Fish Production Estimates & Trends 2012-2013

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Ragnar Tveteras

Scope of Analysis

- Focus on internationally traded species:
  - Typically imported to USA, Europe & Japan.
- Production forecasts for 2012 for all chosen species:
  - But for some species only major producer countries/ regions.
- Global production forecast for 2013 almost all species.

Finfish Species Included in Analysis

- Tilapia
- Salmon & Trout
  - Atlantic salmon
  - Coho salmon
  - Trout
- Catfish
  - Pangasius
  - Channel catfish
- Seabass & Bream
- Flatfishes
  - Flounders
  - Halibut
  - Turbot
- Barramundi
- Cobia
- Atlantic cod
- Bluefin tuna

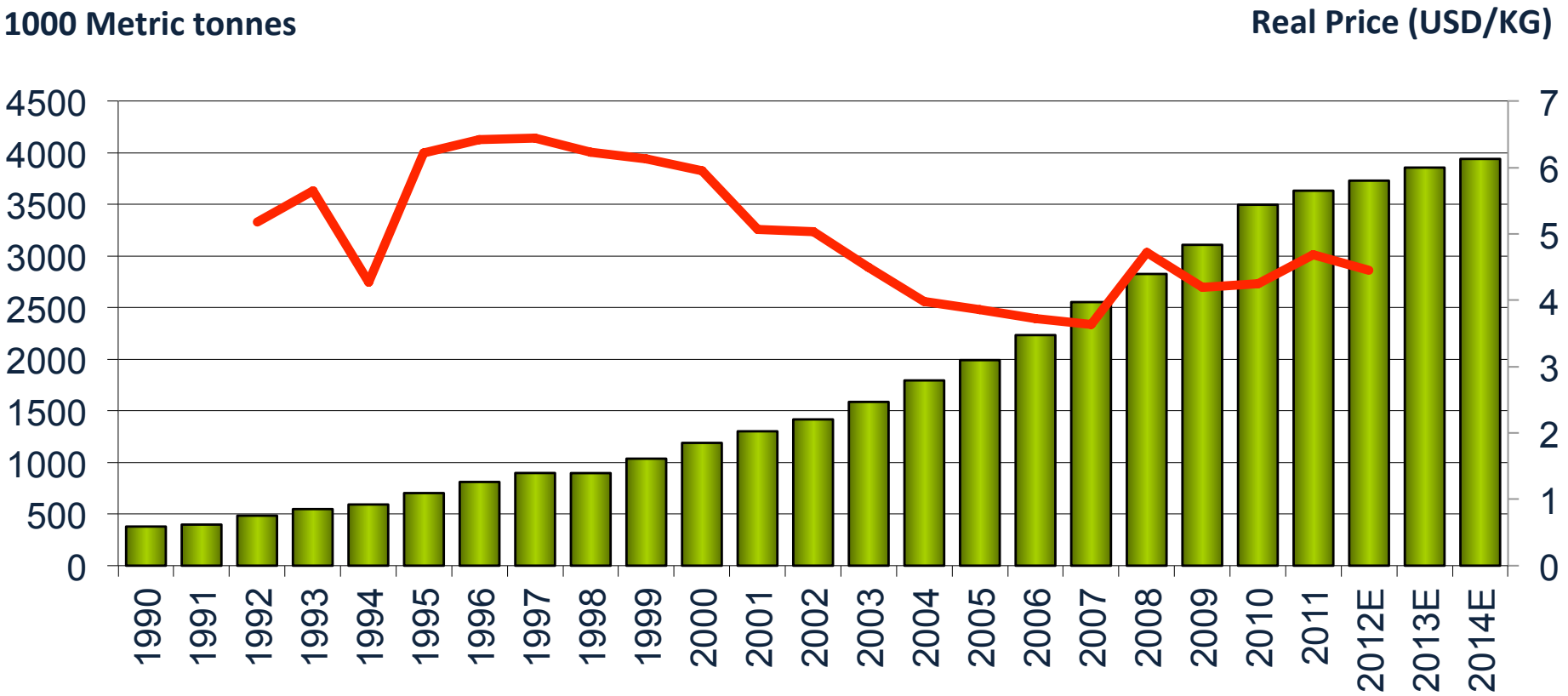
Mussel Species Included in Analysis

- Mediterranean - *Mytilus galloprovincialis*
- Blue mussel - *Mytilus edulis*
- Cholga mussel - *Aulacomya ater*
- Green mussel - *Perna viridis*

Tilapia

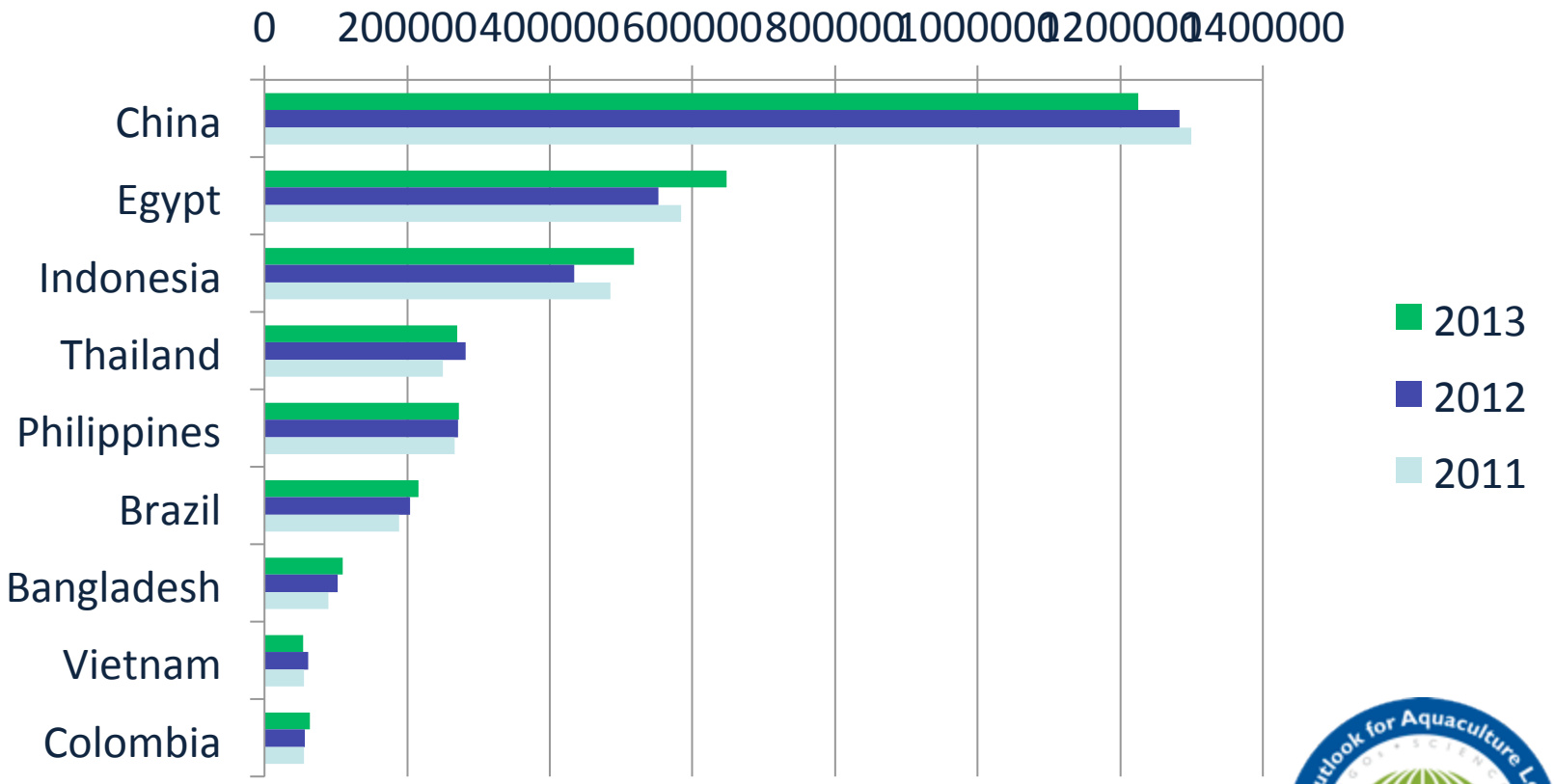
Tilapia

Global Aquaculture Production



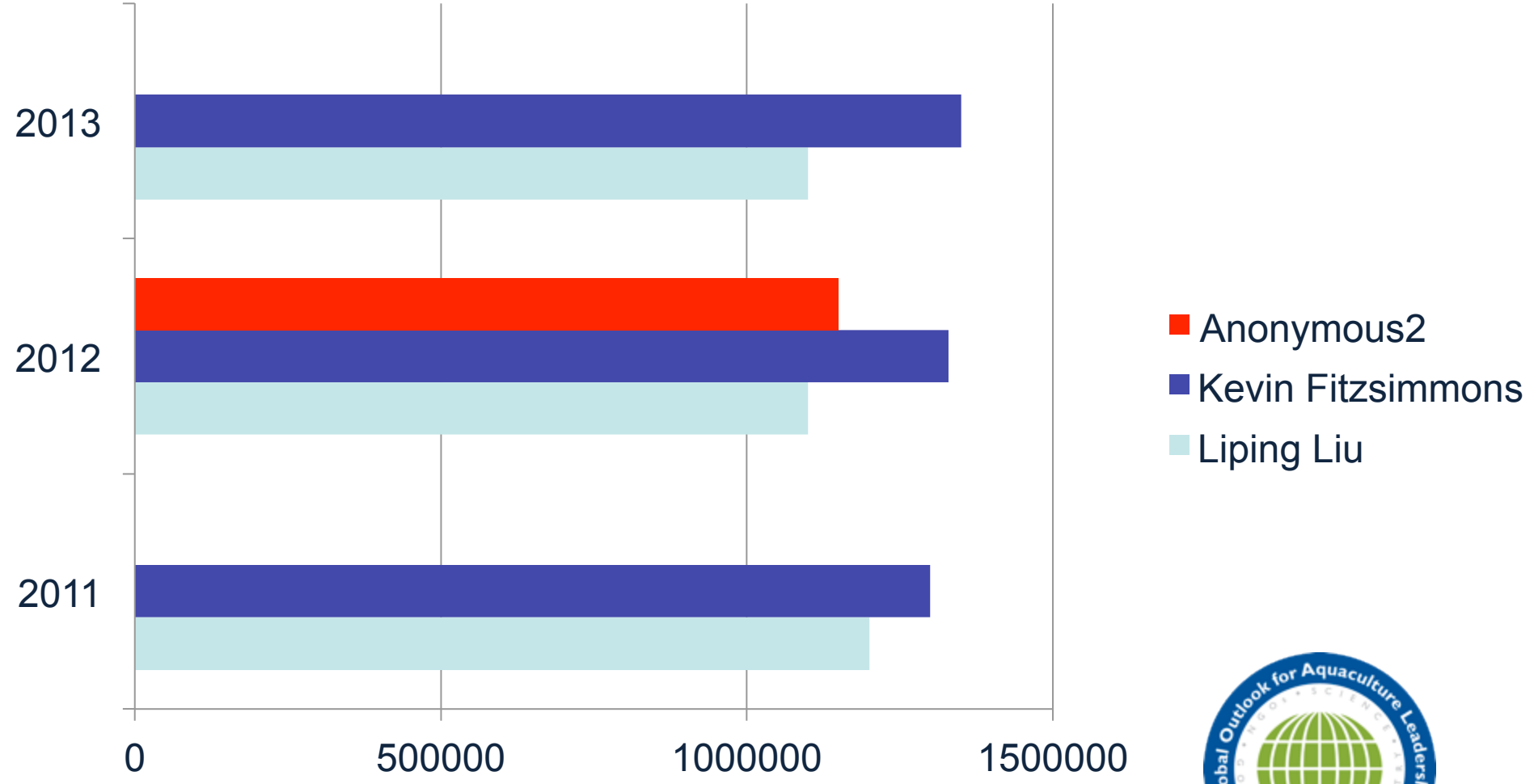
Sources: 1990-2010: FAO; 2011-2014: Kevin Fitzsimmons ; Prices US import frozen fillet: NMFS.
Note: Prices are January-December averages, except for 2012 (January-August average)

Tilapia
Production by Country

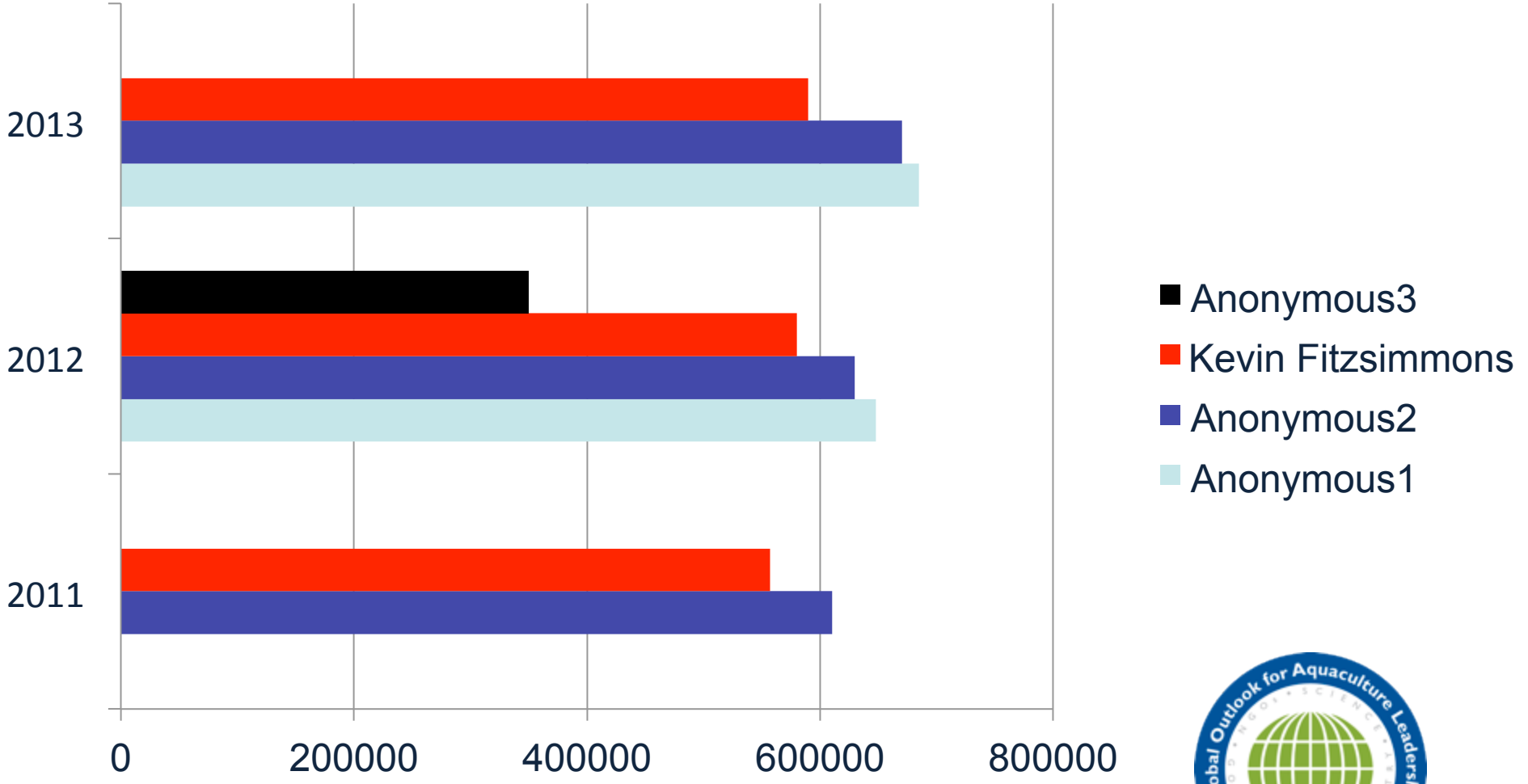


Average of estimates from several sources.

