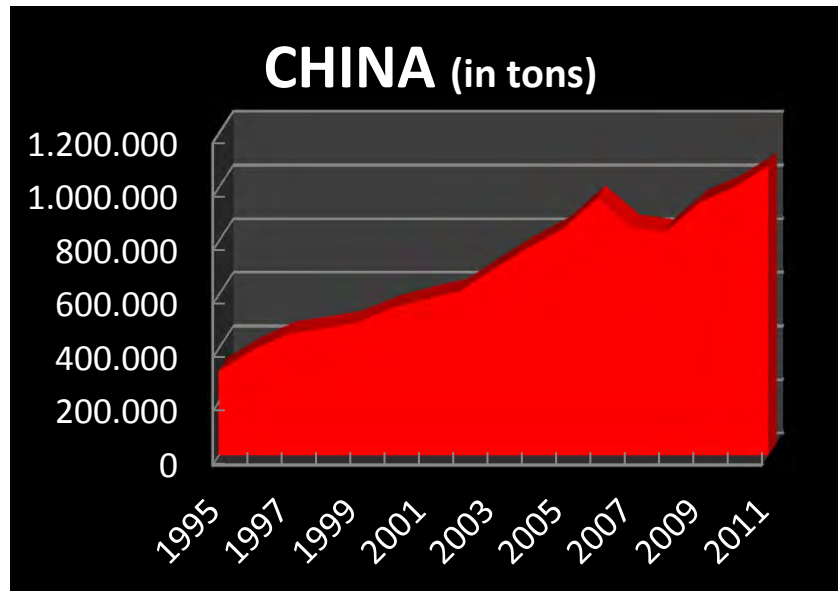
2011



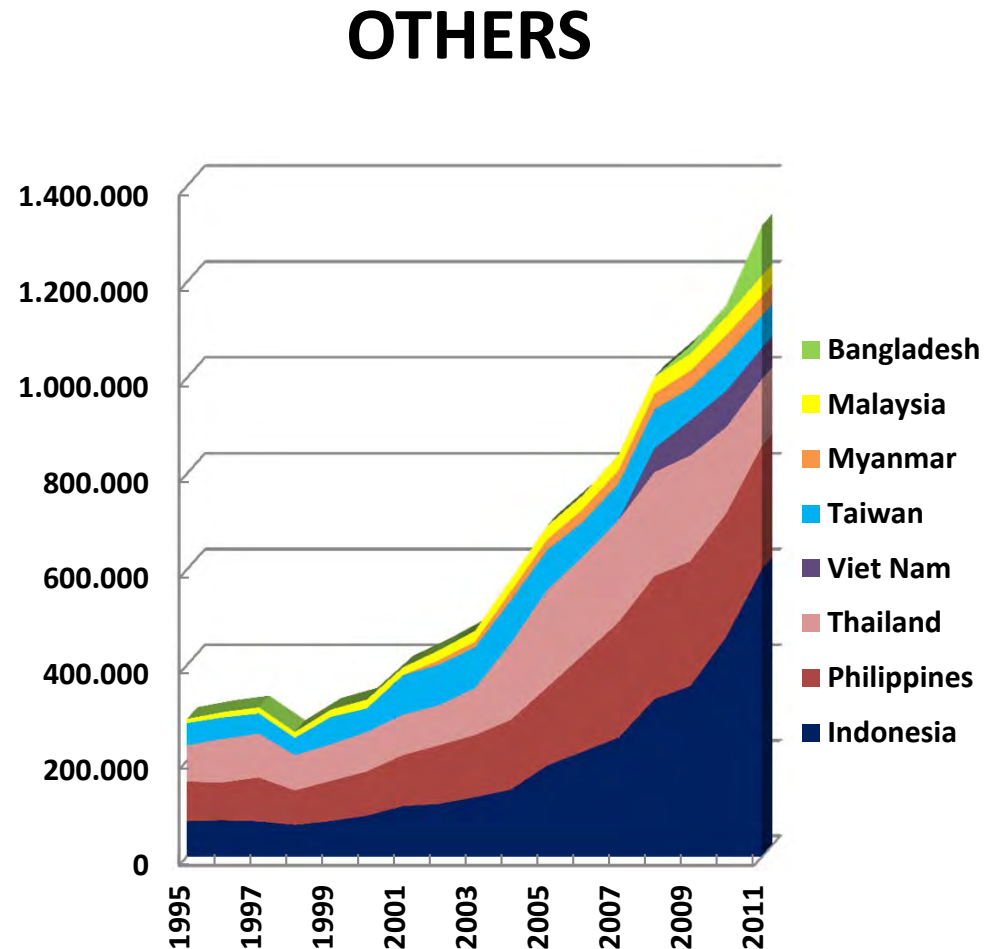
2000



# Tilapia farming continues to expand in Asia/Pacific



- China supplied nearly half of Asia's farmed tilapia production
- Production in the other Asian countries increases faster in support of local demand.
- Tilapia aquaculture is also introduced in PNG and Fiji in the Pacific





