



The Production and market of tilapia in China

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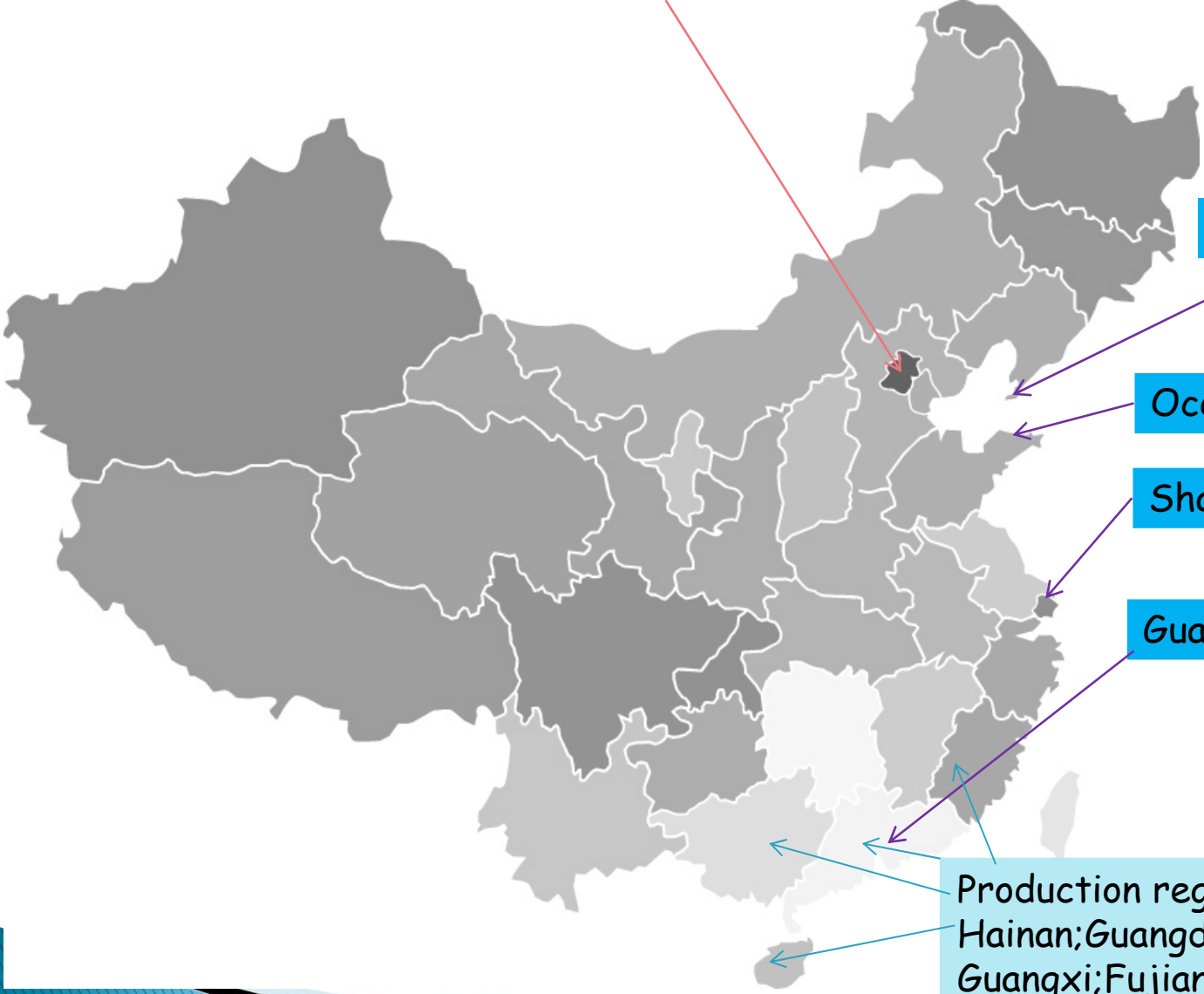
年年有余

Fish=鱼 (by meaning)

鱼=余 (by pronunciation)

余=surplus, extra, abundance

Capital: Beijing, MOA...
Policies, rules, standards



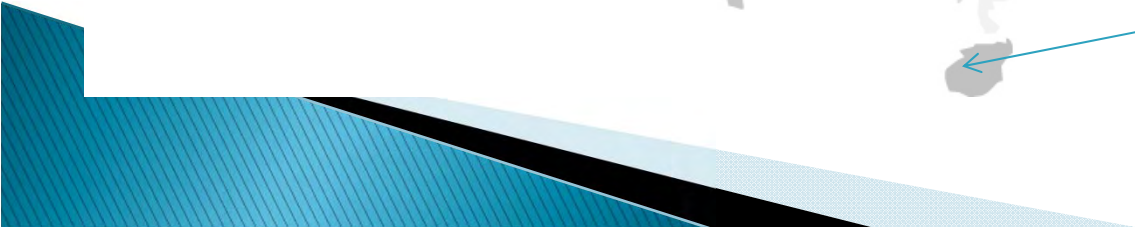
Dalian ocean univ.

Ocean univ. of China

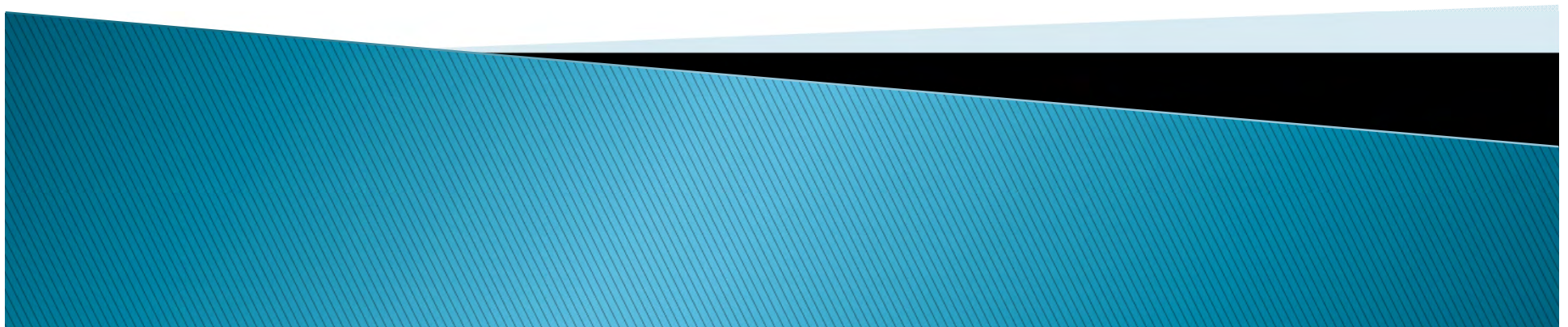
Shanghai ocean univ.