Tilapia Production Estimates For China

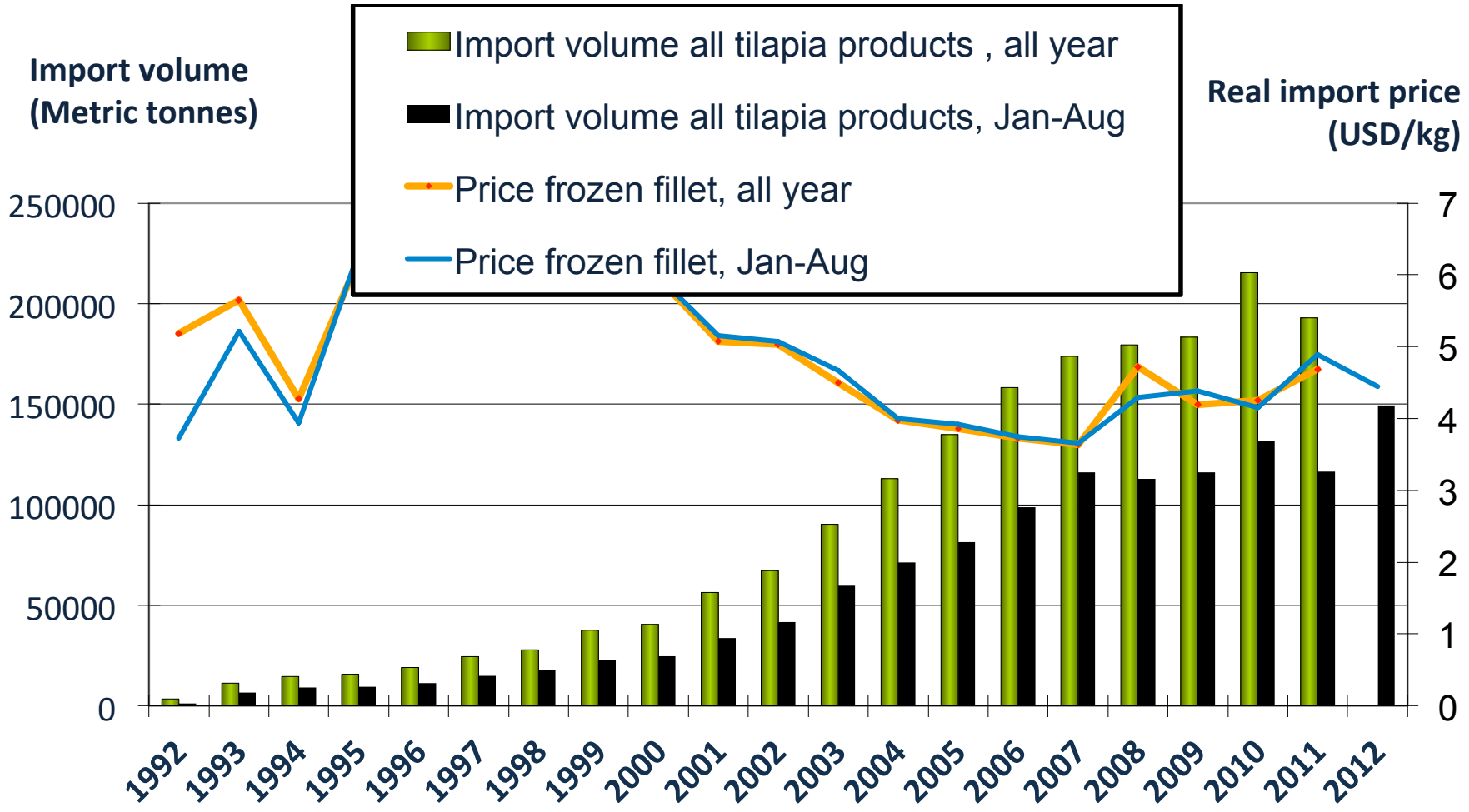


Tilapia Production Estimates For Egypt



Tilapia

U.S. Import Volume & Real Import Price for Frozen Fillets

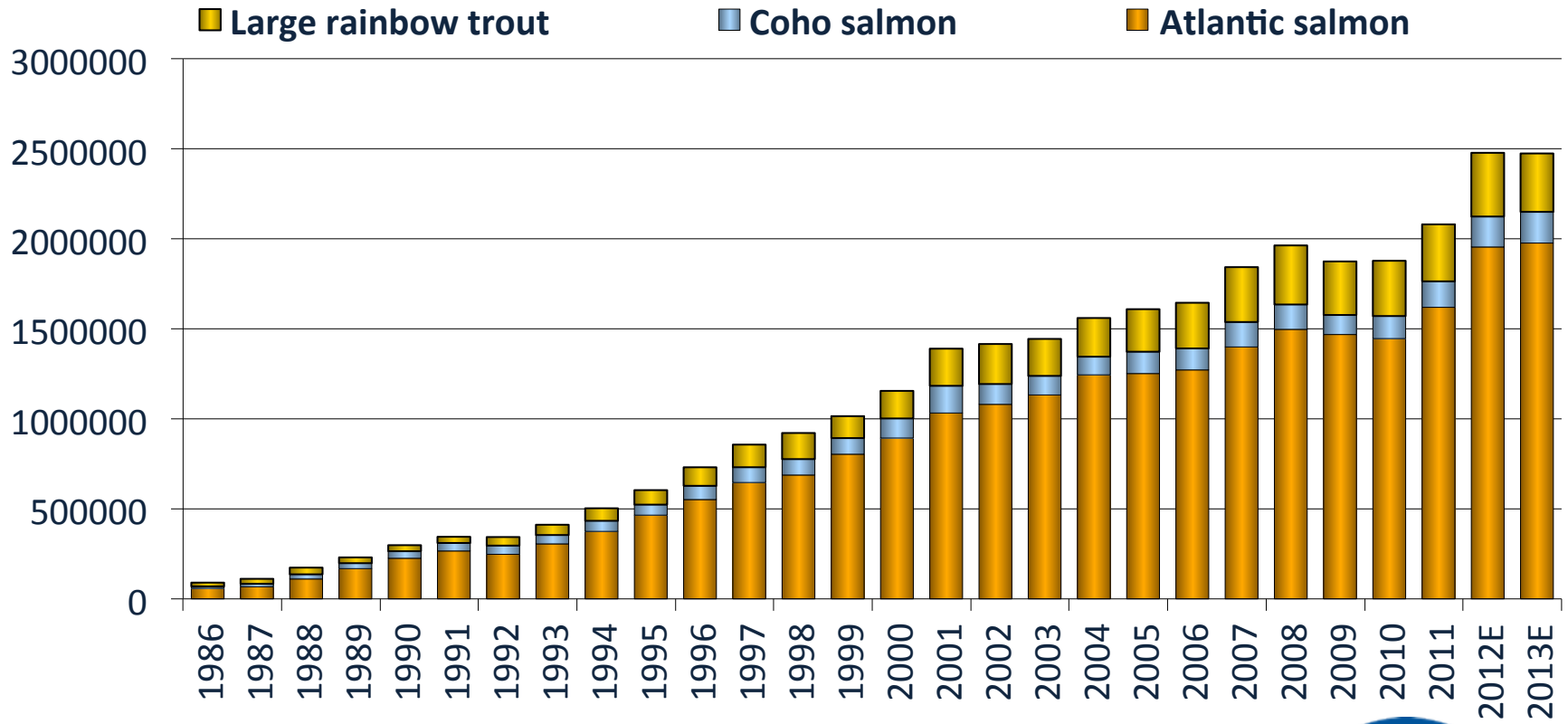


Source: Fisheries Statistics Division of the National Marine Fisheries Service (NMFS)CALIBRI

Salmonids

Atlantic & Coho Salmon & Rainbow Trout
Total Production

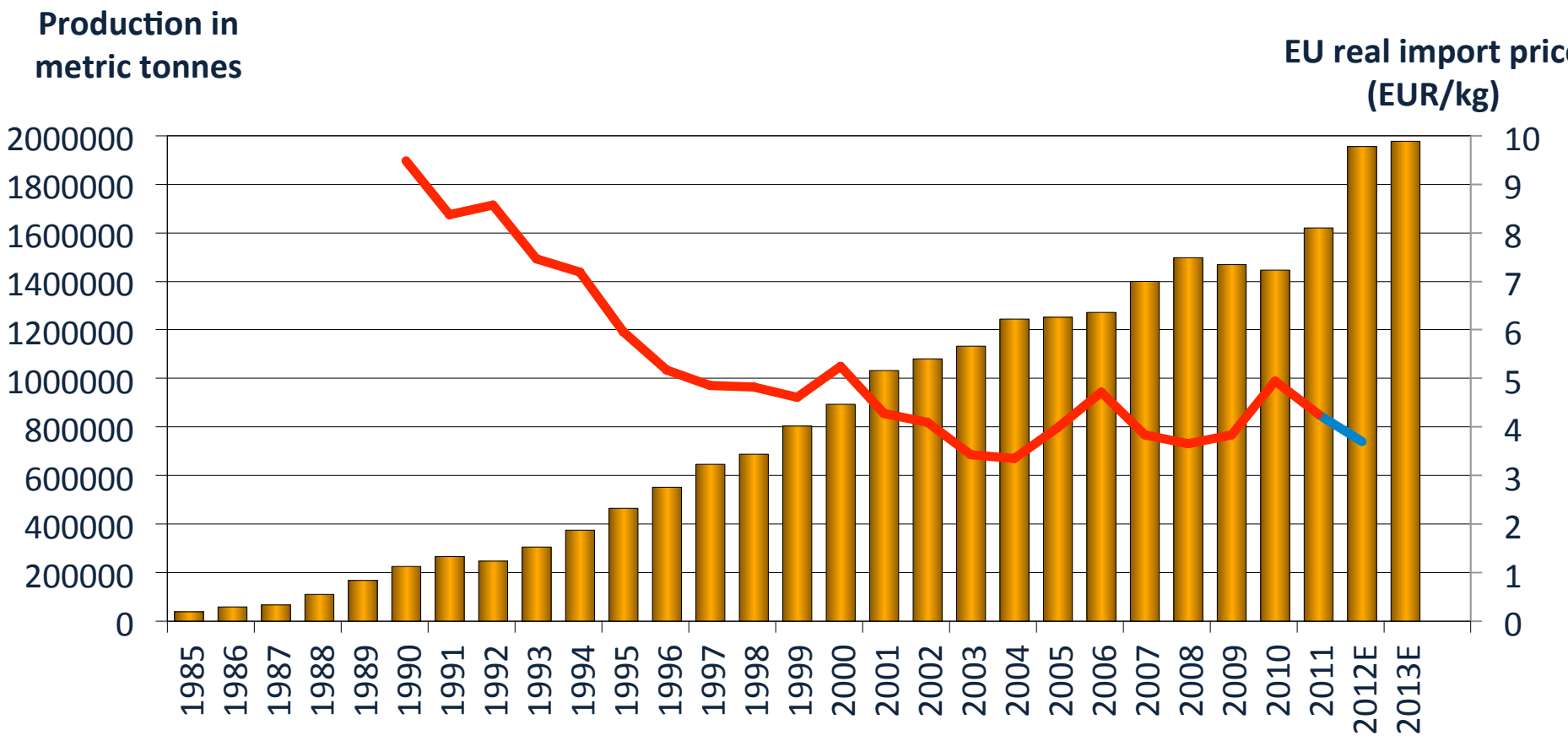
Metric tonnes



Sources: FAO, Kontali

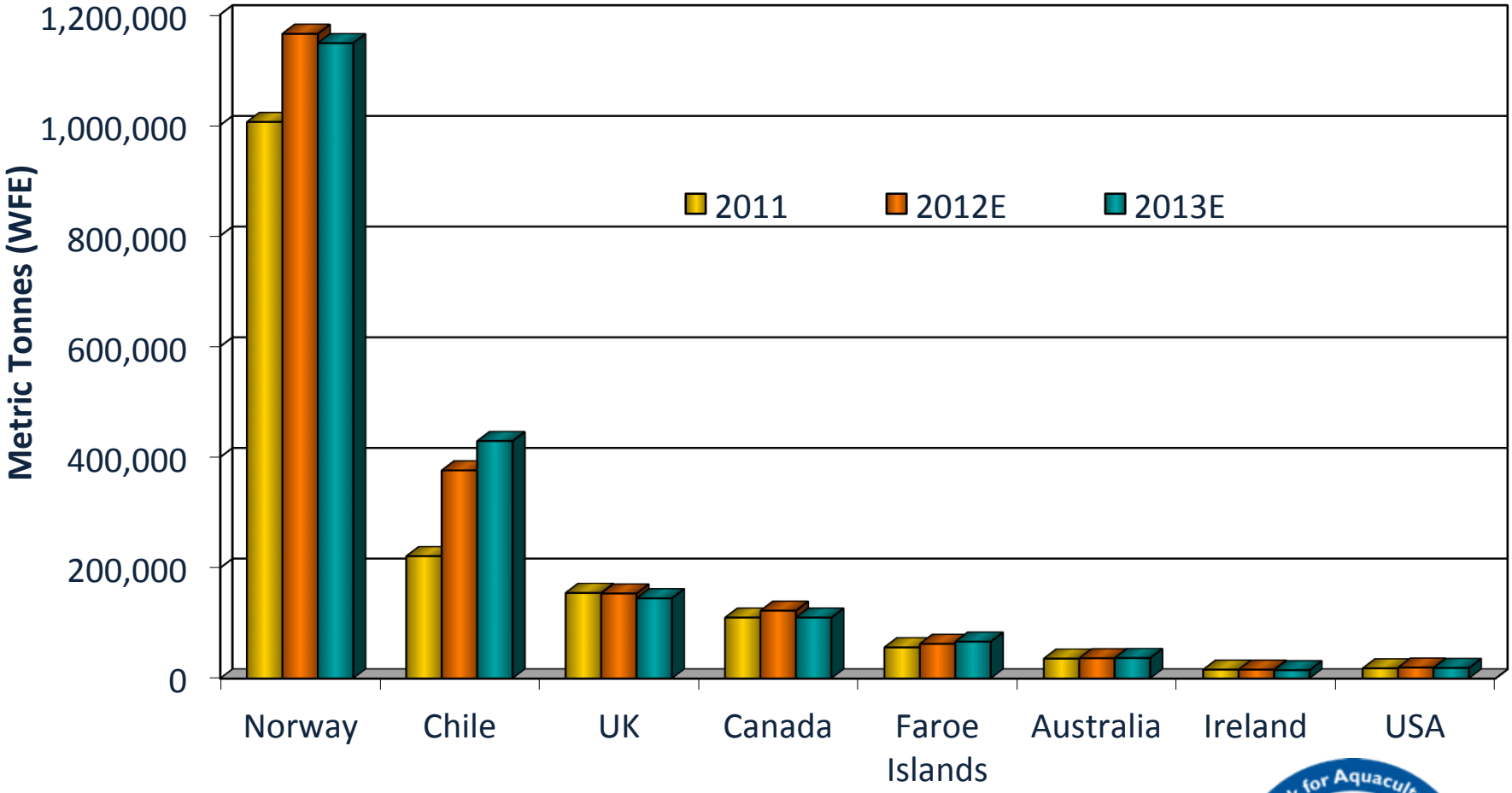
Atlantic Salmon

Production and EU15 real import price fresh gutted from Norway



Sources: FAO, Kontali, NSEC/Eurostat (prices). Note: Prices 1991-2011 are annual averages. Price in 2012 is January-August average.