## Adding Value in Tilapia Farming !

- Poly culture of tilapia and freshwater prawn adds value in extensive aquaculture. It is practiced widely in Bangladesh and Myanmar
- Farmed tilapia production increased significantly in Asia in support of food national security
- India now officially allows tilapia farming in that country
- Through the adoption of alternative farming technique, Taiwan has moved to higher-value tilapia production

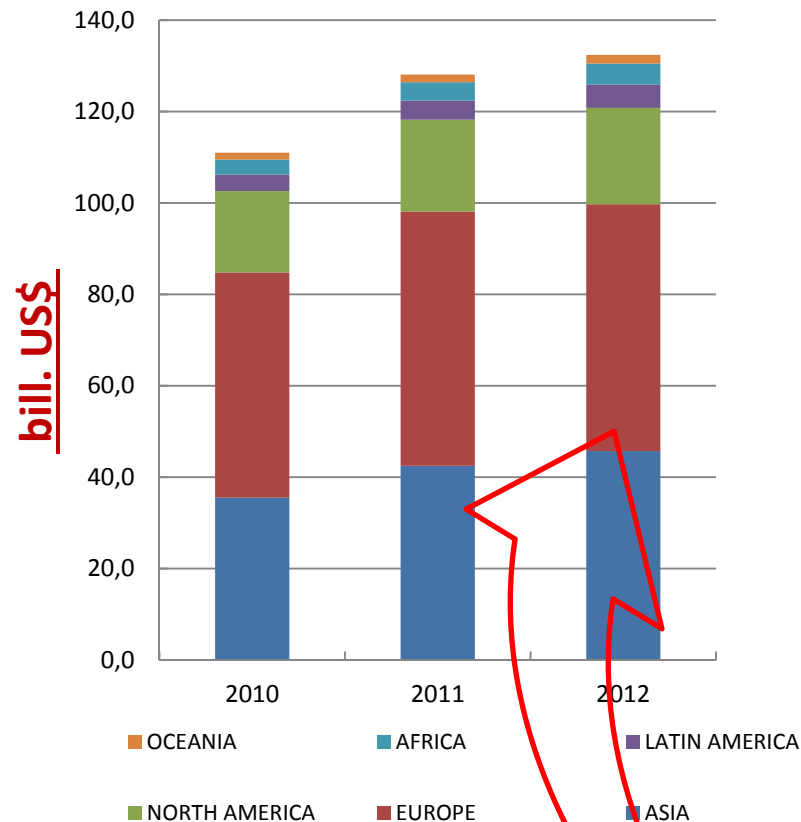


# Organic Poly-culture in Asia



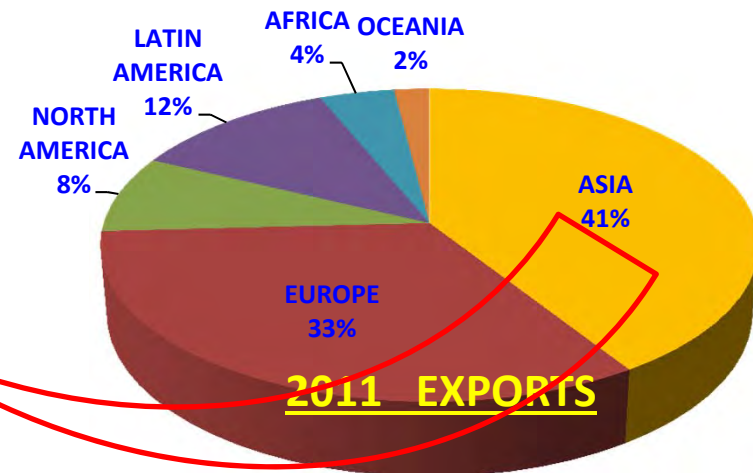


## TRADE: Global Fishery imports, by continent



### EXPORTS:

- Asian producers dominated supplies of food fish in the international market.
- The share of freshwater fish , particularly pangasius and TILAPIA increased in exports , compared with farmed shrimp