Guangdong ocean univ.

Production region:
Hainan;Guangdong
Guangxi;Fujian



China Fisheries Profiles



China Fisheries Profiles:

Production

- Domestic production (cultured): e.g. **Tilapia**
- Imported raw fish (captured)

Processing

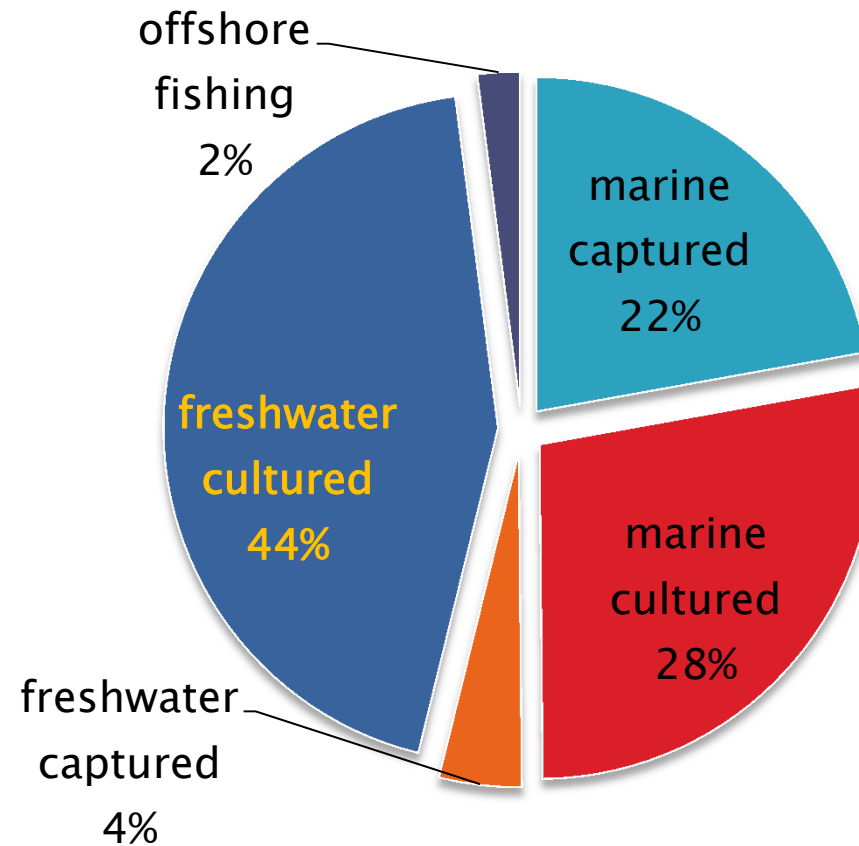
- Global center of fish (**whitefish**) processing industry

Marketing

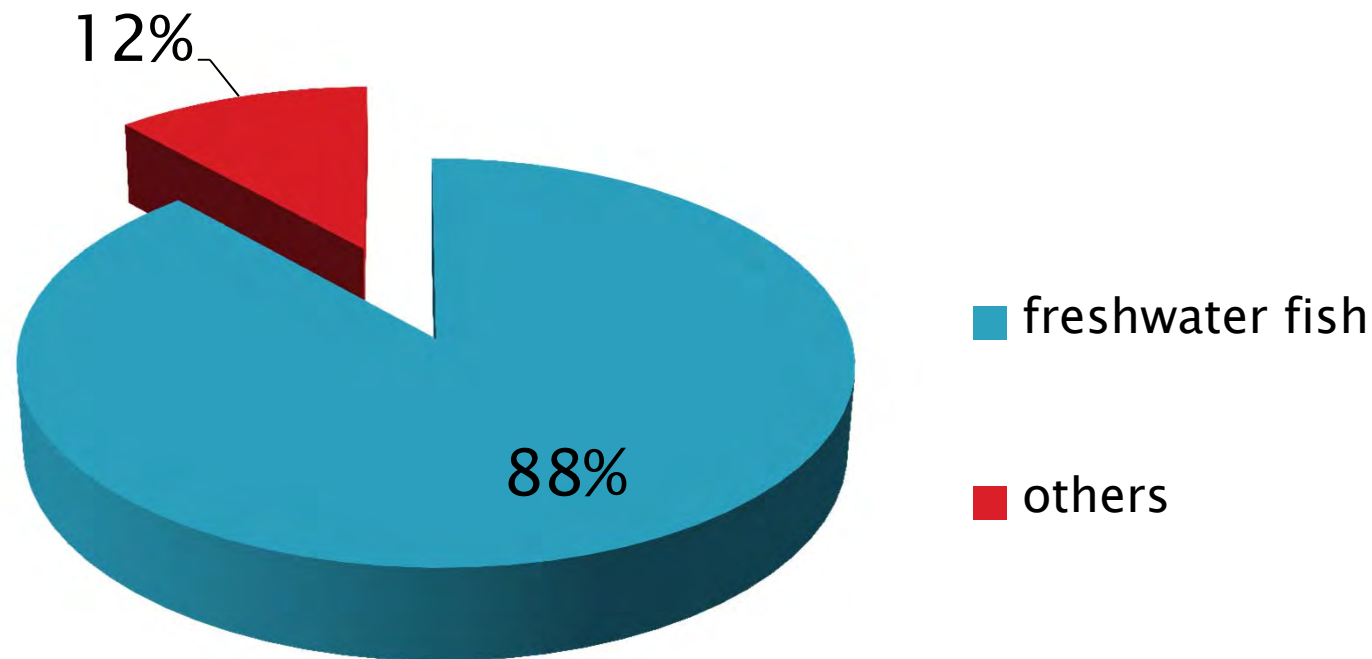
- Overseas: largest supplier
- Domestic: largest consume market(**booming**)