Farmed Atlantic Salmon
Production



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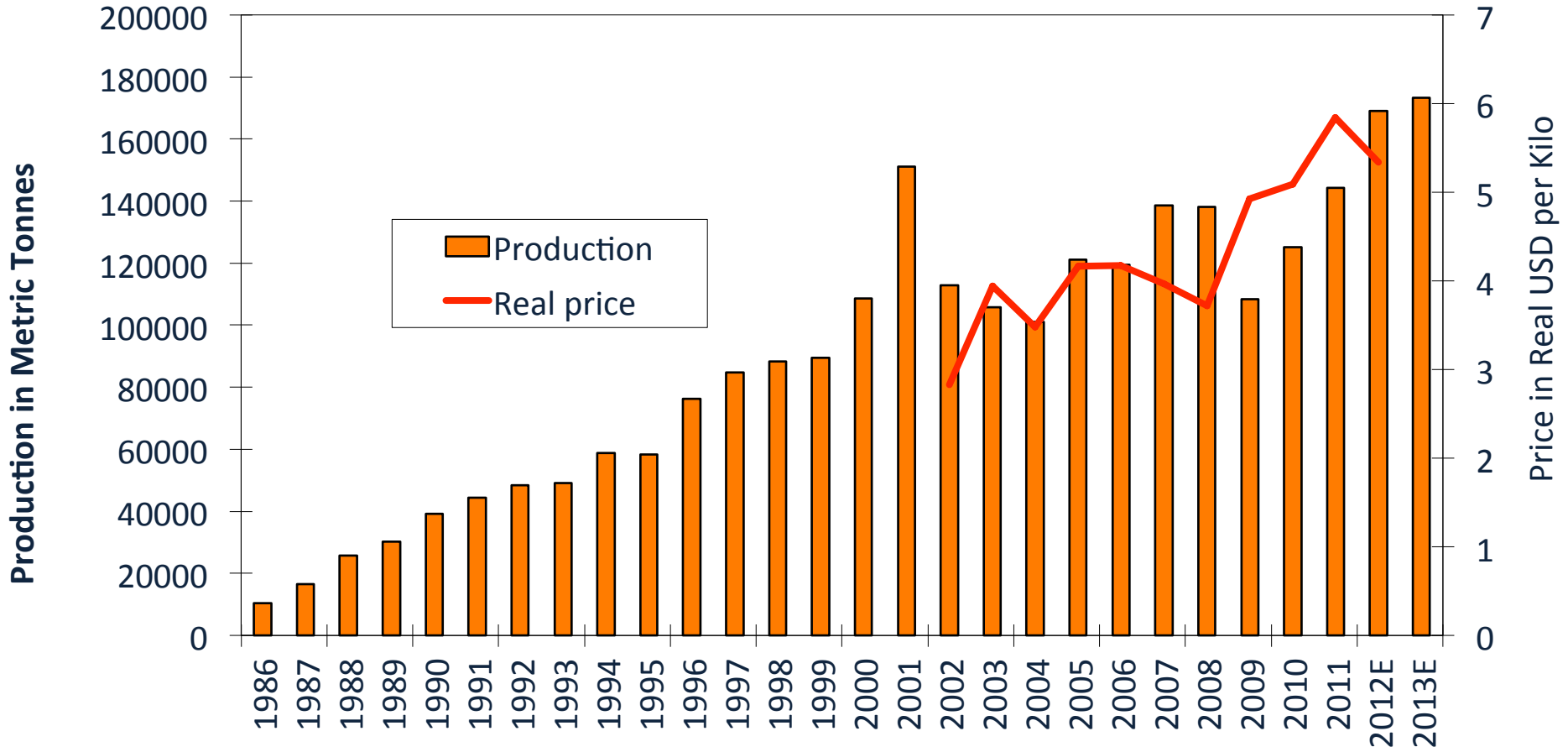
Source: Kontali

Coho Salmon

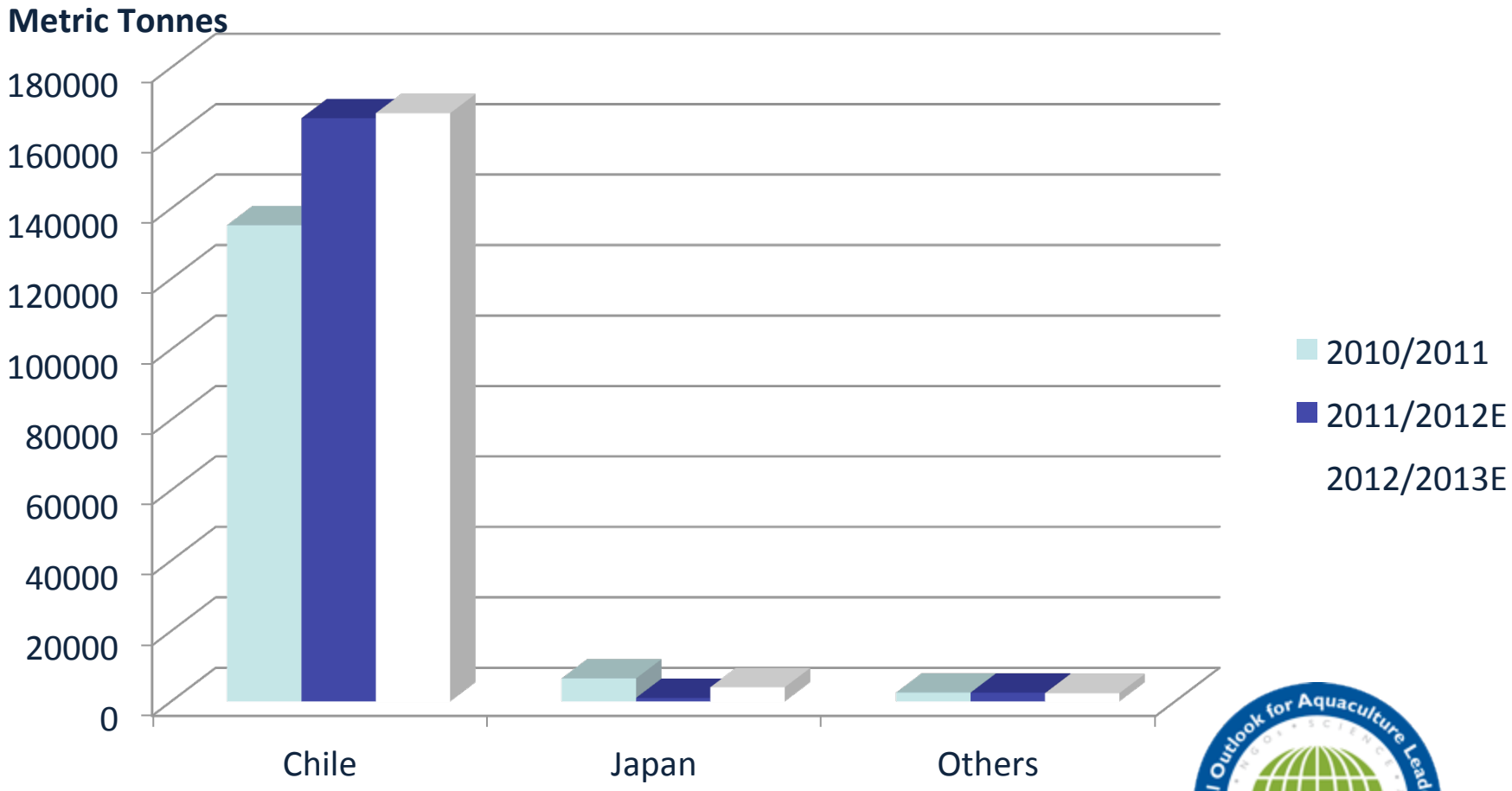
Total Production and Real Export Price on Chilean Coho Frozen Round



Sources: FAO , Kontali NSEC

Coho Salmon

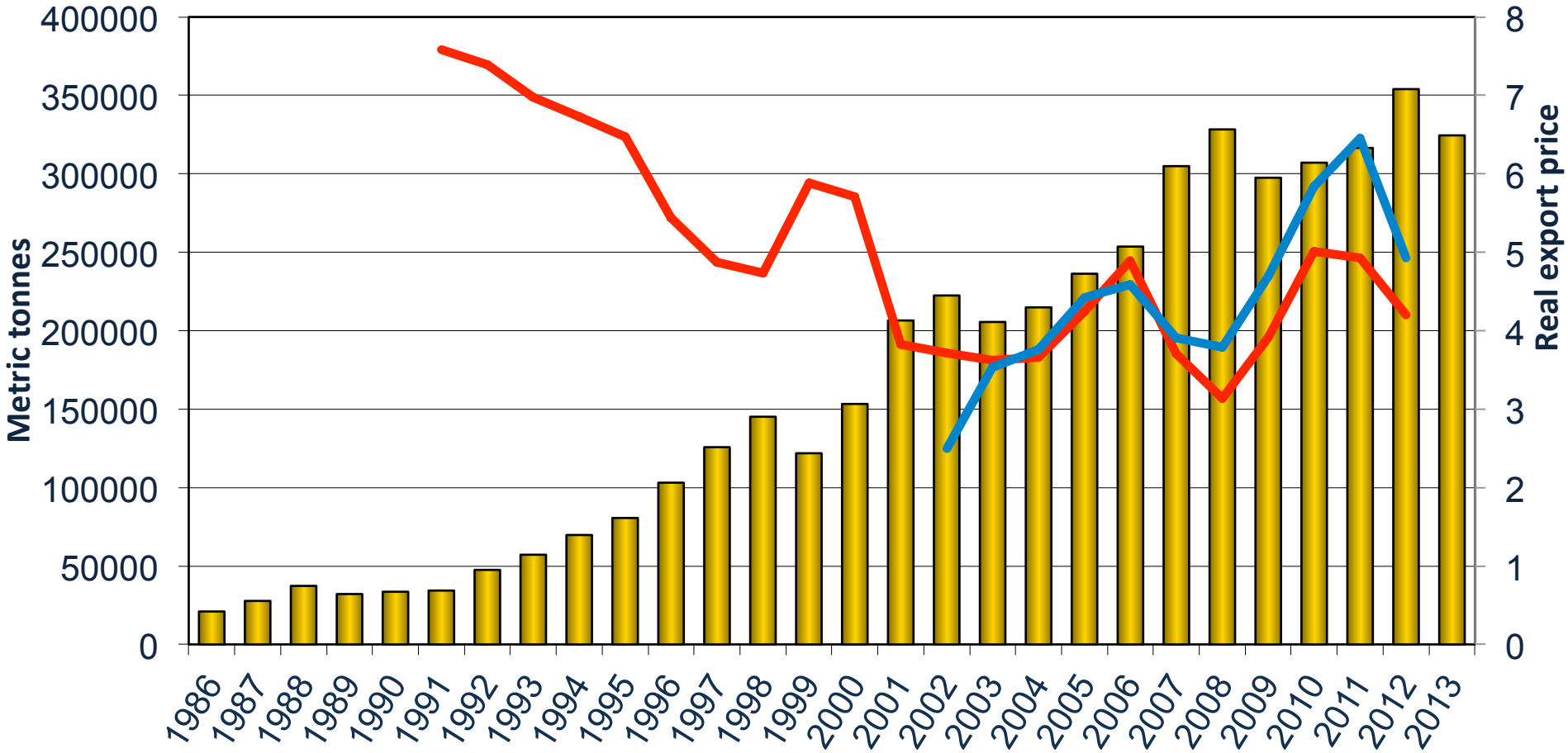
Farmed Production



Source: Kontali

Rainbow Trout

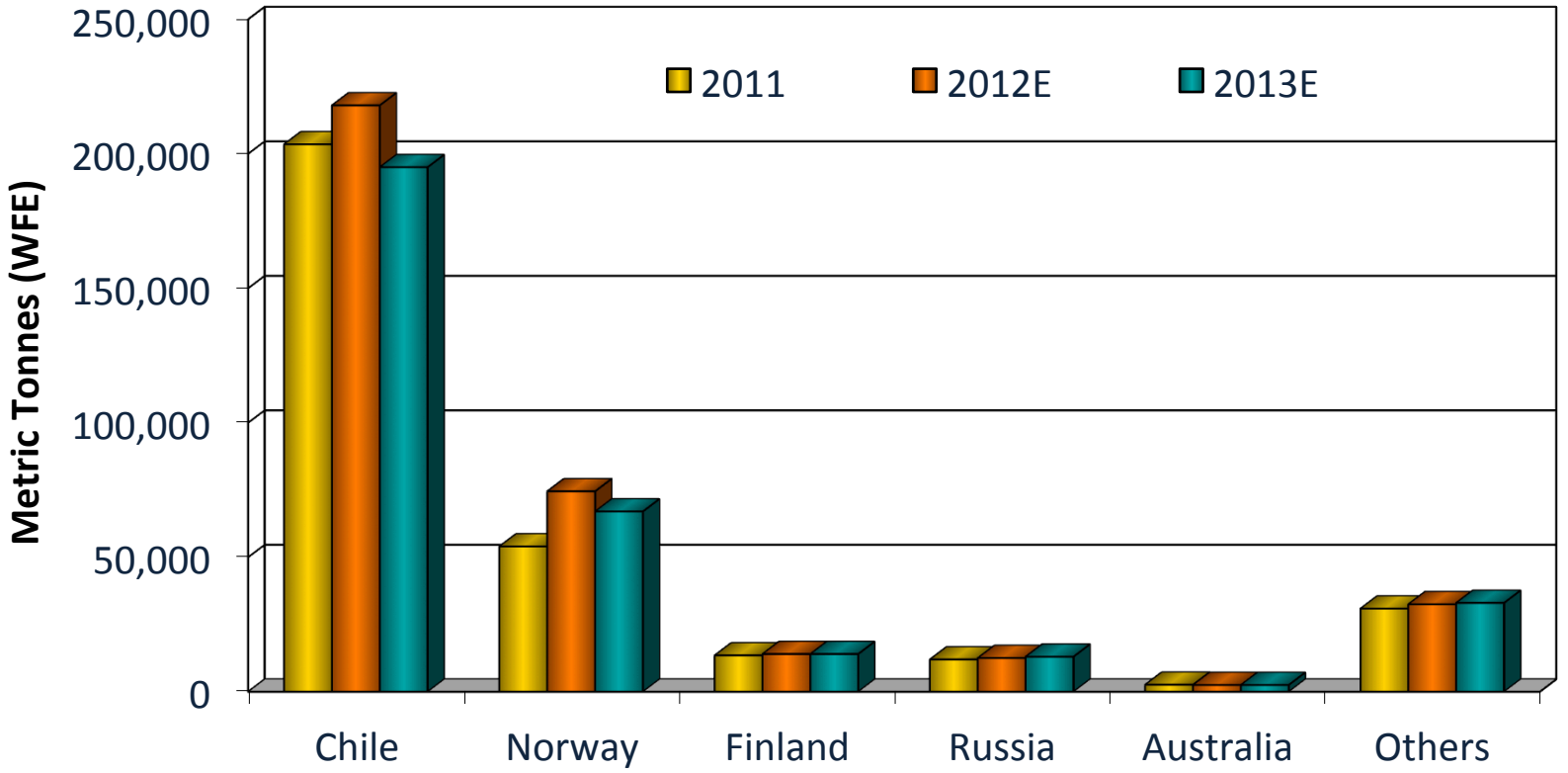
Total Ocean Farmed Production and Chilean frozen USD/kg (blue) and Norwegian fresh EUR/kg (red) real export prices



Sources: FAO, Kontali, NSEC. Note: Prices are annual averages except 2012 (January-August average).