## TILAPIA TRADE: In global trade, Asian supplies dominate

- Being the largest producing country in tilapia, global export trade is dominated by China. However, the lion share of China's tilapia production is marketed locally.
- 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)

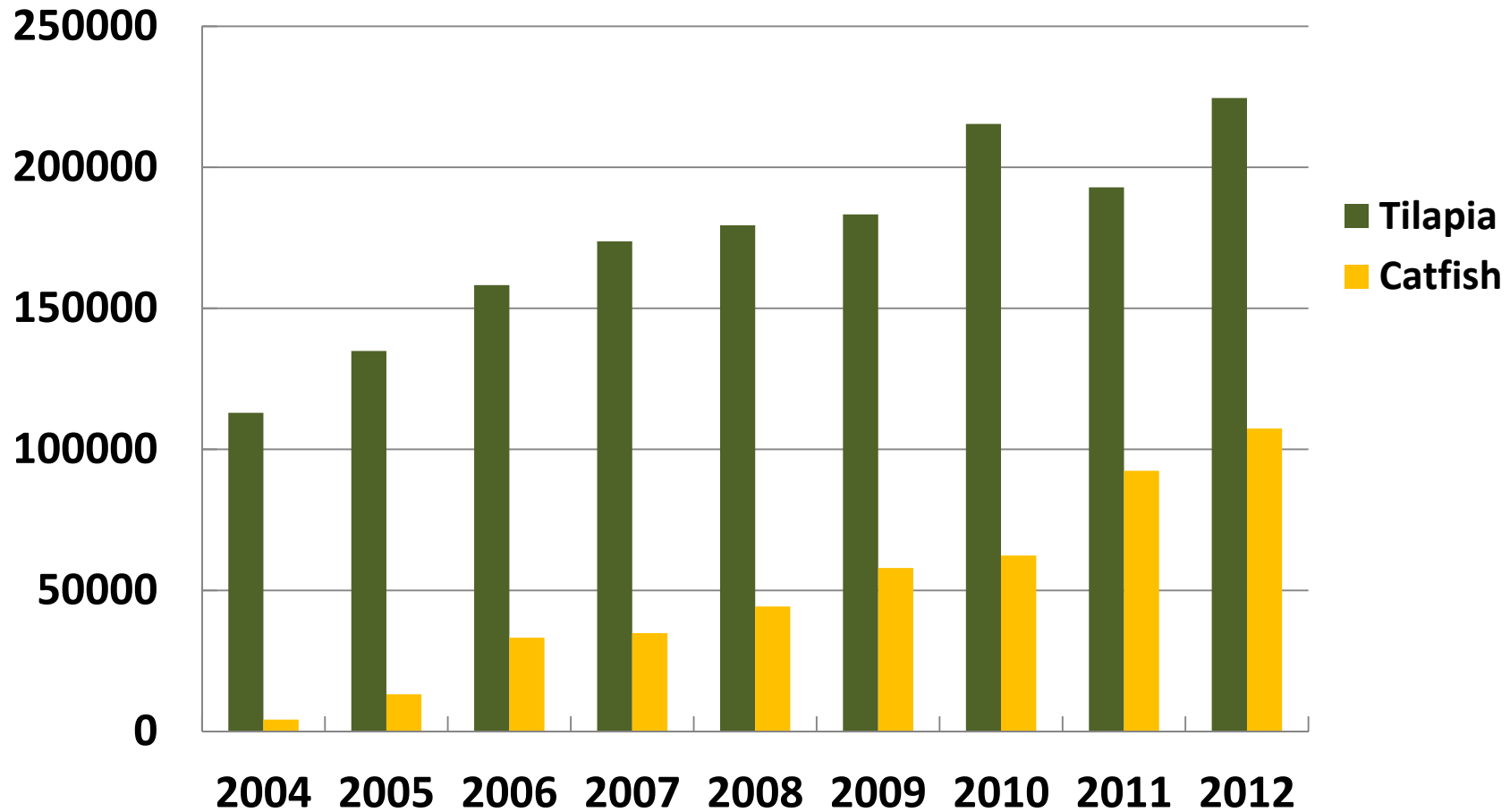


# **In Foreign Trade for Tilapia, Asia is the Main Exporting Region**

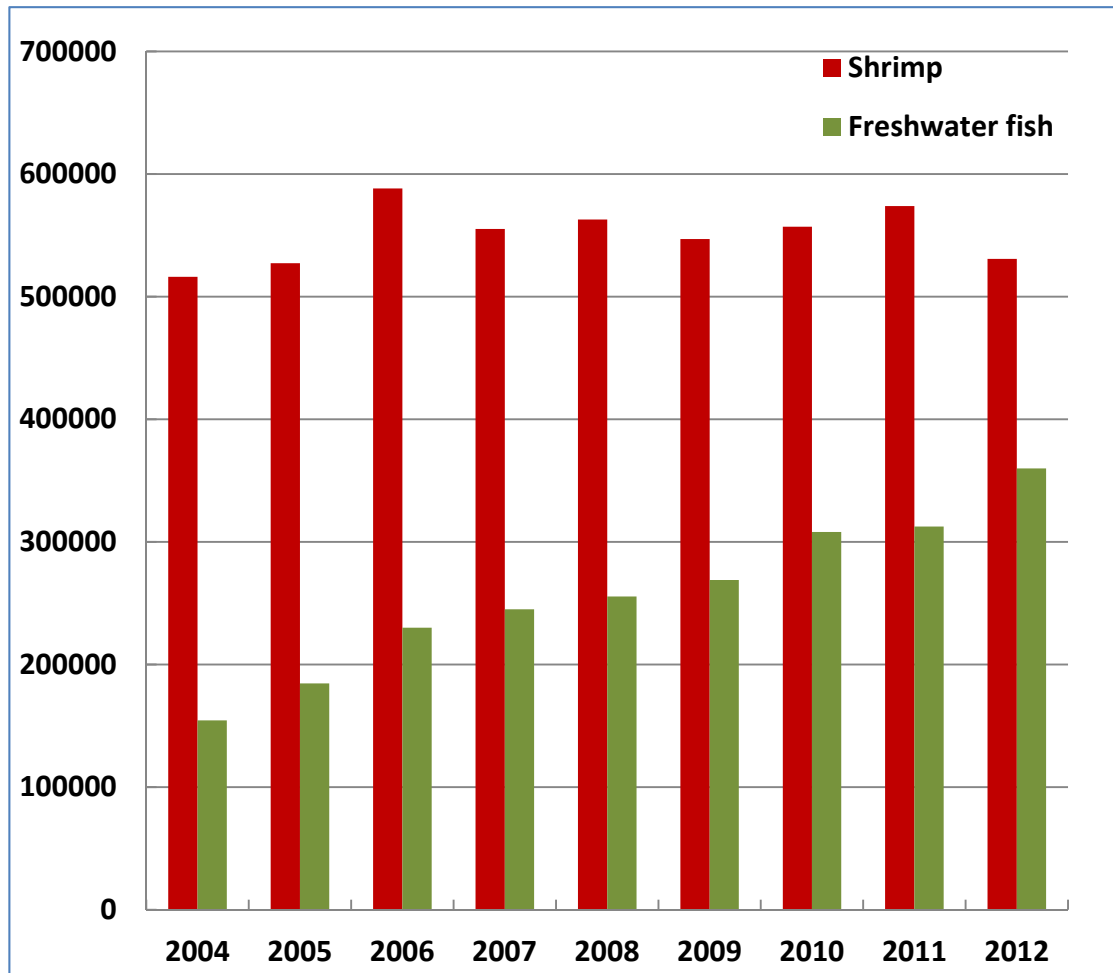




# USA is the largest import market for TILAPIA , particularly fillet



# US import trend for SHRIMP & TILAPIA



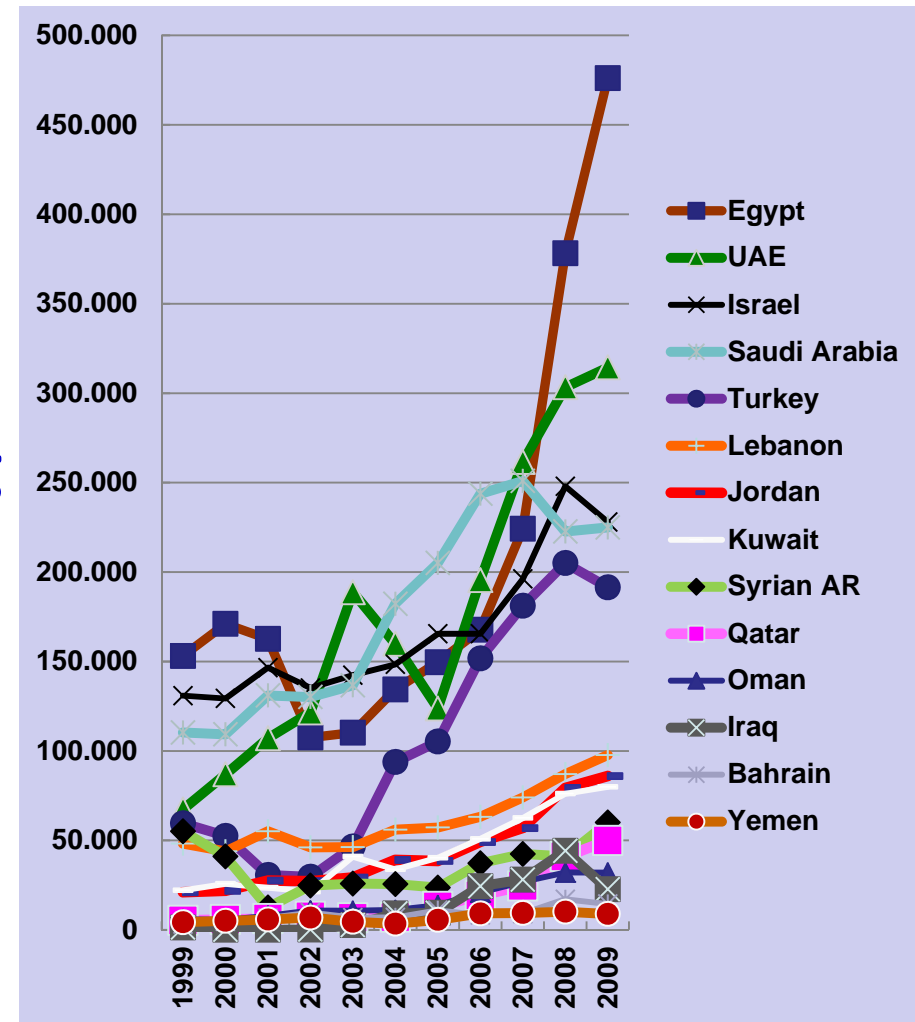
## **FOREIGN TRADE -----**

- **Frozen fillet exports also increased to European markets**
- **The other growing markets for frozen tilapia are Middle East and Africa.**



## Positive trends in the Middle East

- **Fishery imports in the Middle East markets have crossed US\$ 1 billion and it is increasing every year.**



