Fish, Fish Products and Shrimp
Production, Trade and Trends

INFOFISH World Shrimp Conference and Exhibition
Bangkok – November 2019

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The Pattern of Global Fish Production throughout the Years
Status of Fish Stocks

**DO NOT** group the categories "maximally sustainably fished" and "overfished".

"Maximally sustainably fished" is generally the target of fishery management

"Overfished" is a situation to be avoided or overcome through fishery regulations.

Regional state of the world's marine fish stocks (2015 data)
What are the Top Producing Countries?

Top Producing Countries

<table>
<thead>
<tr>
<th>Capture</th>
<th>Aquaculture</th>
</tr>
</thead>
<tbody>
<tr>
<td>China 19%</td>
<td>Others 17%</td>
</tr>
<tr>
<td>Others 43%</td>
<td>Indonesia 15%</td>
</tr>
<tr>
<td>India 6%</td>
<td>India 5%</td>
</tr>
<tr>
<td>Russia 5%</td>
<td>Vietnam 3%</td>
</tr>
<tr>
<td>Peru 4%</td>
<td>Bangladesh 2%</td>
</tr>
<tr>
<td>USA 5%</td>
<td>China 58%</td>
</tr>
<tr>
<td>Japan 4%</td>
<td>Norway 2%</td>
</tr>
<tr>
<td>Vietnam 3%</td>
<td>Malaysia 2%</td>
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</tbody>
</table>

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Production – Relative Shares

Capture Fisheries

Aquaculture

Aquaculture – Top Produced Species

Volume

Value

Brown seaweeds

Others

Shrimps

Salmon

Clams

Red seaweeds

Clams

Scallop

Mussels

Others

Oysters

Shrimps

Salmon

Oysters

Brown seaweeds

Scallop

Mussel
Aquaculture – Top Producing Countries

Volume

Value

China

Indonesia

Viet Nam

Chile

Others

Norway

Japan

India

Philippines

Others

Viet Nam

Indonesia

Chile

China

Source: OECD-FAO Agricultural outlook 2019-2028
Fish is really an Important International Commodity
World Seafood Trade Map

Top Export and Import Countries

<table>
<thead>
<tr>
<th>Import</th>
<th>USA</th>
<th>China</th>
<th>Russia</th>
<th>France</th>
<th>Sweden</th>
<th>Germany</th>
<th>Italy</th>
<th>UK</th>
<th>Others</th>
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<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Export</th>
<th>China</th>
<th>Norway</th>
<th>USA</th>
<th>Chile</th>
<th>India</th>
<th>Indonesia</th>
<th>Denmark</th>
<th>Canada</th>
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<tbody>
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</tbody>
</table>

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What about Shrimp?

Shrimp – Top Producing Countries

<table>
<thead>
<tr>
<th>China</th>
<th>Others</th>
<th>India</th>
<th>Viet Nam</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indonesia</td>
<td>Ecuador</td>
<td>Thailand</td>
<td>Mexico</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>Argentina</td>
<td>United States</td>
<td></td>
</tr>
</tbody>
</table>
**Shrimp – Top Importing Countries**

<table>
<thead>
<tr>
<th>Country</th>
<th>Importing Shrimp</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States of America</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>Korea, Republic of</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td></td>
</tr>
</tbody>
</table>

**FAO Fish Price Index**

- **Decrease 3%**
- **Jan-Jul 2018/2019**
- **Lower Prices for Some Species**
- **Aquaculture and Capture Fisheries**
  - Capture fisheries: High Levels
  - Aquaculture: Decreased to 2016 levels

- **Shrimps**
- **Tunas**
Fish and Employment

Primary Sector
- Fisheries: 40.4 million
- Aquaculture: 19.3 million

Along the Value Chain
- 200 million

Women
- 13% Primary Sector
- 50% overall

International Trade of Fish and Fish Products is Changing
Fish Commercialization
Important Changes

- Specific Moments
- New Benchmarks
- and Parameters
- Product Safety Requirements
- Sustainability Certification
- A New “Know your Product” Approach
  - New Areas
  - Social Responsibility

Fisheries – Today and Tomorrow

Challenges
- Land Availability
- Technology
- Capital Availability
- Climate Change
- Governance
- Food Safety
- Fisheries Management
- Traceability
- Fraud

Demand Incentives
- Population Flows
- Better Income Distribution
- New Technologies

Possible Problems
- Trade Barriers
- Trade Distortions
And the Future?

World Population Increase

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2030</td>
<td>8.6 billion</td>
</tr>
<tr>
<td>2050</td>
<td>9.8 billion</td>
</tr>
<tr>
<td>2100</td>
<td>11.2 billion</td>
</tr>
</tbody>
</table>
Conversion Rates of Animal Proteins

Feed conversion efficiency of aquatic farming vs. land-based farming

- **Beef**
  - 3.5-9kg

- **Sheep**
  - 4-6kg

- **Pork**
  - 2.6-4.4kg

- **Poultry**
  - 1.4-1.8kg

- **Salmon**
  - 1.1-1.3kg

- **Shrimp**
  - 1.1-1.9kg

- **Bass**
  - 1.3-1.6kg

- **Tilapia**
  - 1.2-1.6kg

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**Production**
- 196 million tonnes (2028)
- Importance of Aquaculture
- Aquaculture surpasses Capture Fisheries (2022)
- Aquaculture - 52% of share (2028)

**Developing Countries**
- Important in production and consumption
- Particularly in Asia

**Trade**
- Highly tradeable commodity
- Same pattern of exporting countries
- More diversified importing countries
The future with sustainable production and trade, within the overall umbrella of social responsible production

Transparency
**FAO Code of Conduct for Responsible Fisheries**

**Comprehensive Instrument**

**Fundamental Axiological Values**
- Sound, sustainable, precautionary and inclusive actions
- Co-shared responsibilities
- Holistic approach

**Main Covered Areas**
- Fisheries management
- Post-harvest
- Trade-related aspects
- Associated Issues
  - Fish production
  - Trade

**SDGs**

- 17 Goals
- 169 Targets
- 232 Indicators
SDGs – A Societal Value

Not a country issue
Not a United Nations issue
It is OUR issue
Companies are already marketing their products using the SDGs

GLOBEFISH
www.globefish.org

Analysis
Policy
Training
Events and Conferences
### Japan rejections by causes (2012 – 2018)

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</thead>
<tbody>
<tr>
<td>Microbiological</td>
<td>98</td>
<td>107</td>
<td>84</td>
<td>93</td>
<td>94</td>
<td>99</td>
<td>81</td>
<td>656</td>
</tr>
<tr>
<td>Chemical</td>
<td>140</td>
<td>78</td>
<td>68</td>
<td>59</td>
<td>42</td>
<td>36</td>
<td>24</td>
<td>447</td>
</tr>
<tr>
<td>Toxins</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>11</td>
</tr>
<tr>
<td>Others</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>8</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>242</td>
<td>186</td>
<td>154</td>
<td>158</td>
<td>136</td>
<td>143</td>
<td>106</td>
<td>1125</td>
</tr>
</tbody>
</table>

Please click on each topic for more detailed tables.
Sustainable Fish Trade
For Today and Tomorrow

CONSERVE AND SUSTAINABLY USE THE OCEANS, SEAS AND MARINE RESOURCES FOR SUSTAINABLE DEVELOPMENT

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