Rainbow Trout

Production



Source: Kontali

Pangasius

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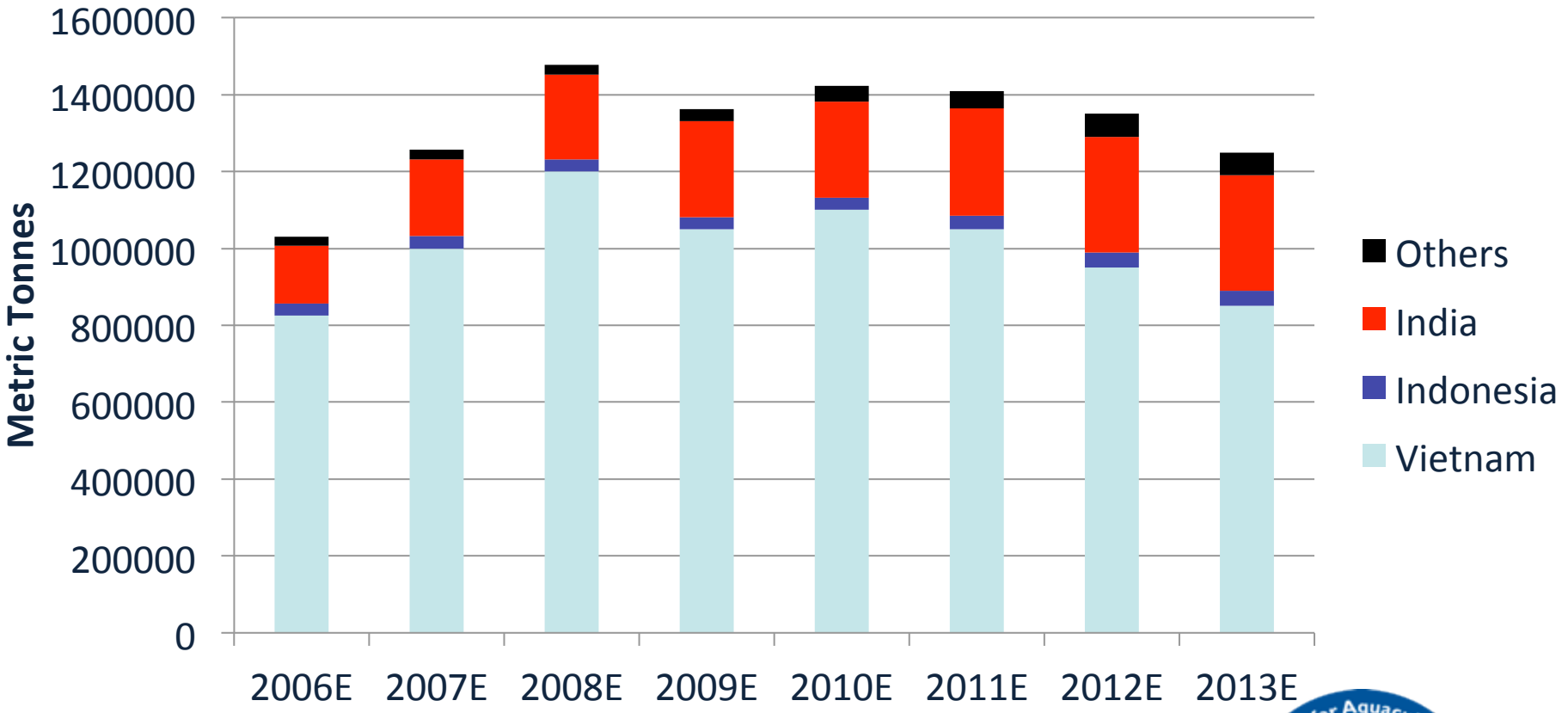
Pangasius

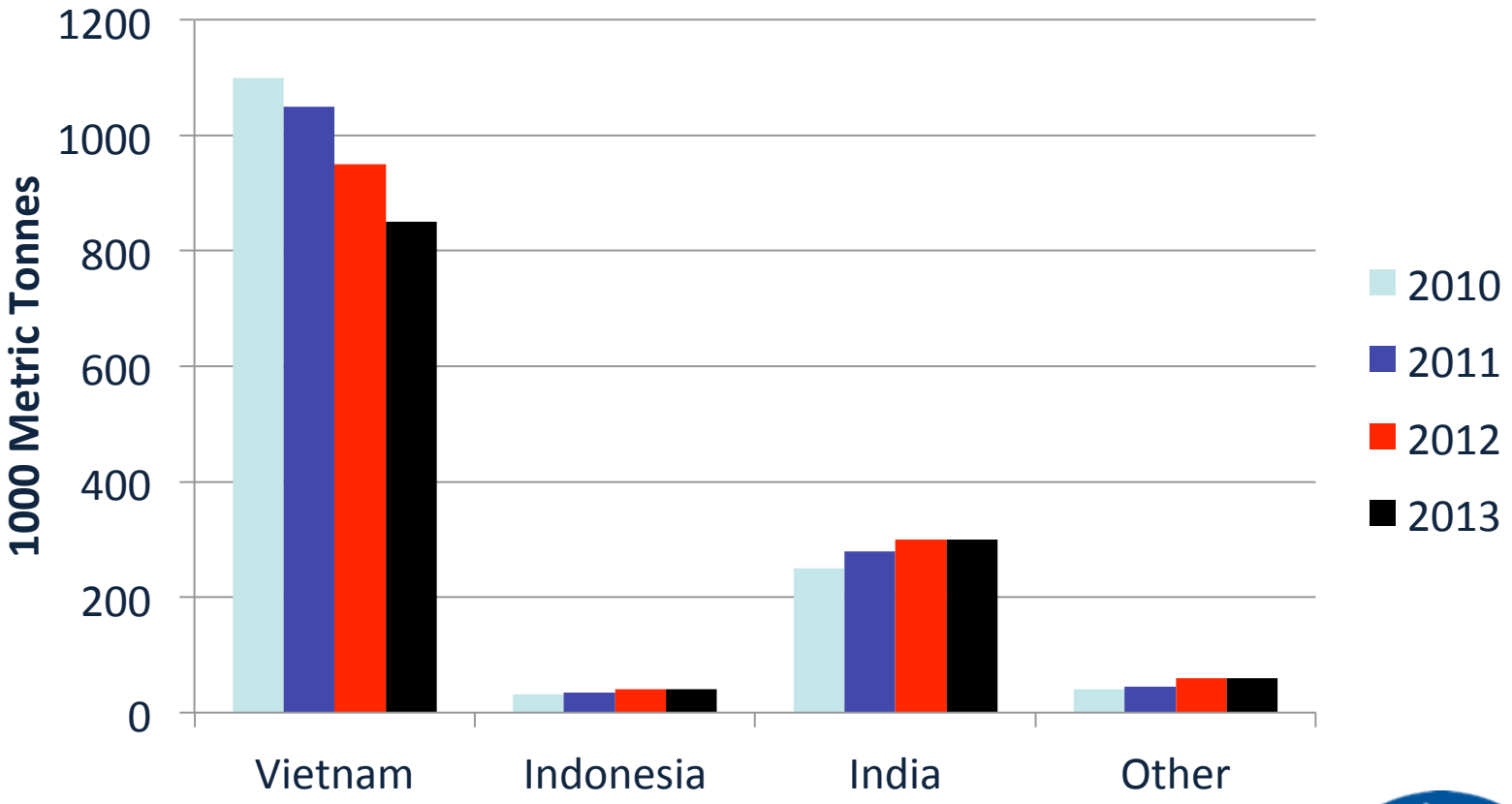
Production in selected countries



Sources: Kontali

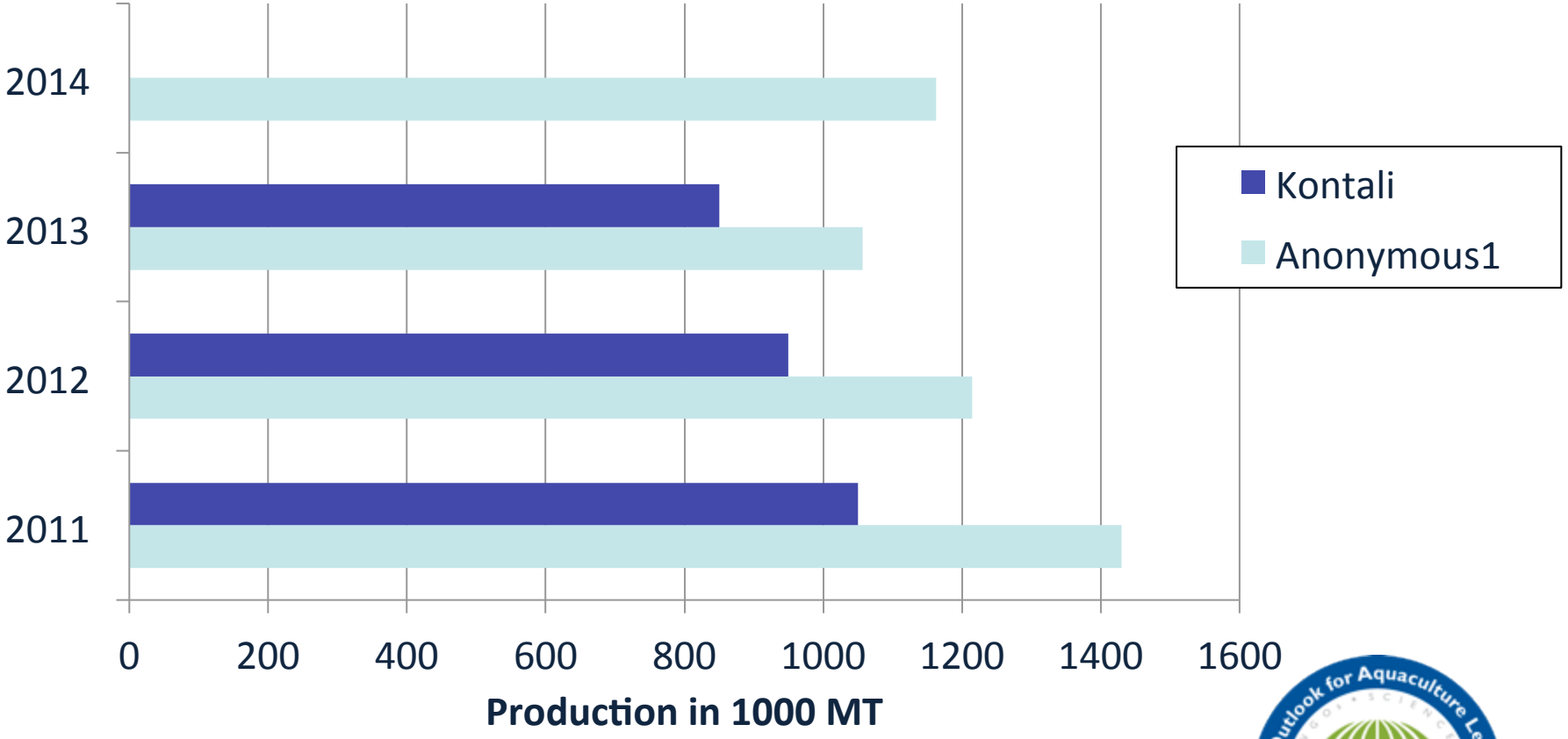
Pangasius

Production by country



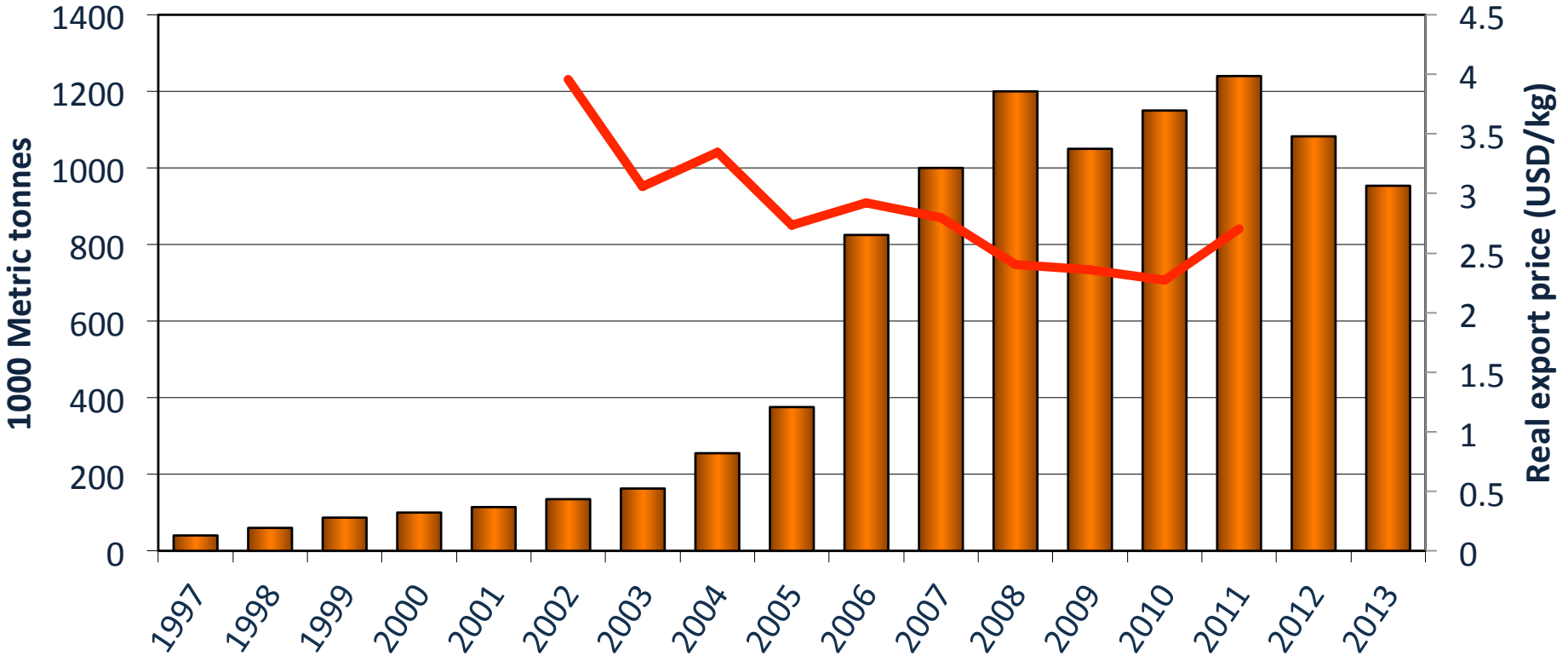
Sources: Kontali

Pangasius, Vietnam
Estimates From Two Sources



Pangasius

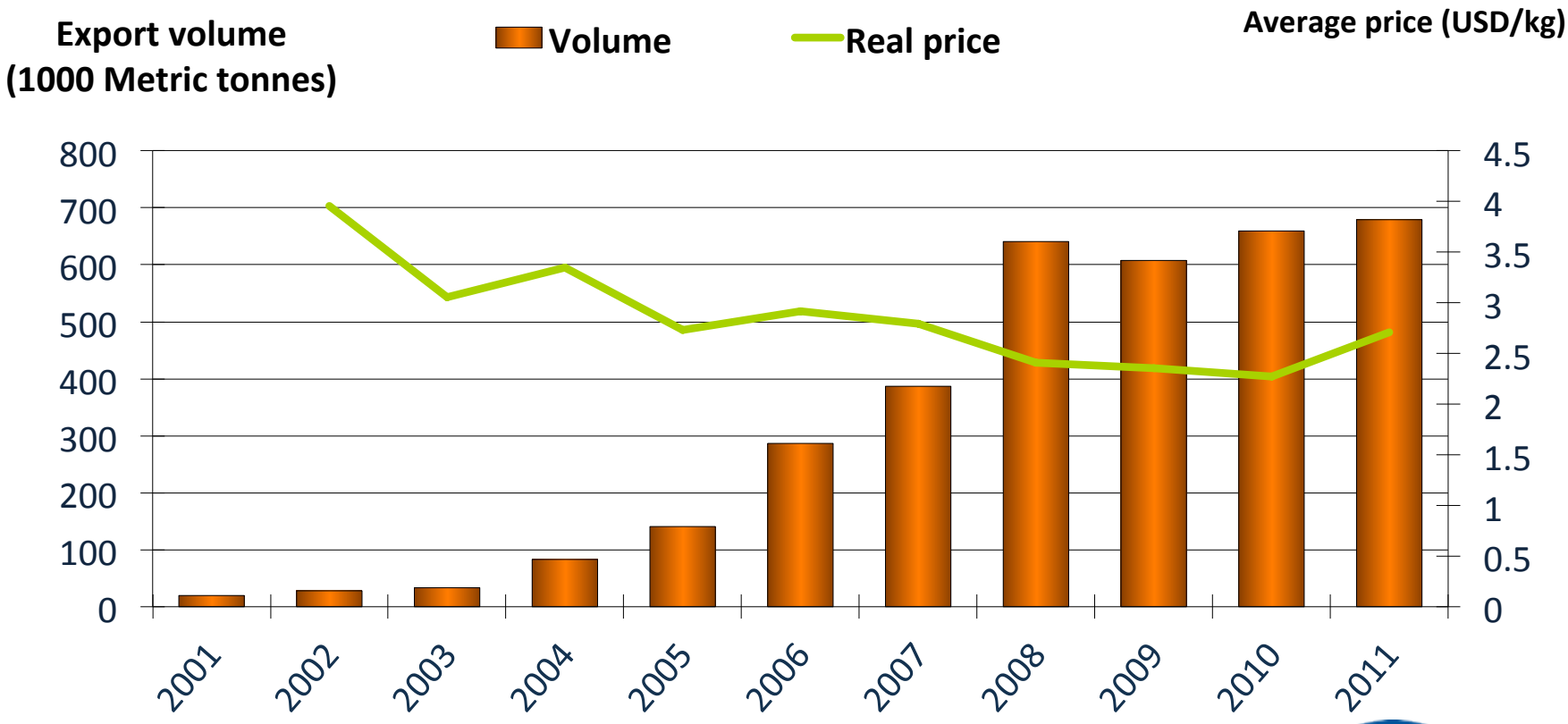
Production in Vietnam



Sources: FAO (1997-2009), Kontali and VASEP (2010), Kontali and anonymous (2012-2013)