Distribution of total fishery production (2011) *million tons*

| | |
|----------------------------|--------------|
| marine captured | 12.42 |
| marine cultured | 15.51 |
| freshwater captured | 2.23 |
| freshwater cultured | 24.72 |
| offshore fishing | 1.15 |
| Total | 56.03 |

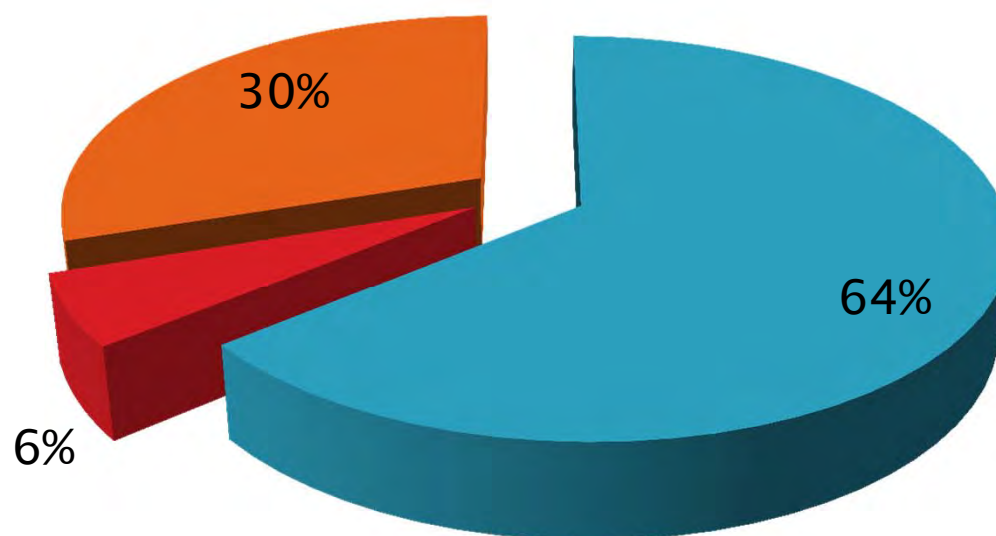


fish in total freshwater culture production (2011)