<b>Tilapia Exports from China to African Markets</b>			
<b>Destination</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>Cote d’Voire</b>	6160	9829	16874
<b>Angola</b>	1554	6499	7967
<b>Ghana</b>	1843	3947	5003
<b>Congo</b>	1237	2753	3672
<b>Nigeria</b>	543	2074	7391
<b>Benin</b>	1367	2112	2025
<b>Namibia</b>	1473	3015	3369
<b>Gabon</b>	152	1790	3433
<b>S. Africa</b>	503	703	662
<b>Zambia</b>	1749	1493	3835
<b>Dominican Rep</b>	1370	660	1533
<b>Cameroon</b>	6817	14804	6653
<b>Togo</b>	472	1071	1422
<b>Equatorial Guinea</b>	910	1435	951
<b>Egypt</b>	4894	585	2057
<b>Sudan</b>		350	416
<b>Total</b>	<b>31044</b>	<b>53120</b>	<b>67263</b>

# Asian Tilapia Trade -----

- Fish is traded live, fresh and frozen
- Live tilapia generally fetches higher price
- Red tilapia is preferred and get better price than the grey tilapia



# Higher Price for 'Red tilapia' in supermarkets !



US\$ 1.46/pc



US\$ 2.10/pc

**Live Tilapia fetches the highest price in East Asian markets ...**



# ASIA: The regional tilapia trade

- Imports of food fish are increasing in Asian markets but the share of tilapia is quite small in that supply
- The most noticeable inter-regional trade is in live form

- Live tilapia is imported from China into Hong Kong
- and from Malaysia to Singapore -----these are non-producing markets

- Consumer demand for fish fillet (mostly frozen) has increased considerably in Asia which is highly dominated by *pangasius* fillet
- The share of tilapia is negligible in the fillet market,



## *On another development ----*

The high quality tilapia fillet has made a niche in the raw fish market

*Izumidai* or brackish water tilapia fillet is now used for *sushi* and *sashimi* in Japan and elsewhere

In international trade, the price of *sashimi* grade tilapia is higher at US\$ 10-11/kg.