Pangasius

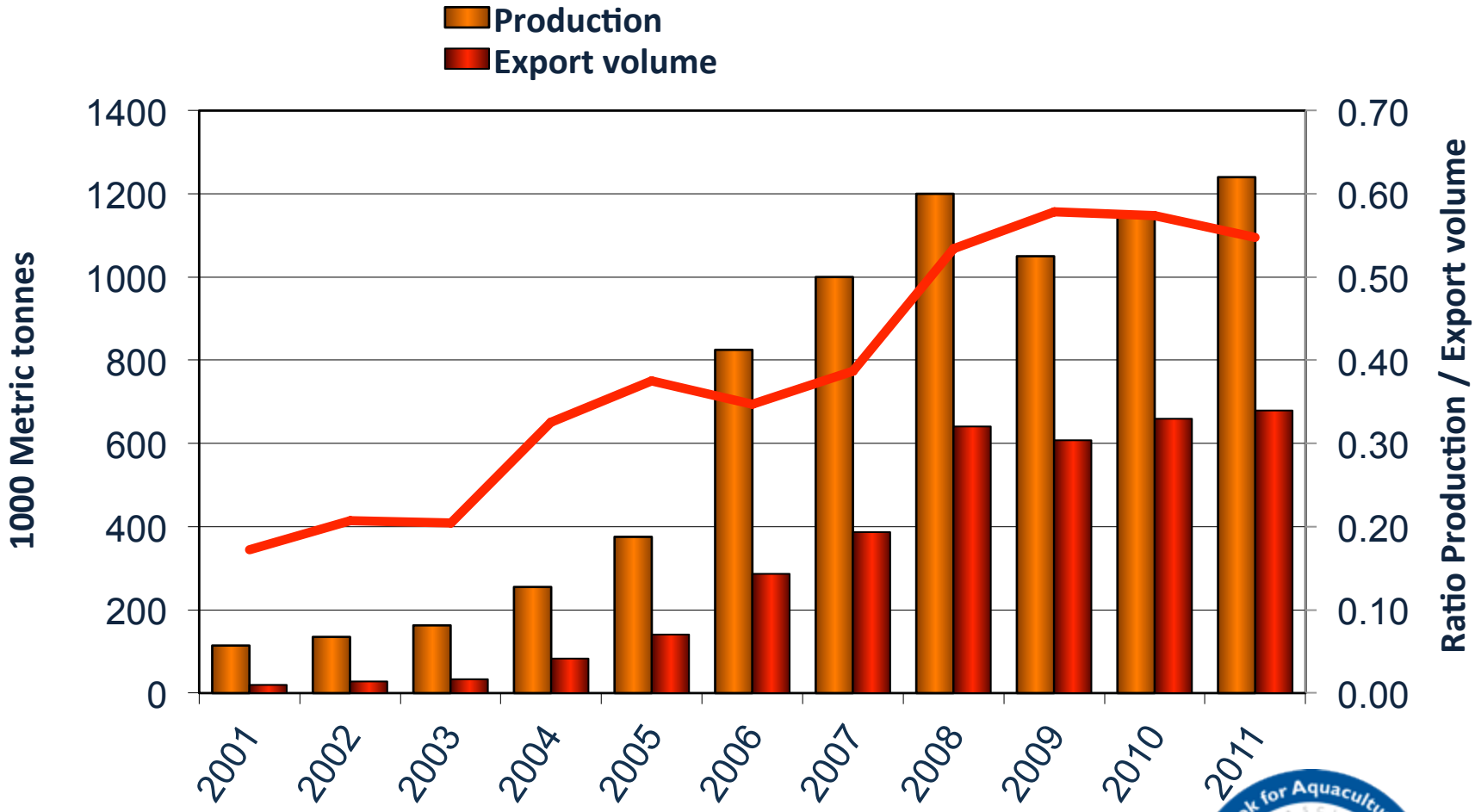
Vietnam Export Volume & Average Price



Source: FAO, Vietnam Association of Seafood Exporters & Producers (VASEP)

Pangasius

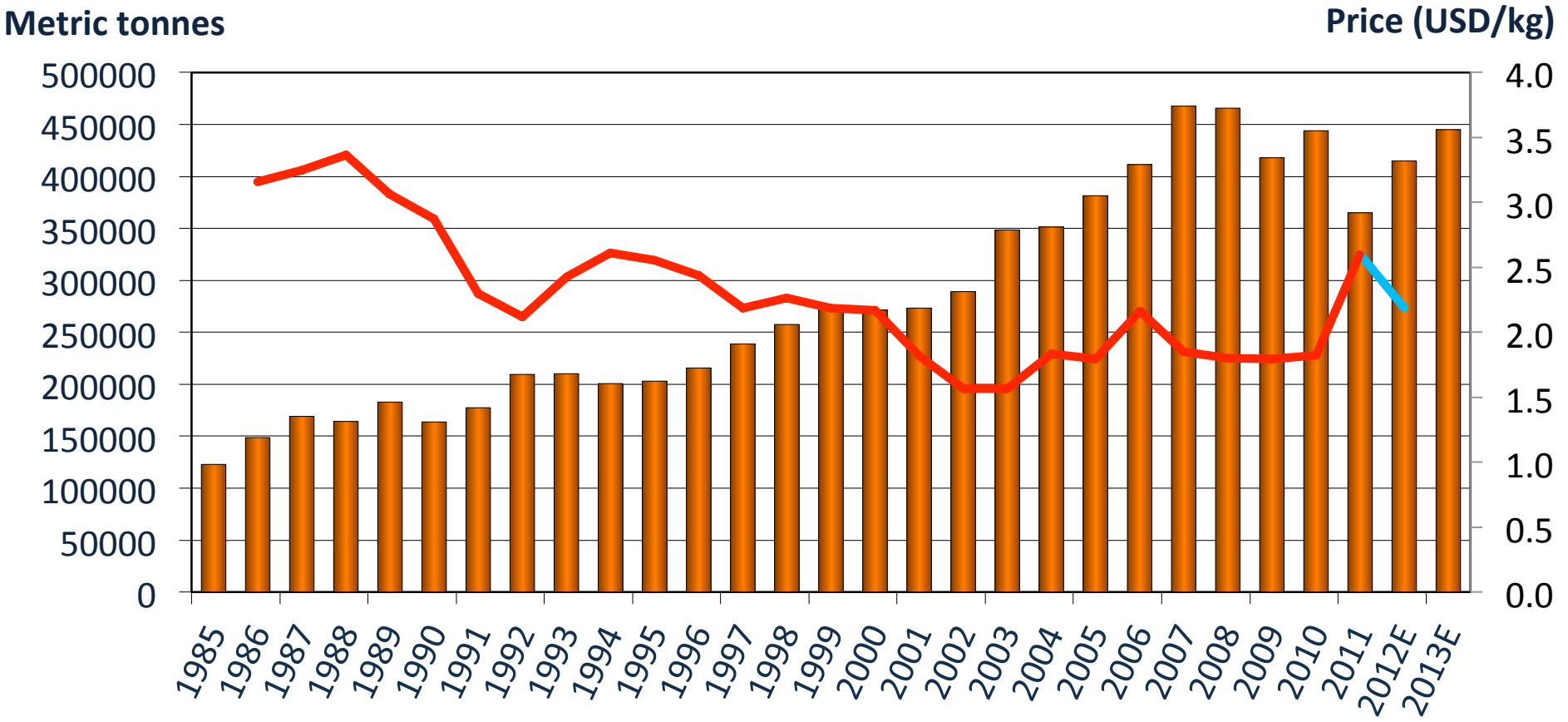
Relationship between production and export estimates



Sources: Vietnam Association of Seafood Exporters & Producers (VASEP), Kontali, FAO/Globefish, Anonymous.

Channel Catfish

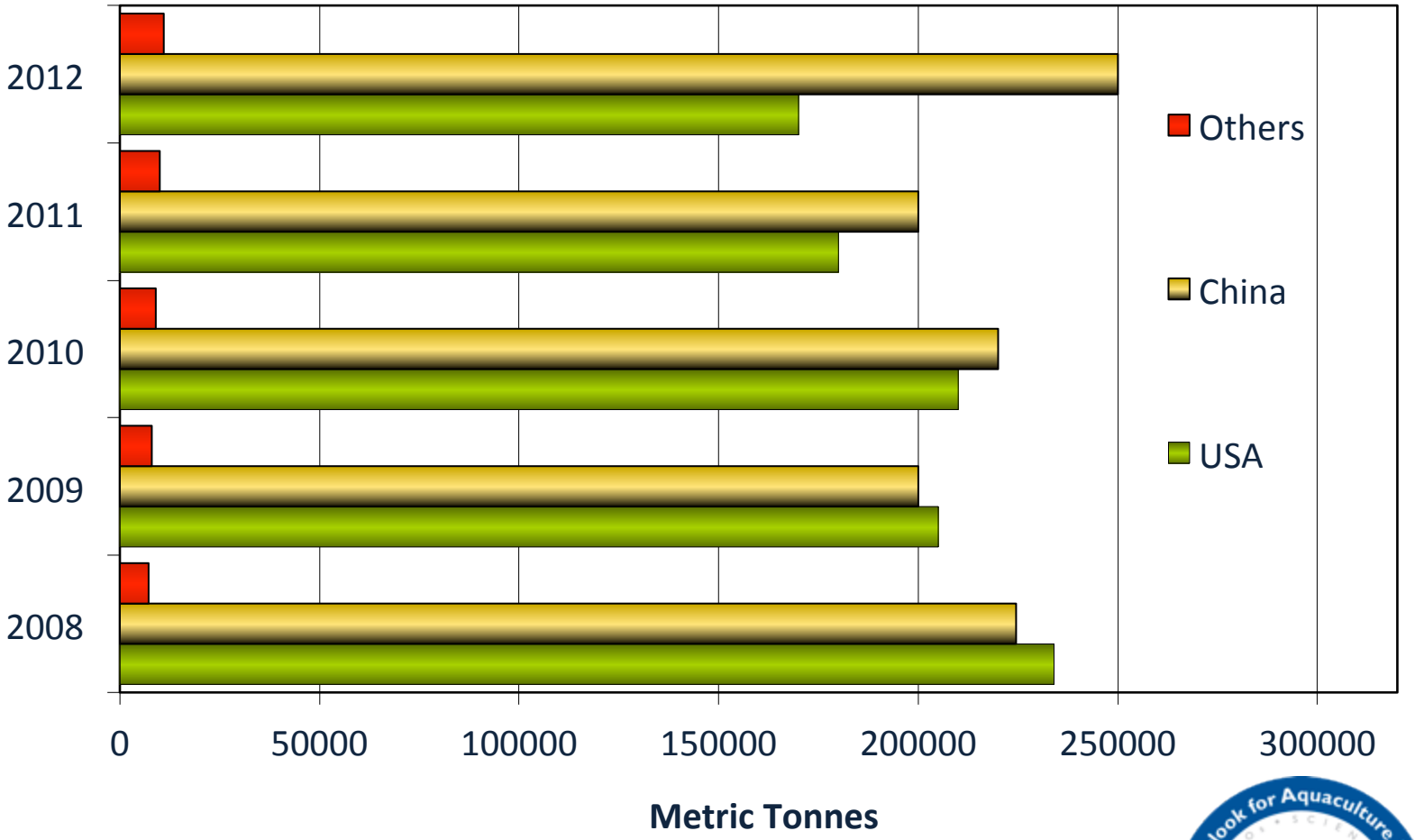
Total Global Production and Real Price U.S.



Sources: FAO, Kontali, USDA/NASS (prices). Note: Prices 1986-2011 are annual averages, price in 2012 is Jan.-Sep. average.

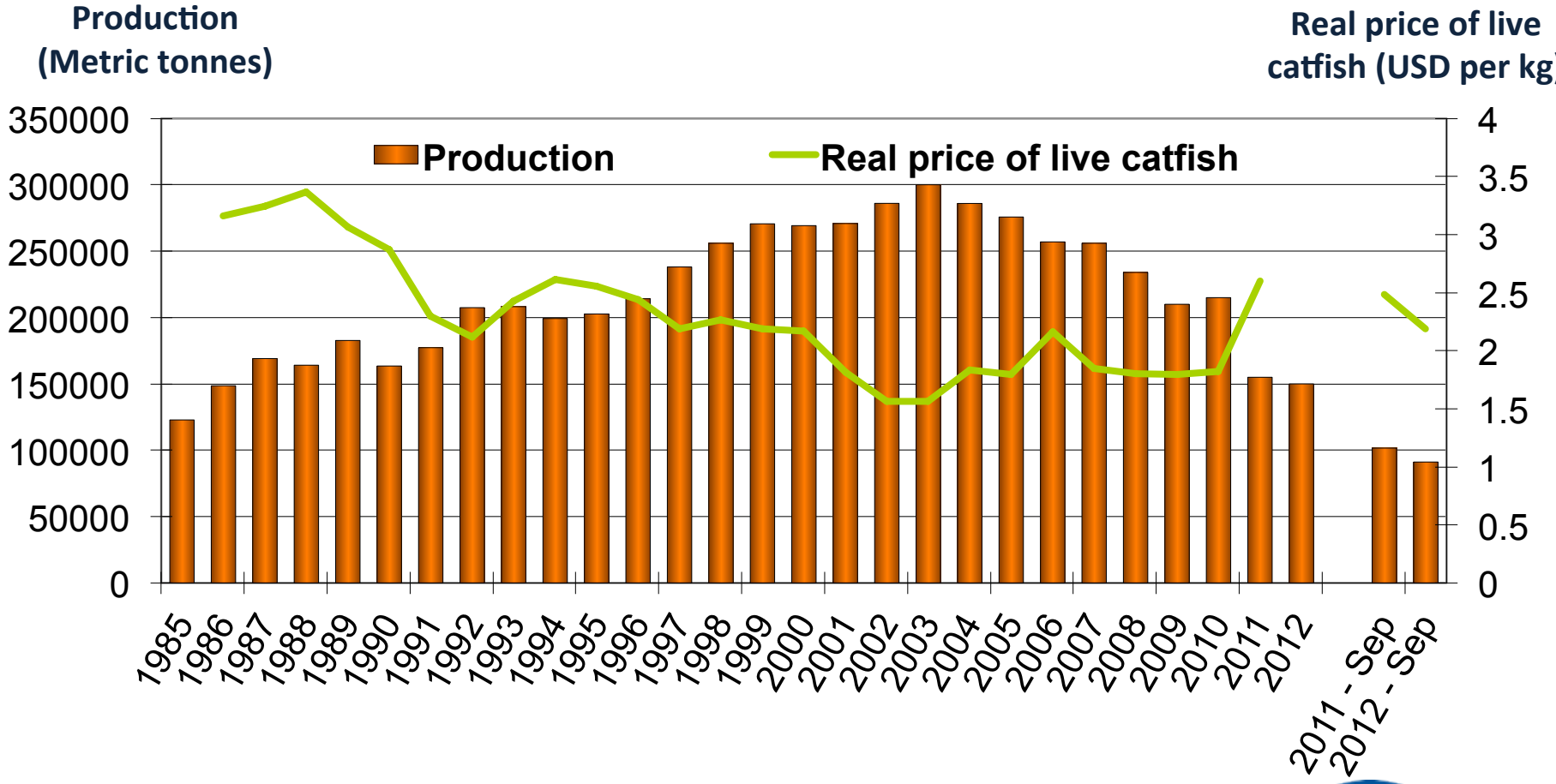
Channel Catfish

Production by Country



Source: FAO, Kontali

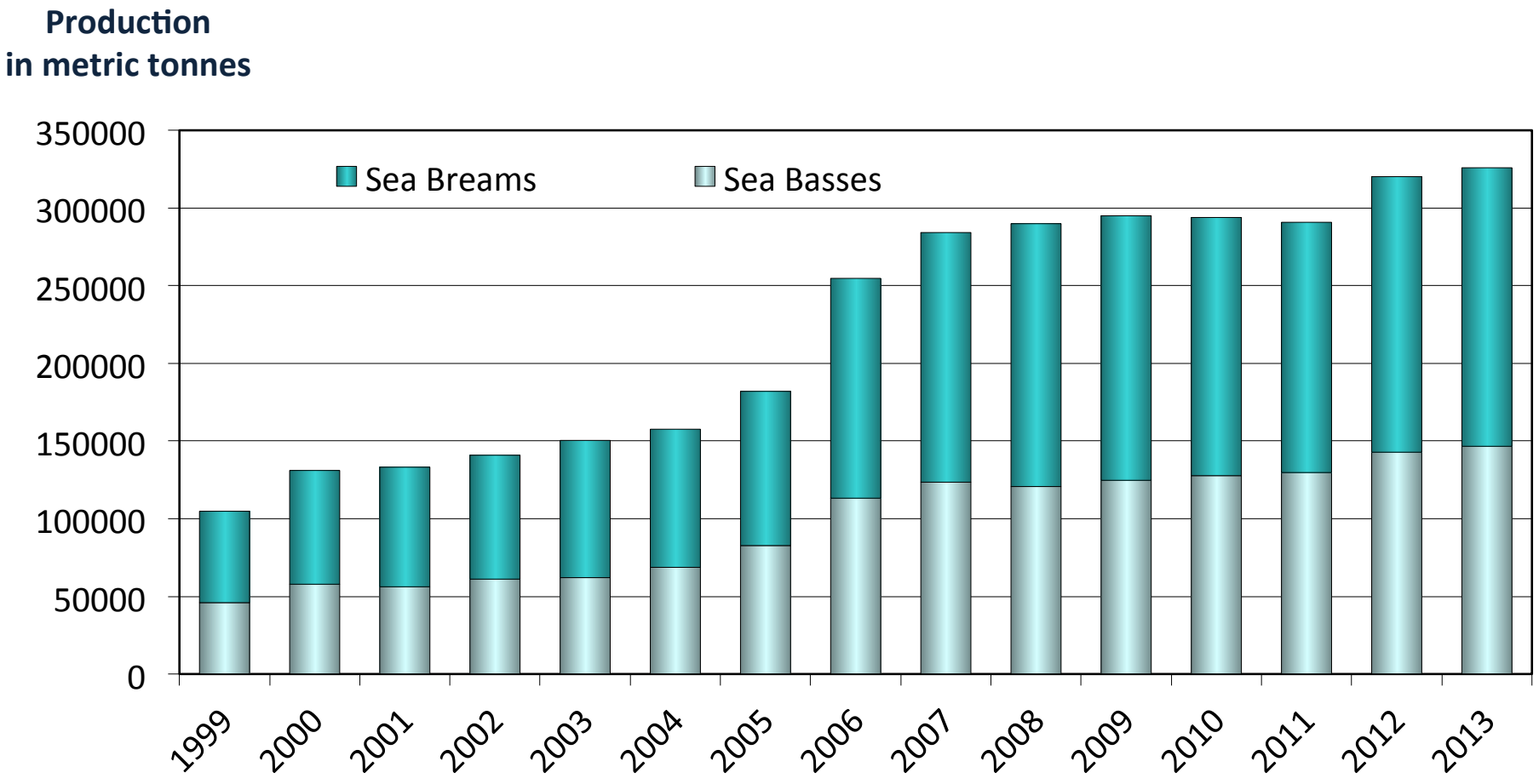
Channel Catfish
U.S. Production and Real Price