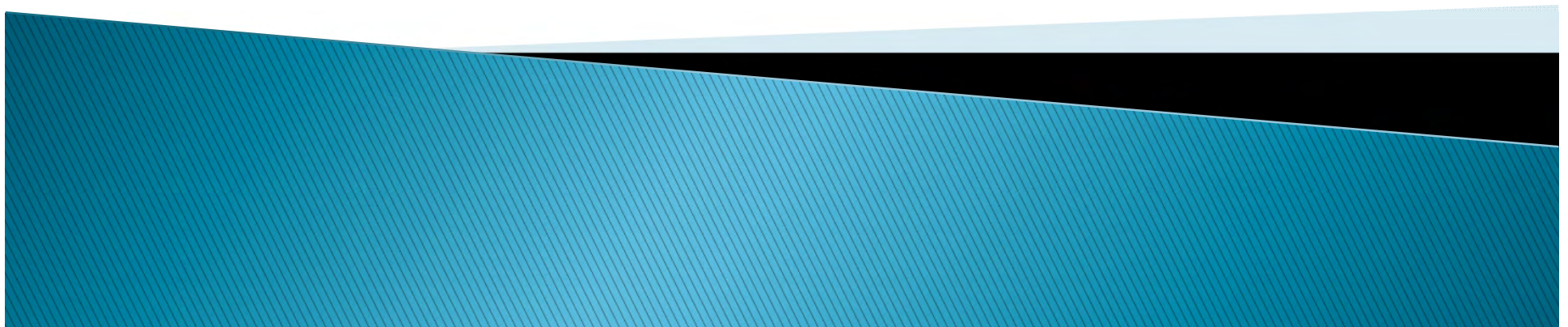


Share of tilapia and carps in freshwater fish cultured in 2011

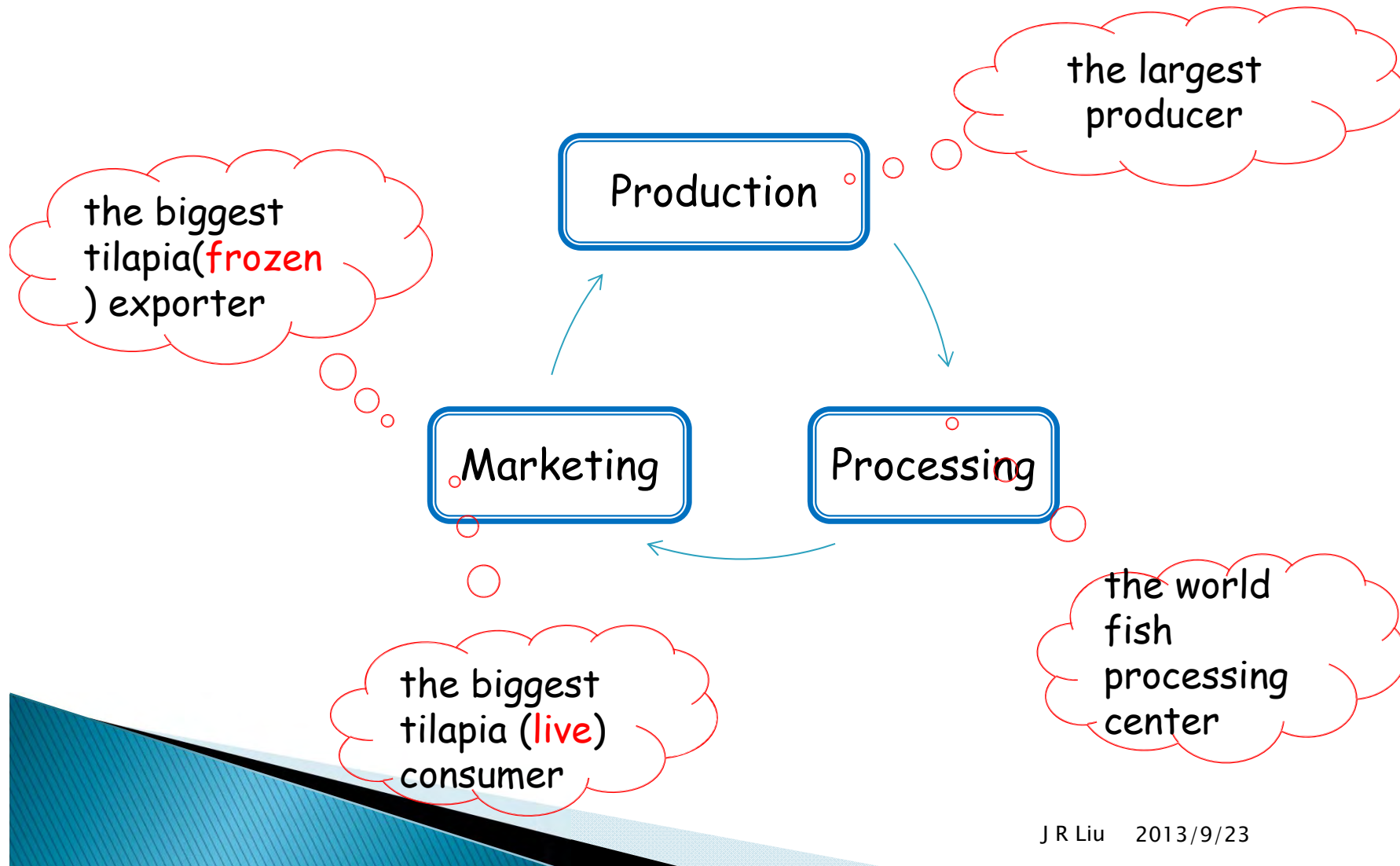
■ carps ■ tilapia ■ other species



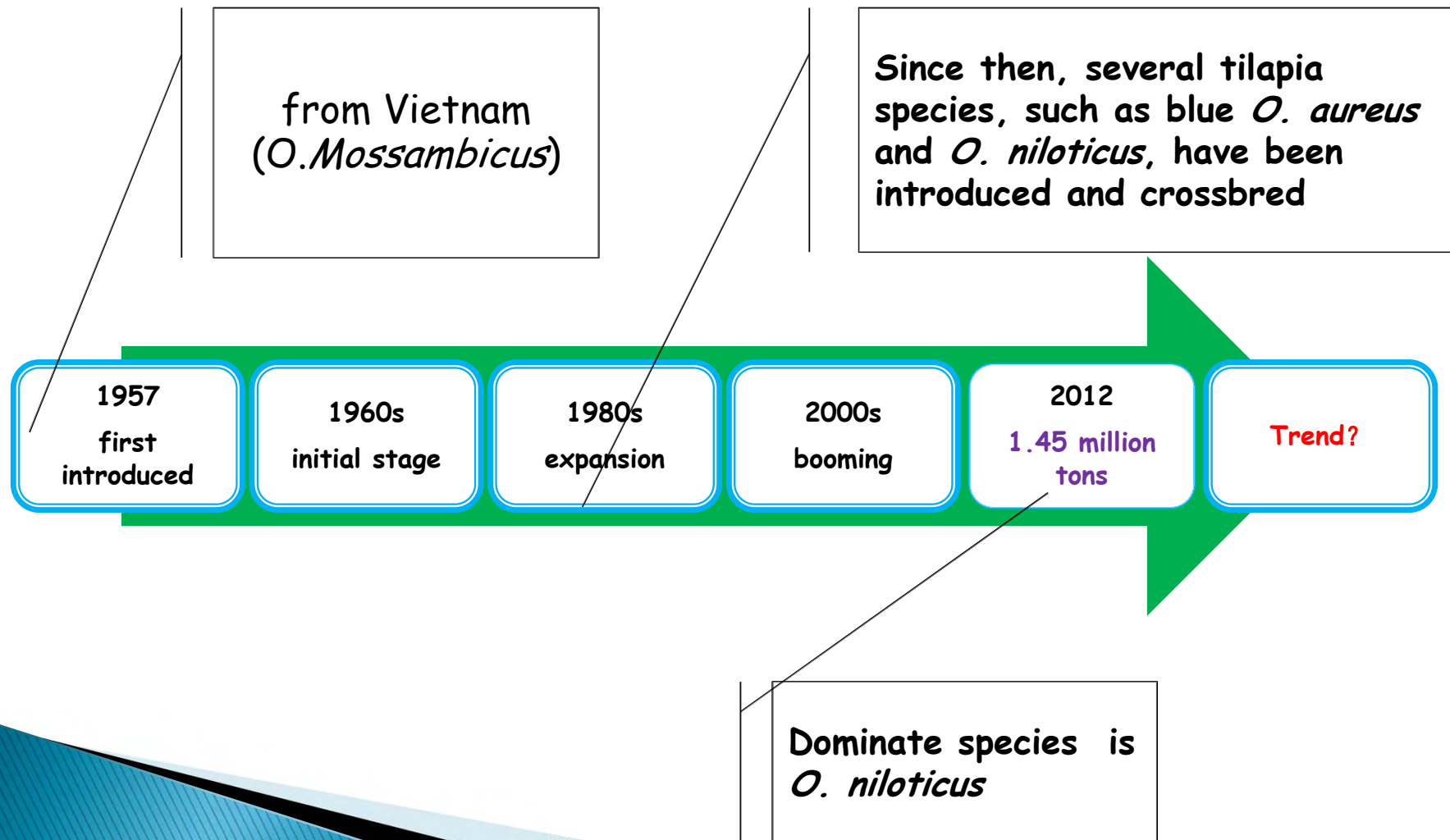
China's Tilapia production



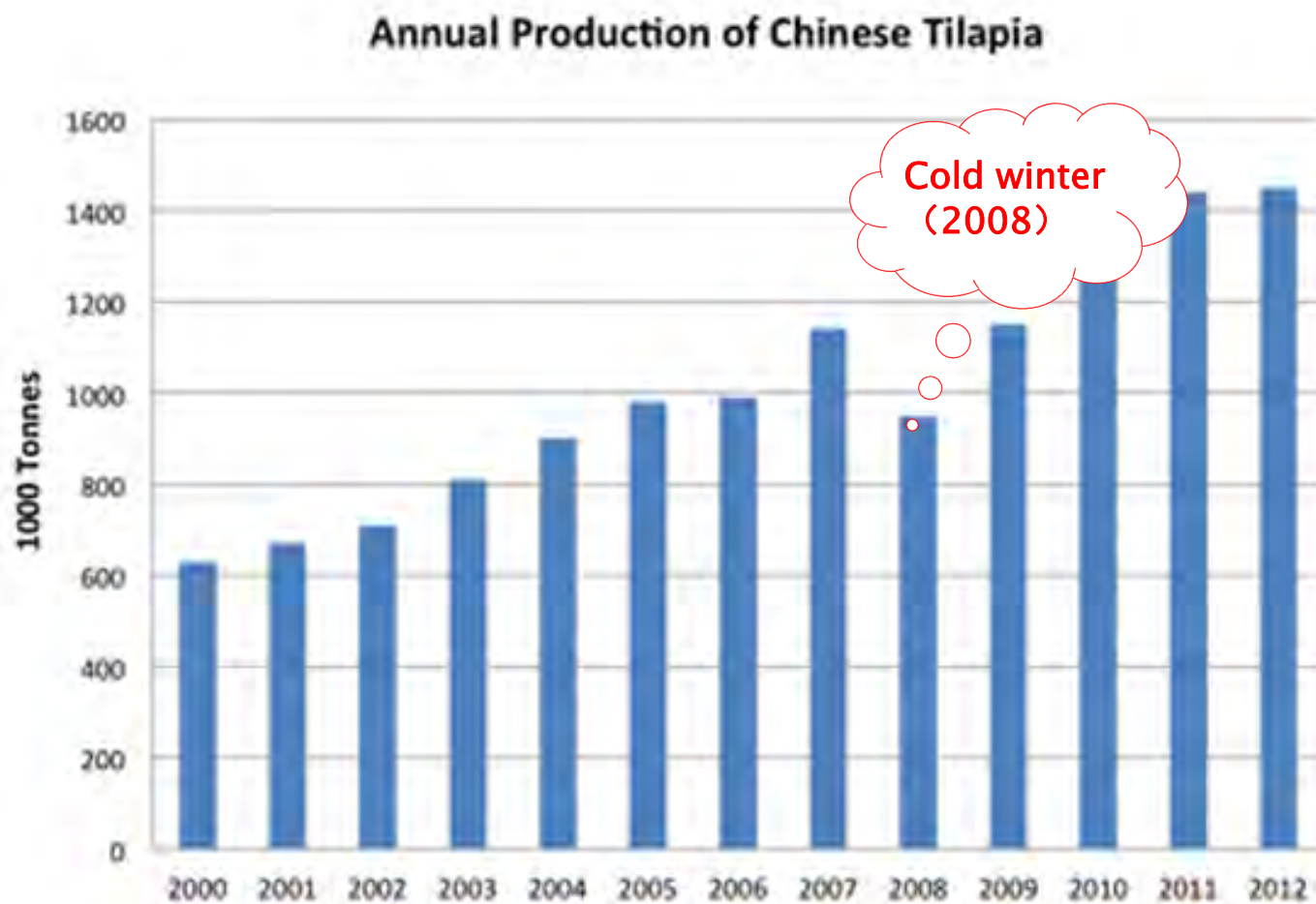
Role of China in global tilapia supply chain



Timeline of Tilapia in China



Trend of tilapia production between 1997 to 2012



China's stat. of tilapia (2012)