## Growing domestic tilapia trade in Asia

- After carps, tilapia is possibly the dominant aquaculture species, contributed significantly in the region's national food security programme
- From China in the East to Bangladesh in the South, TILAPIA gets growing consumer recognition in the producing and non-producing Asian markets
- Tilapia exports take place from China, Taiwan, Indonesia and Thailand.
- However, the lion's share of supplies is absorbed by the domestic markets in Asian producing countries
- In Southeast Asia, tilapia is considered a higher value fish in the live food fish trade

## Growing domestic tilapia trade in Asian

- In many cases TILAPIA is no more an ordinary freshwater fish
- 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

# ***Retail Price increased significantly in Southeast Asia***



2007



2012



## Live Tilapia enjoys good price in East Asian markets ...

**2009 (US\$ 3.75/kg)**



**2012 (US\$ 5.65/kg)**



# Asian Markets for Live Tilapia :

**GROWING MARKETS** : *China, Hong Kong Taiwan, Malaysia, Singapore, Thailand, Vietnam*

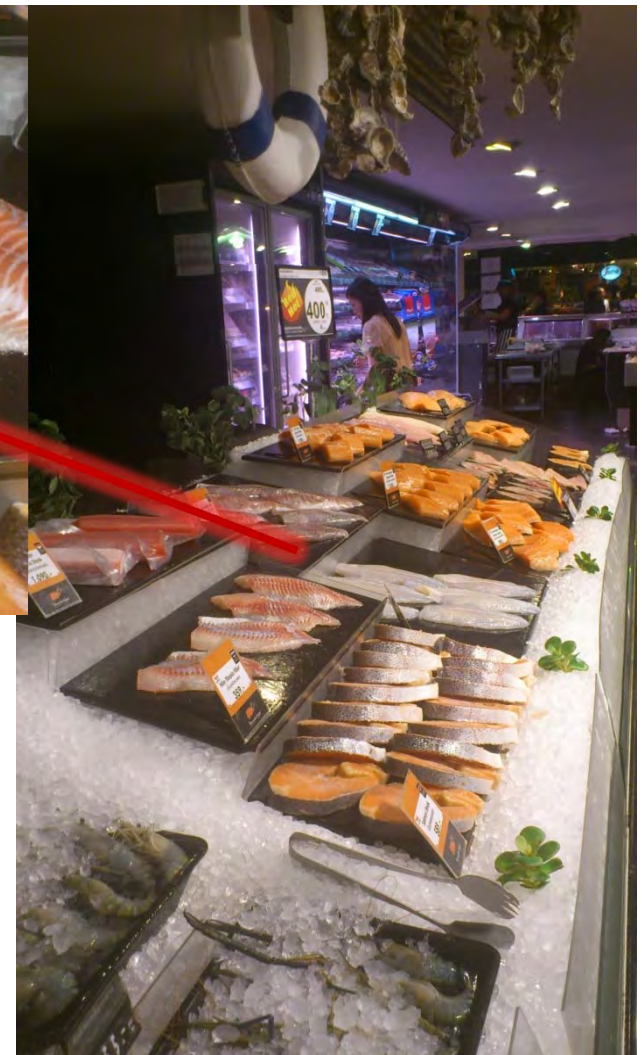
**OUTLETS** : *Supermarkets, seafood restaurants and hospitality industry*

**CONSUMERS** :

- *Urban effluent residents*
- *Domestic and foreign tourists*



**There is a premium price for fresh TILAPIA fillet**



## Domestic Market in Asia

Fresh tilapia price  
ranges from US\$  
1.25- 3.50/kg





# Ready to eat- TILAPIA





# Western Pacific Island nations introduced tilapia aquaculture for food security

- To ensure food security in the coming years, commercial scale tilapia farming has been introduced in the Pacific
- Papua New Guinea (PNG) is the region's leader in tilapia farming; there are >20,000 households scale farms in the country. Currently an EU - funded Project also support medium scale commercial operation in lakes and reservoirs
- Small scale pond aquaculture has also been introduced in Fiji.



The Highlander in PNG

THANK YOU