Sources: FAO, Kontali, USDA/NASS

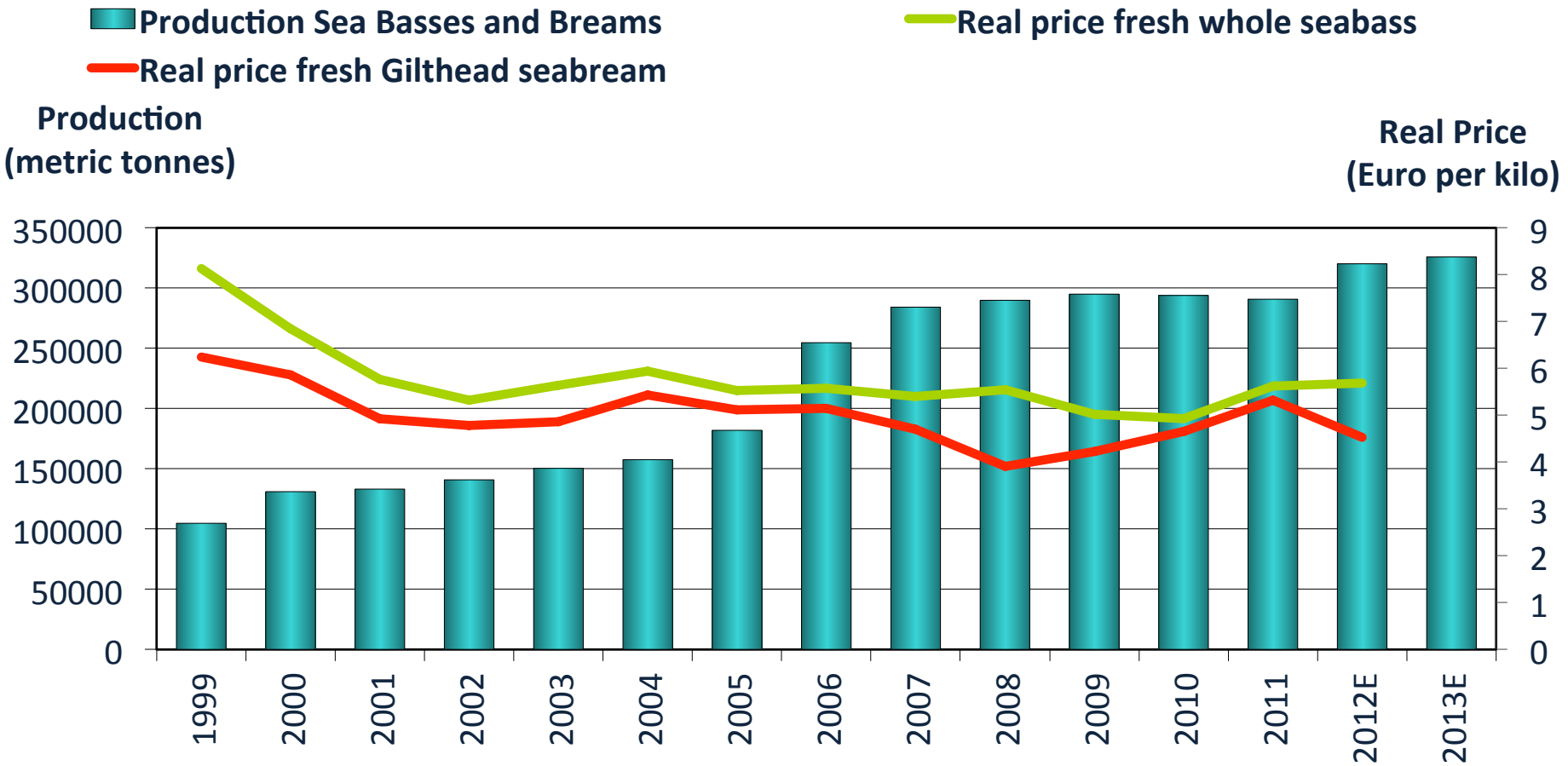
Seabass & Sea Bream

Mediterranean Production



Source: FEAP, Kontali (2006-2013)

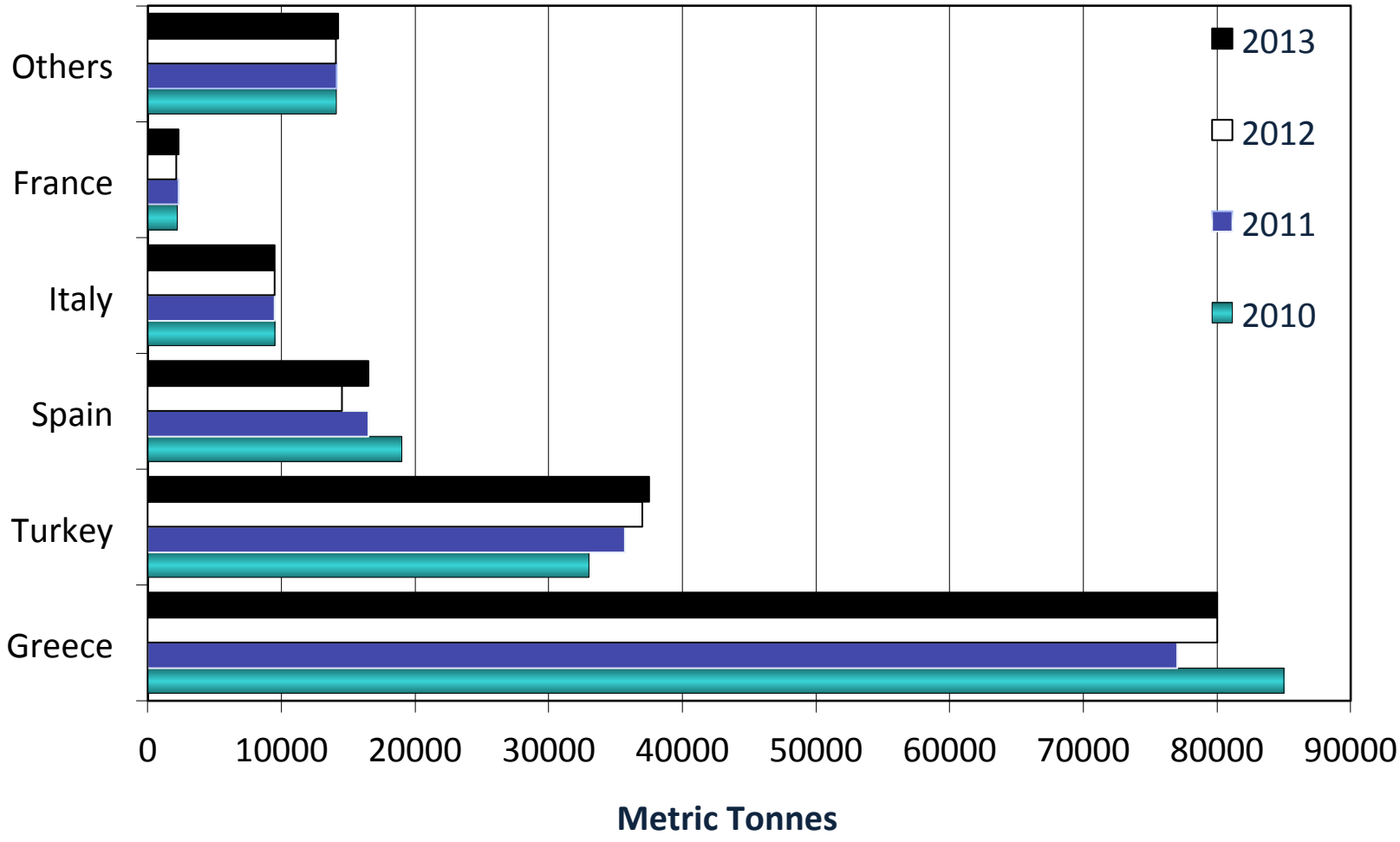
Seabass & Sea Bream
European Production & Real Italian Import Price



Source: FEAP, Kontali, Eurostat

Sea Bream

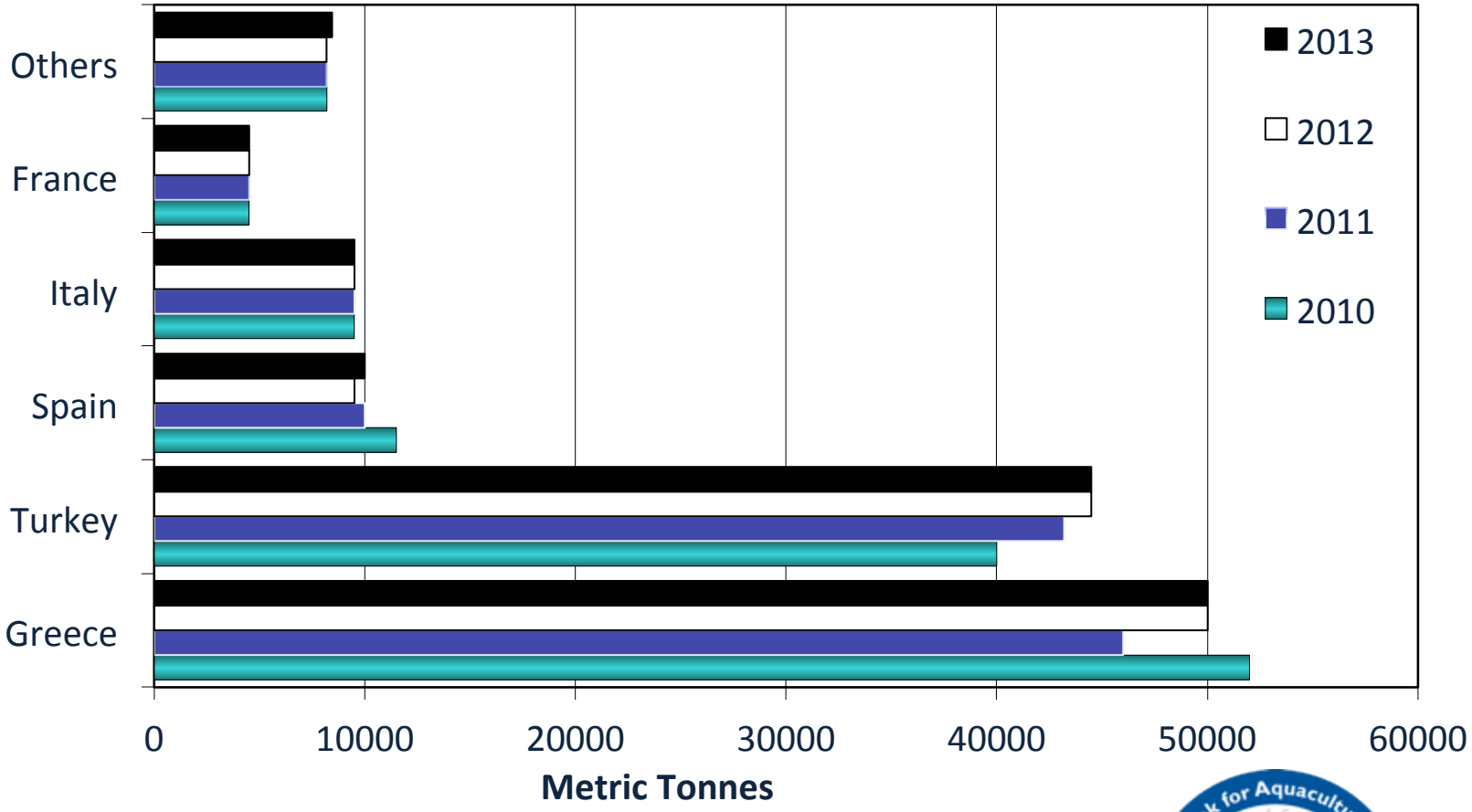
Seabream
Production in Mediterranean Countries