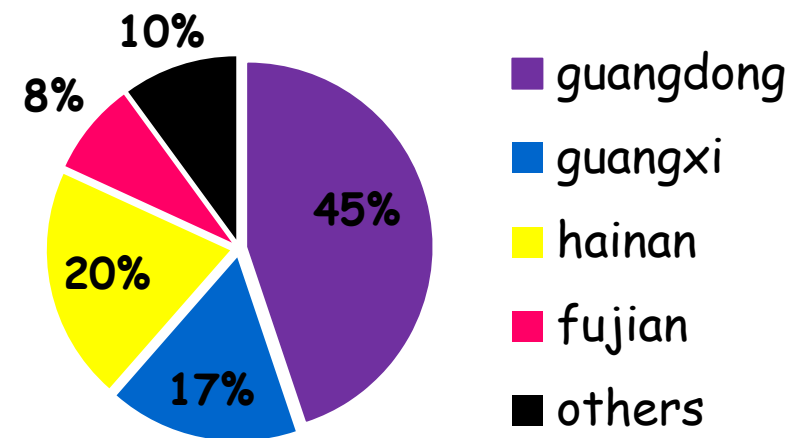
- ▶ Production
 - Global total : 3.79million tons
 - China total : 1.45 million tons
- ▶ Processing (for exporting)
 - Quantities:
 - raw fish: 946,000 tons of live weight (65.2% of total)
 - frozen products: 350,000 tons
 - Oversea market
- ▶ Domestic market:
 - Consumption forms: Live fish
 - Quantities:
 - 500,000 tons (34.8% of total)
 - Main markets:
 - guangxi, yunnan ,sichuan, guizhou (mainly, inland area)