Source: Kontali

Seabass

Seabass
Production in Mediterranean Countries

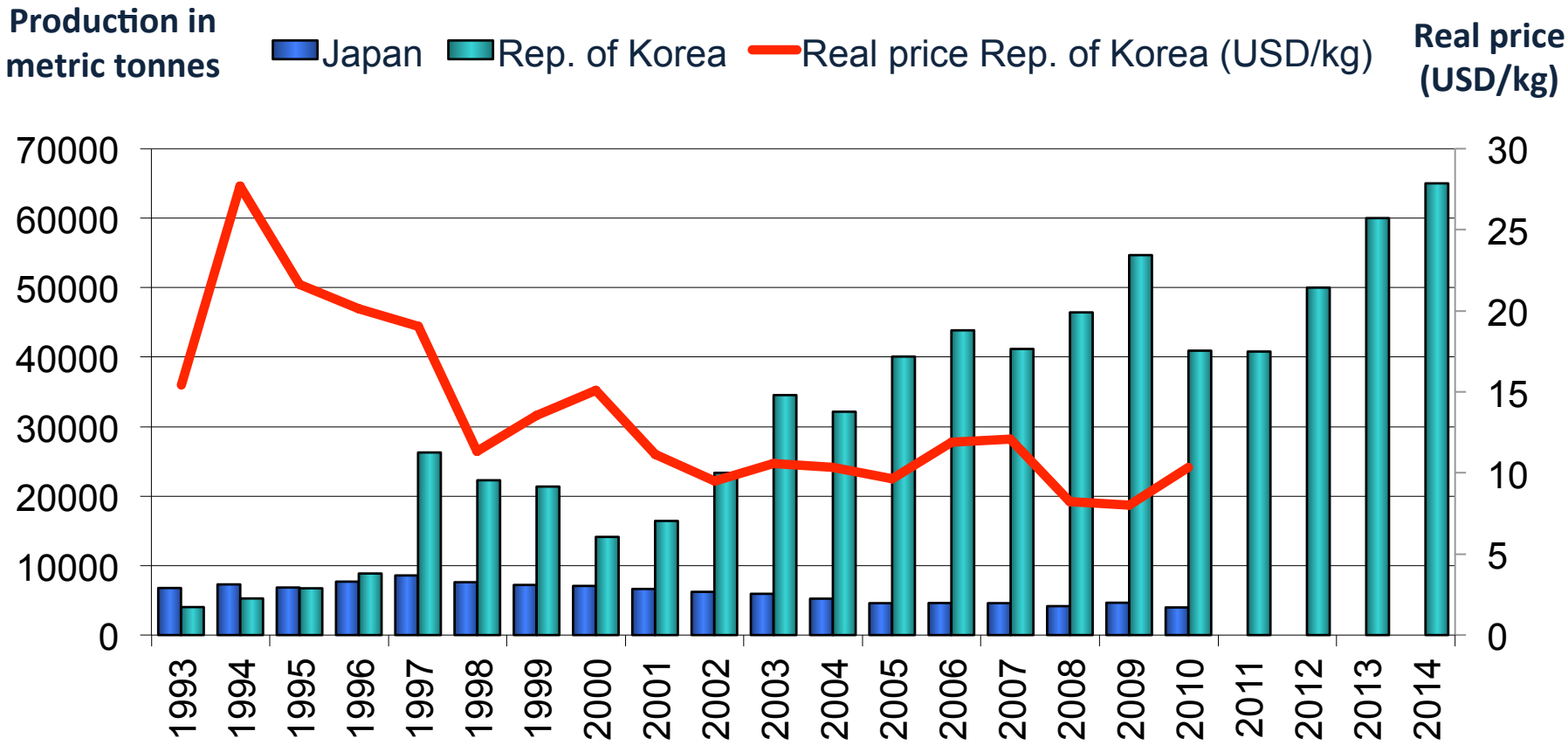


Source: Kontali

Flatfishes

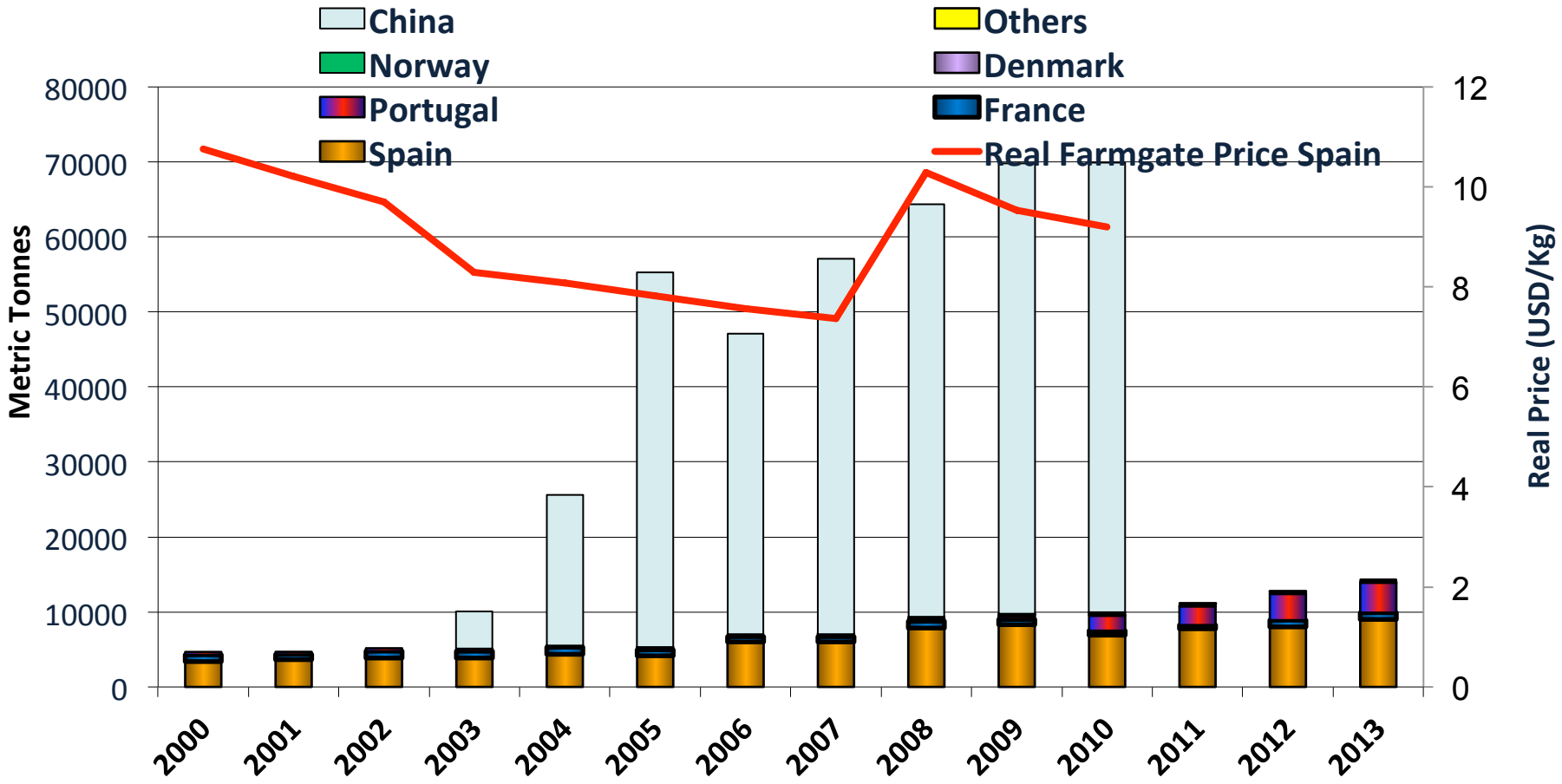
HADDOCK
FILLETS
AQUANOR
FARMED
ATLANTIC HALIBUT
Farm-Raised
Product of Canada

Olive Flounder
Production and real farmgate price



Sources: FAO (1993-2009), Dr. Sungchul C. Bai (2010-2013)

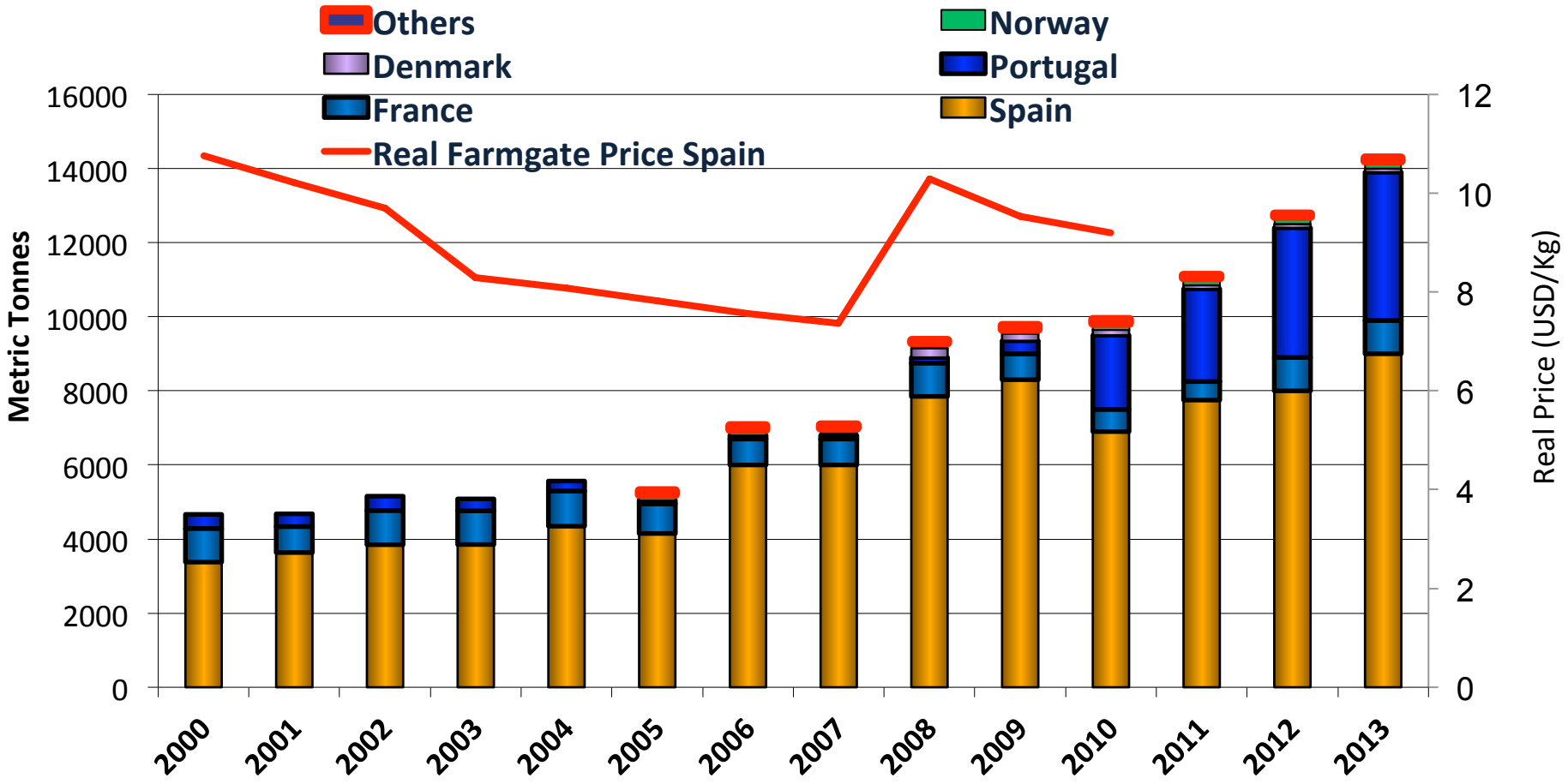
Turbot
Production in selected countries



Sources: FAO, Kontali.

Turbot

Production in selected countries excl. China



Sources: FAO, Kontali, and anonymous source for Chile

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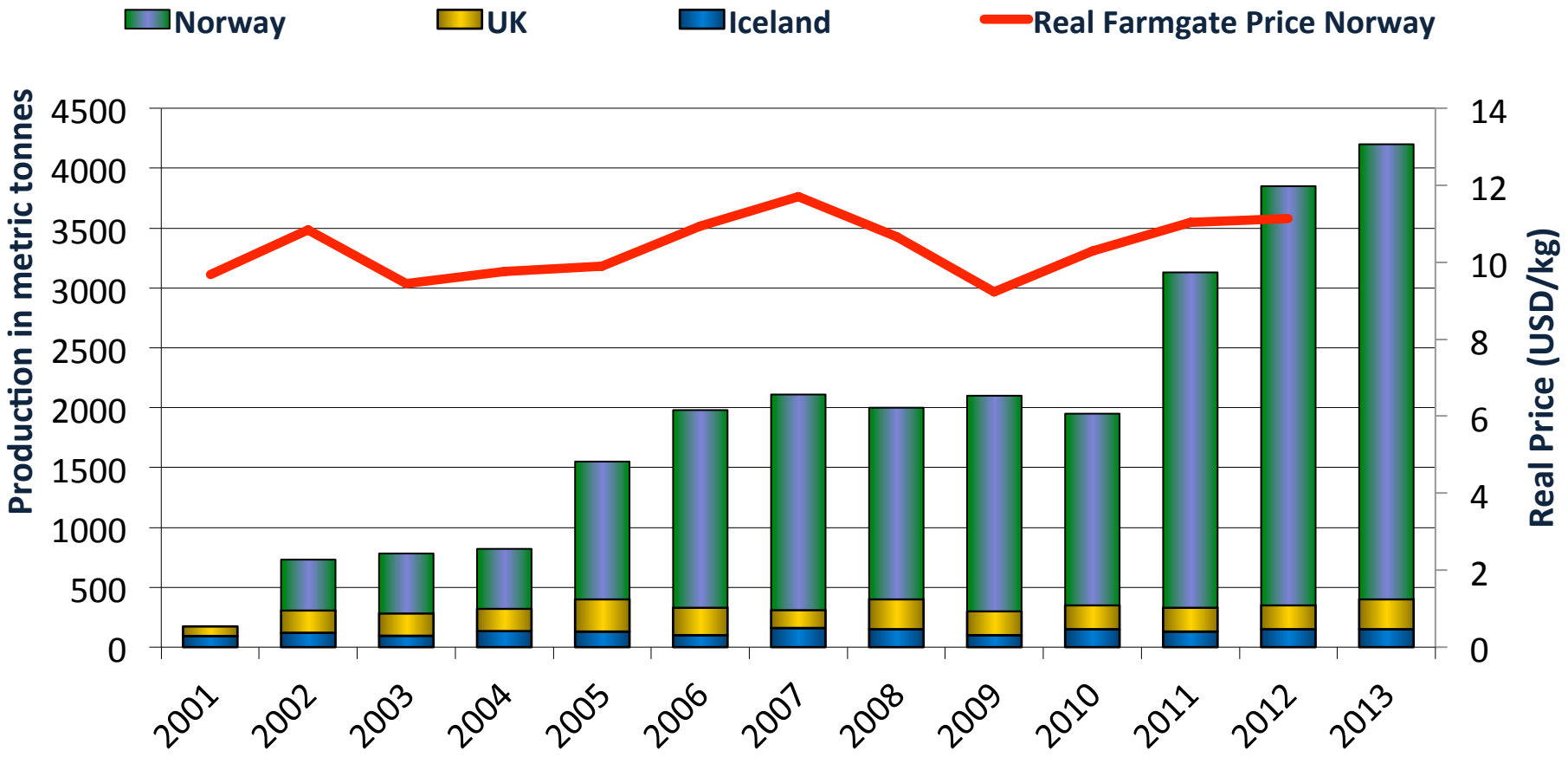
Atlantic Halibut
Production

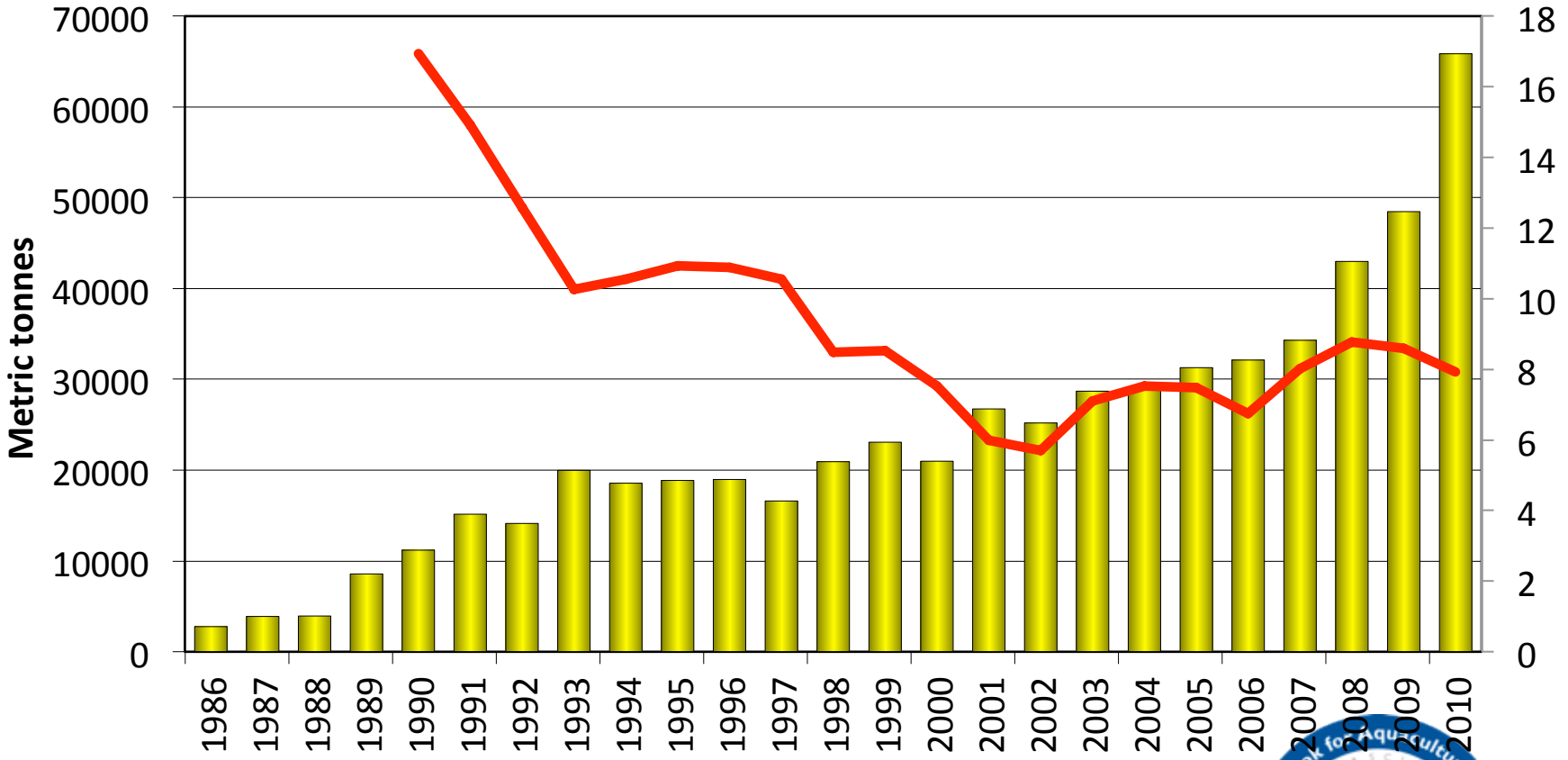


Source: FAO (2001-2004), Kontali (2005-2010), NSEC (prices). Note: Prices 2001-2011 are annual averages, price in 2012 is January-September average.