Tilapia in China's national modern agriculture plan

- ▶ 2007, national modern agriculture "PLAN" (by MOA and MOF)
 - "National Modern Agricultural and Industrial Technology system"
- ▶ Total 50 species
 - 34 corps
 - 11 livestock
 - 5 aquatic species
 - Freshwater(Carps)
 - Shrimps
 - Flatfish
 - Molluscs
 - **Tilapia:** national technology system of tilapia industry



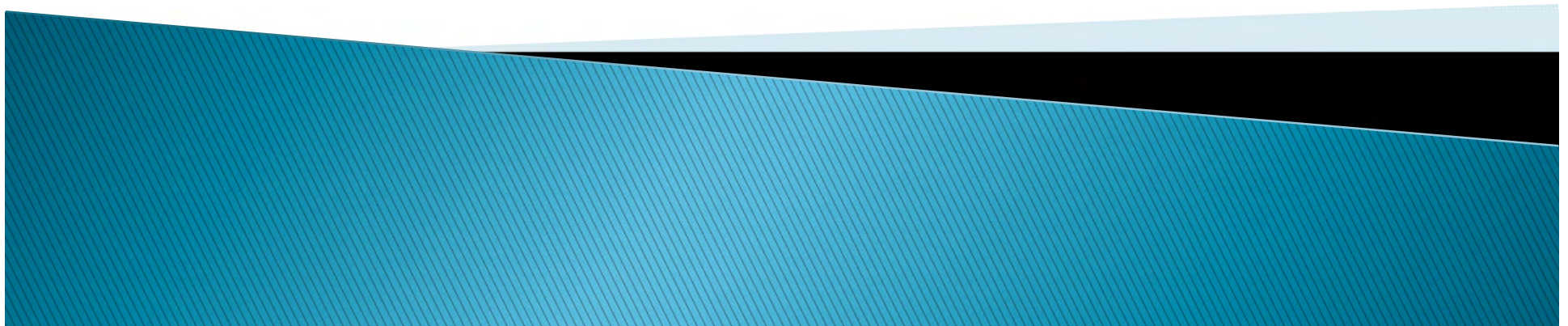
Tilapia production areas



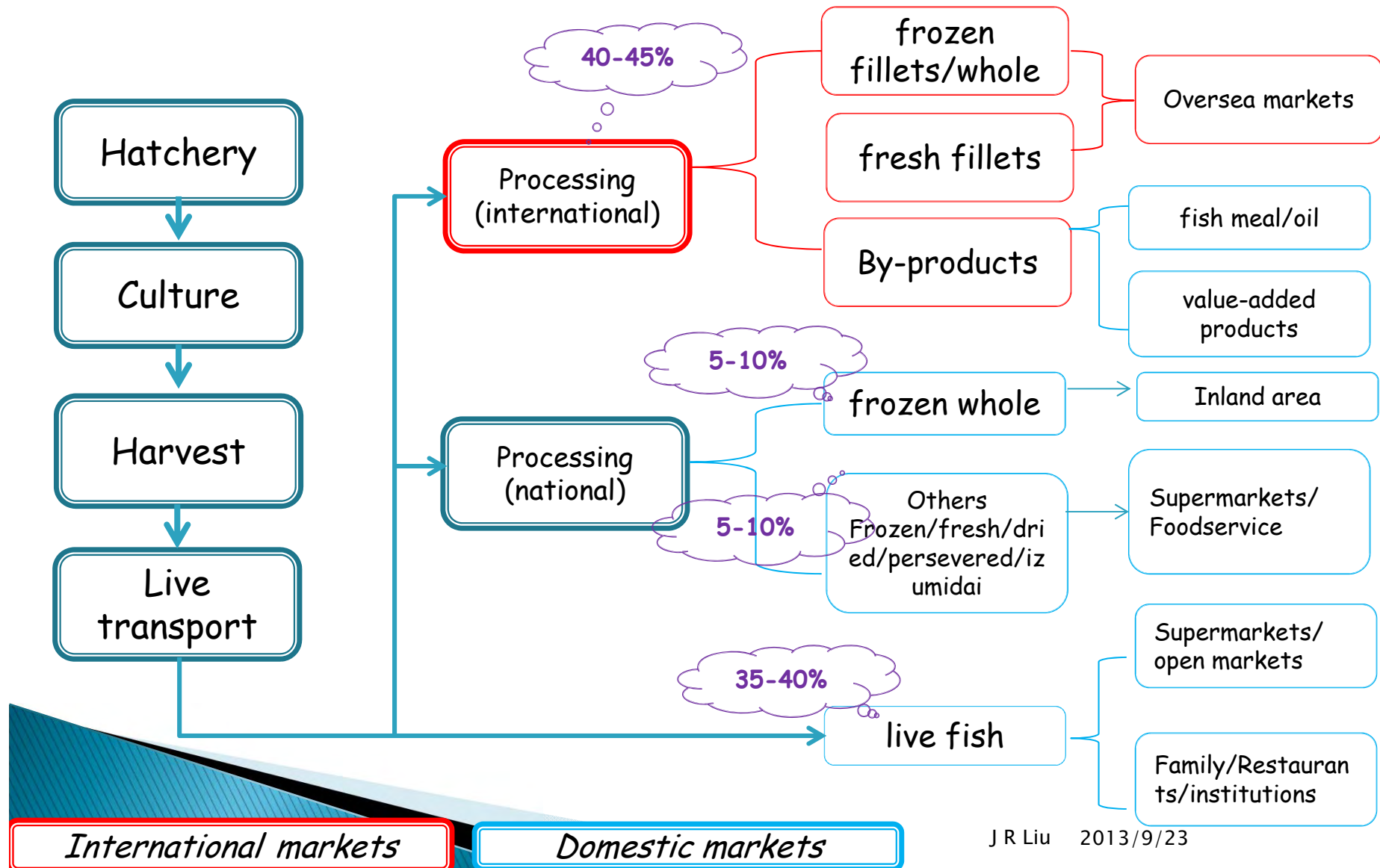
Share of tilapia production by provinces in 2011

International markets

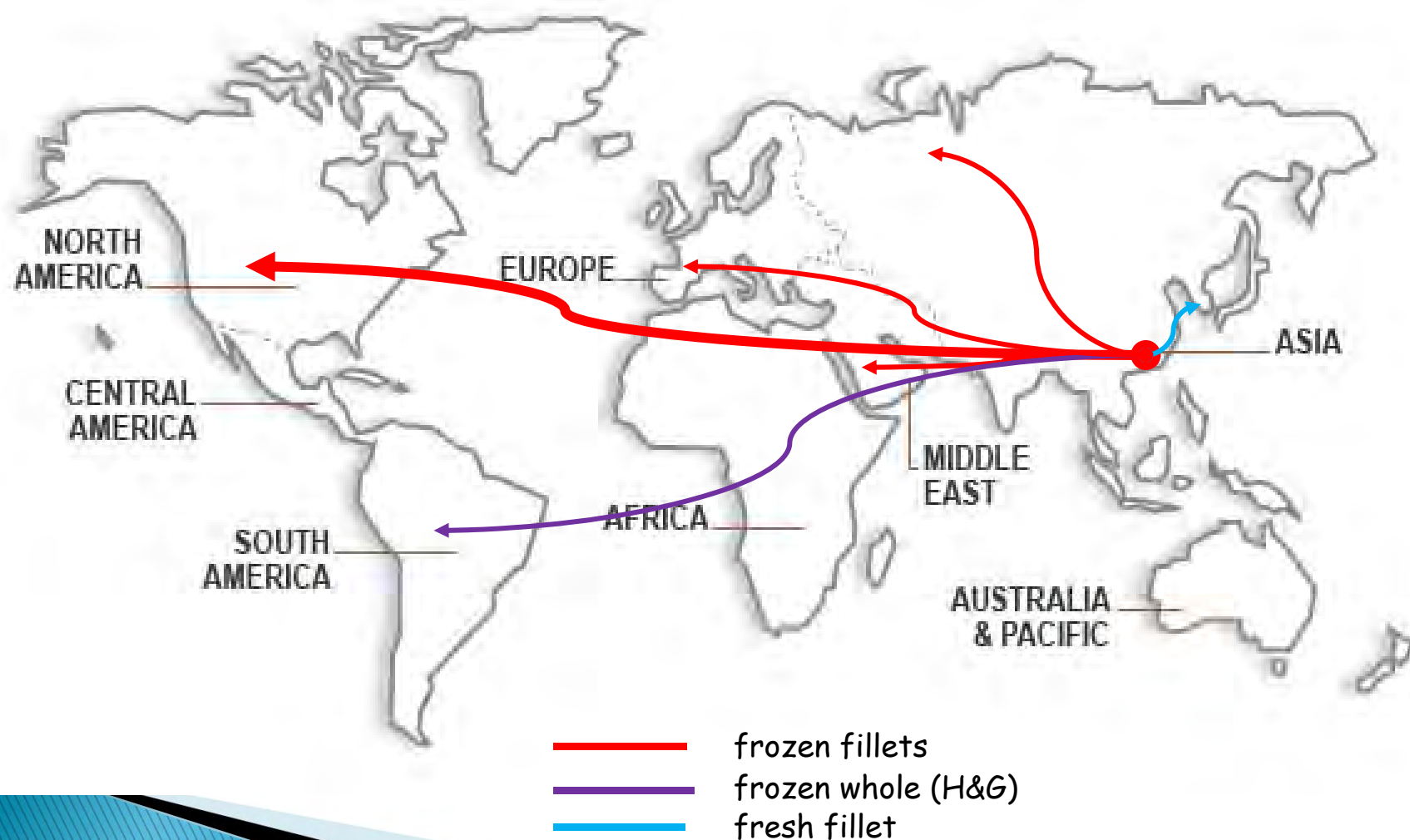
Resistance level around the corner



Tilapia supply chain in China



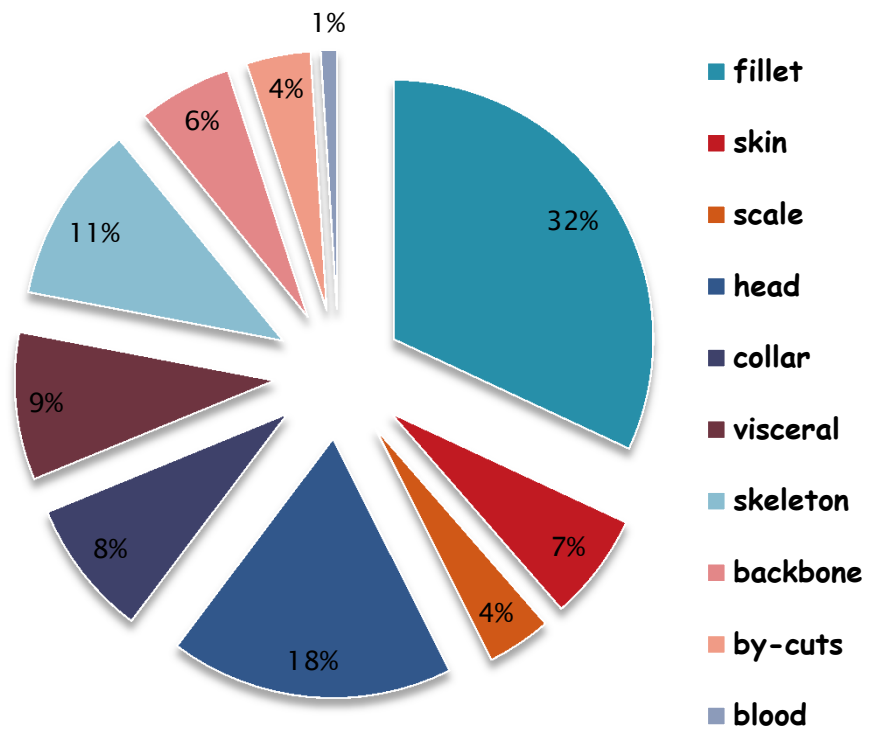
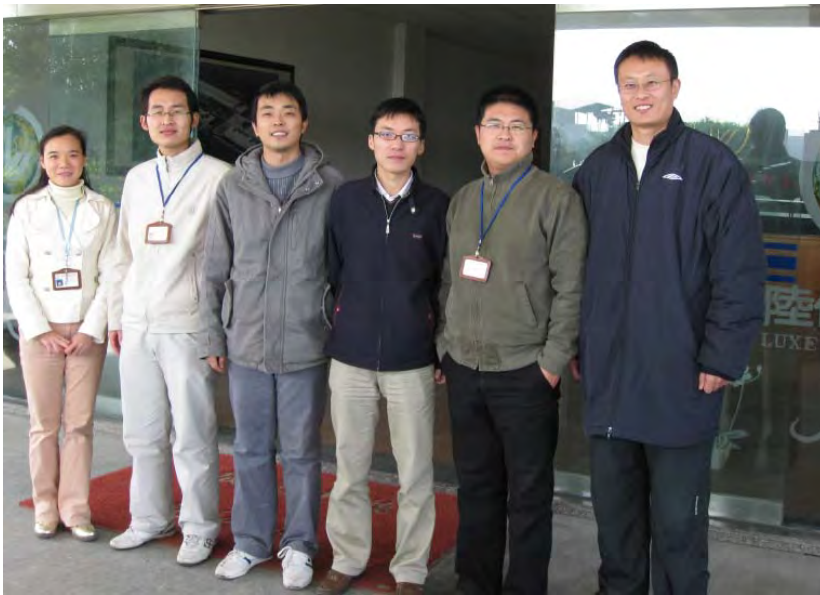
Main export markets of Chinese tilapia



Challenges and Opportunities

- ▶ Competitive tilapia producers
 - Tropical climate/Low labour costs
 - Areas suitable for tilapia culture
 - Africa, Southeast Asian and Latin America countries
- ▶ Competitive substitutes species
 - Pangasius
- ▶ Overall rising costs(huge disadvantage for exporting)
 - Production costs (labor costs ...)
 - appreciation of RMB
- ▶ Oversea markets uncertainties
- ▶ Emerging market and high-end fresh product market

A tilapia story



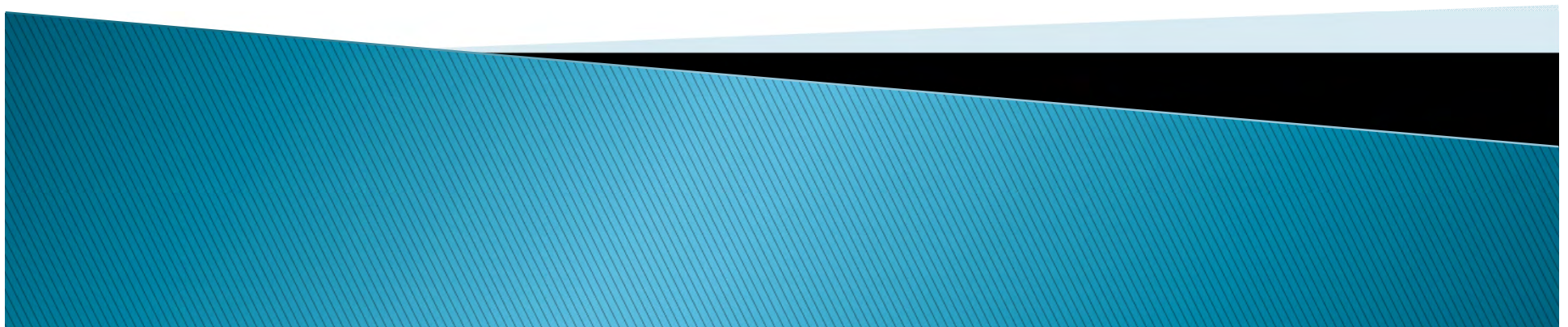
Subdividing of tilapia





Domestic market

the huge potential of the domestic market



China's freshwater fish consumption

Disadvantage

- ▶ Limited consumption :
 - areas
 - Inland mainly
 - eating habits
 - eating home
 - "muddy taste"
 - only prefer live fish

Advantage

- ▶ Huge Population
- ▶ Urbanization
- ▶ Increasing in
 - Incomes
 - attention to healthy foods
- ▶ Changing in
 - Life style
 - Eating out, eating fish

New Domestic market driving factors

- ▶ Our population and average demand for fish keep increasing;
- ▶ People are changing living style
 - eating out, food fashion chasing
 - Booming of Sichuan restaurants all around countries
- ▶ China's food supply chain has been suffering from some serious problems.
 - Bird flu(Chicken?);Dead pig(Pork?);Rat meat(Lamb?)
 - A strong push to switch to fish

Freshwater fish Boom in china





Main issues

- ▶ Sustainability
 - negative impacts on environment
 - threaten by deteriorating environment in turn
- ▶ Food safety
 - disease/animal welfare/food safety
- ▶ Production uncertainty:
 - extreme weather interruption
- ▶ Low value adding along the supply chain
 - neglecting brand building

Ongoing Measures

to achieve a sustainable development of China's tilapia industry, government enterprise and academia are joining hands to take several measures focusing on points below:

- Improve tilapia aquaculture management
- Compliance with the international standards
- Educating rural farmers
- Building a whole chain traceability system

Conclusion

- ▶ Production level will stay in stable
- ▶ China will maintain its "driver's seat"
- ▶ Export market will have at most a slight increase
- ▶ Domestic market will enjoy a potential demand
- ▶ Sustainability is the key word for China's tilapia industry's future.

Thank you and welcom to China