Barramundi

Barramundi

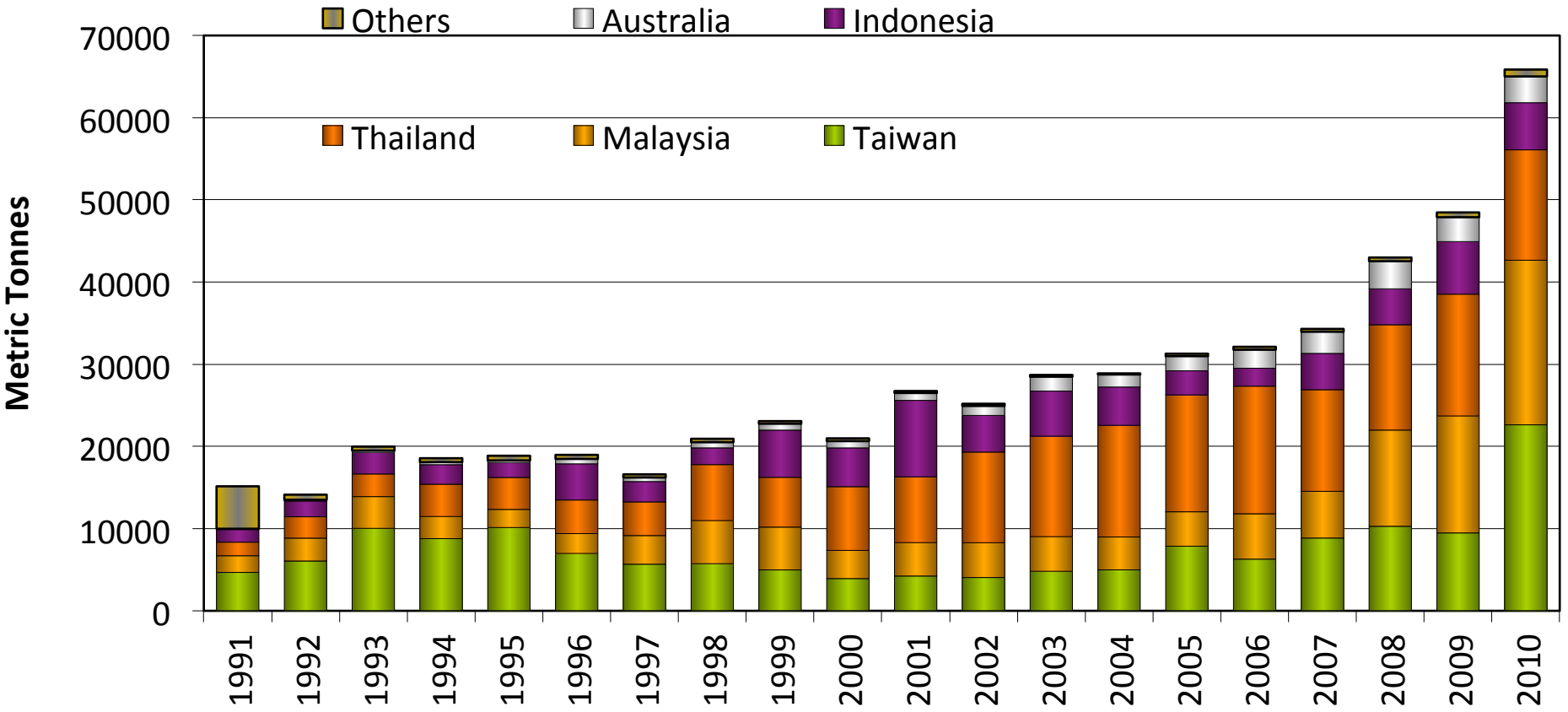
Total Production and Real Price Australia until 2010



Source: FAO

Barramundi

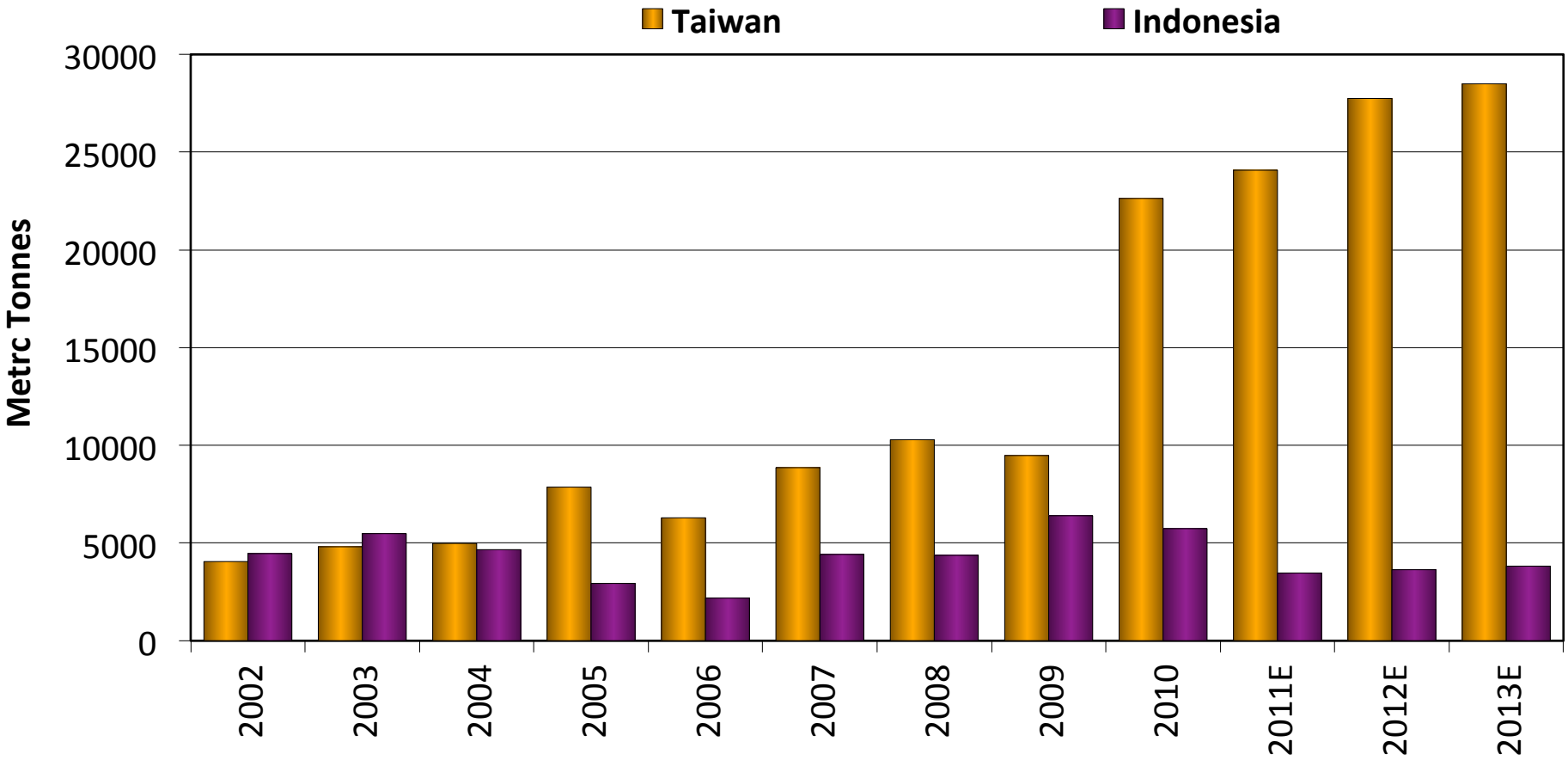
Total production by major producing countries



Source: FAO

Barramundi

Production forecasts for selected countries



Sources: FAO (2002-2010) and anonymous sources (2011-2013)

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Cobia

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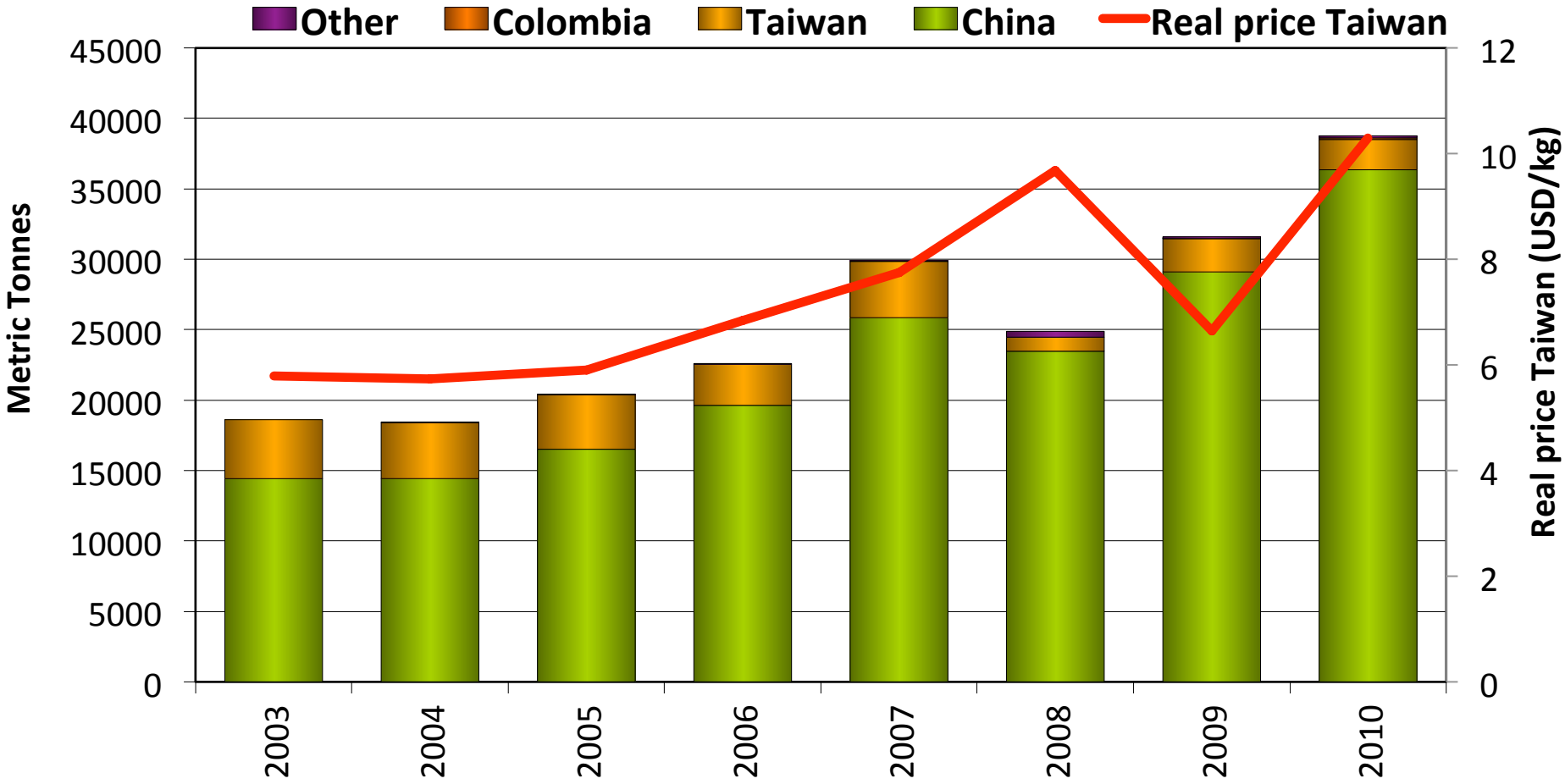
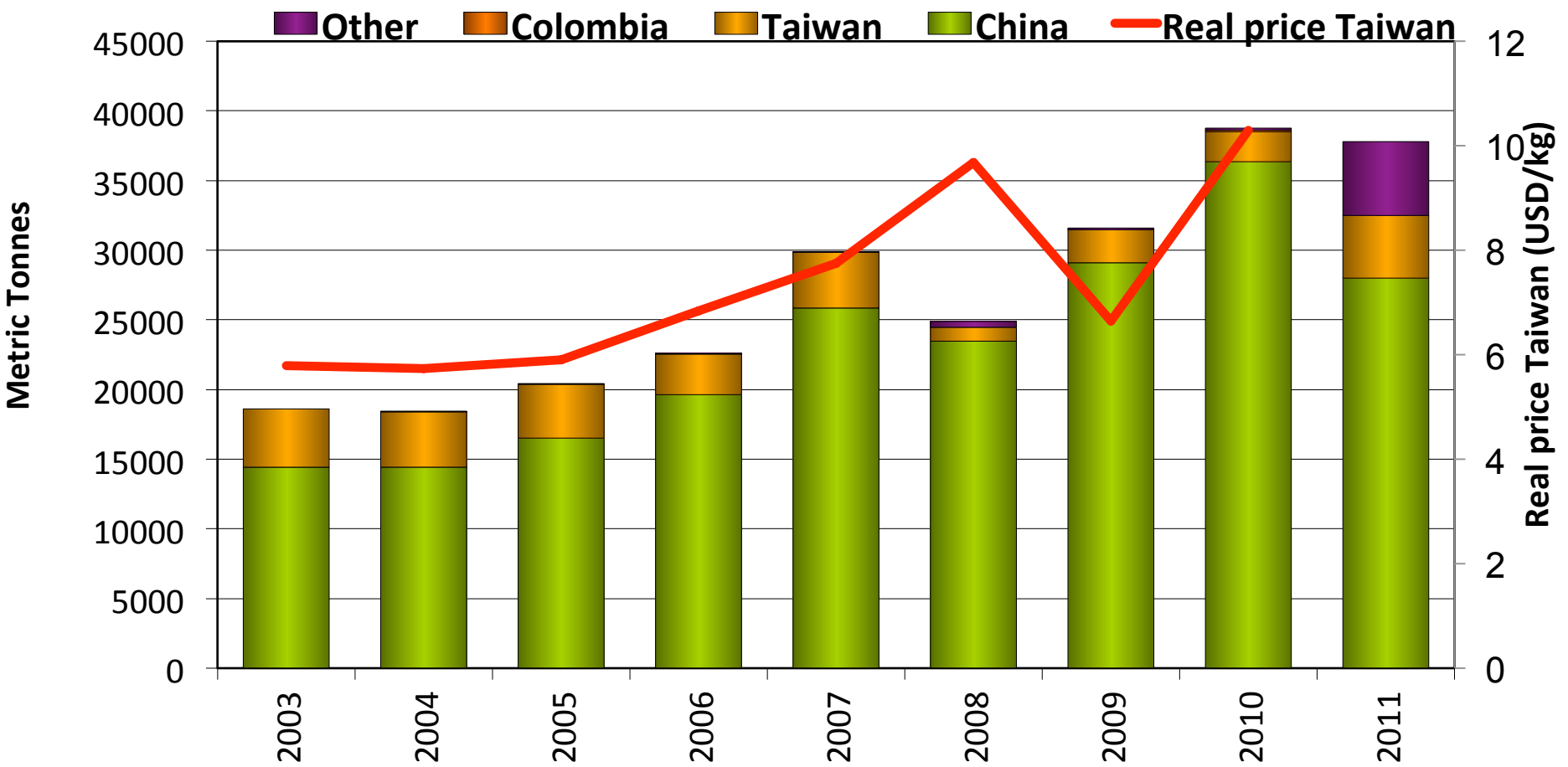
Cobia
Major Producing Countries until 2010



Source: FAO

Cobia
Major Producing Countries until 2011



Source: FAO (2003-2010) and Kontali (2011). Note: In 2011 "Other" includes Colombia.

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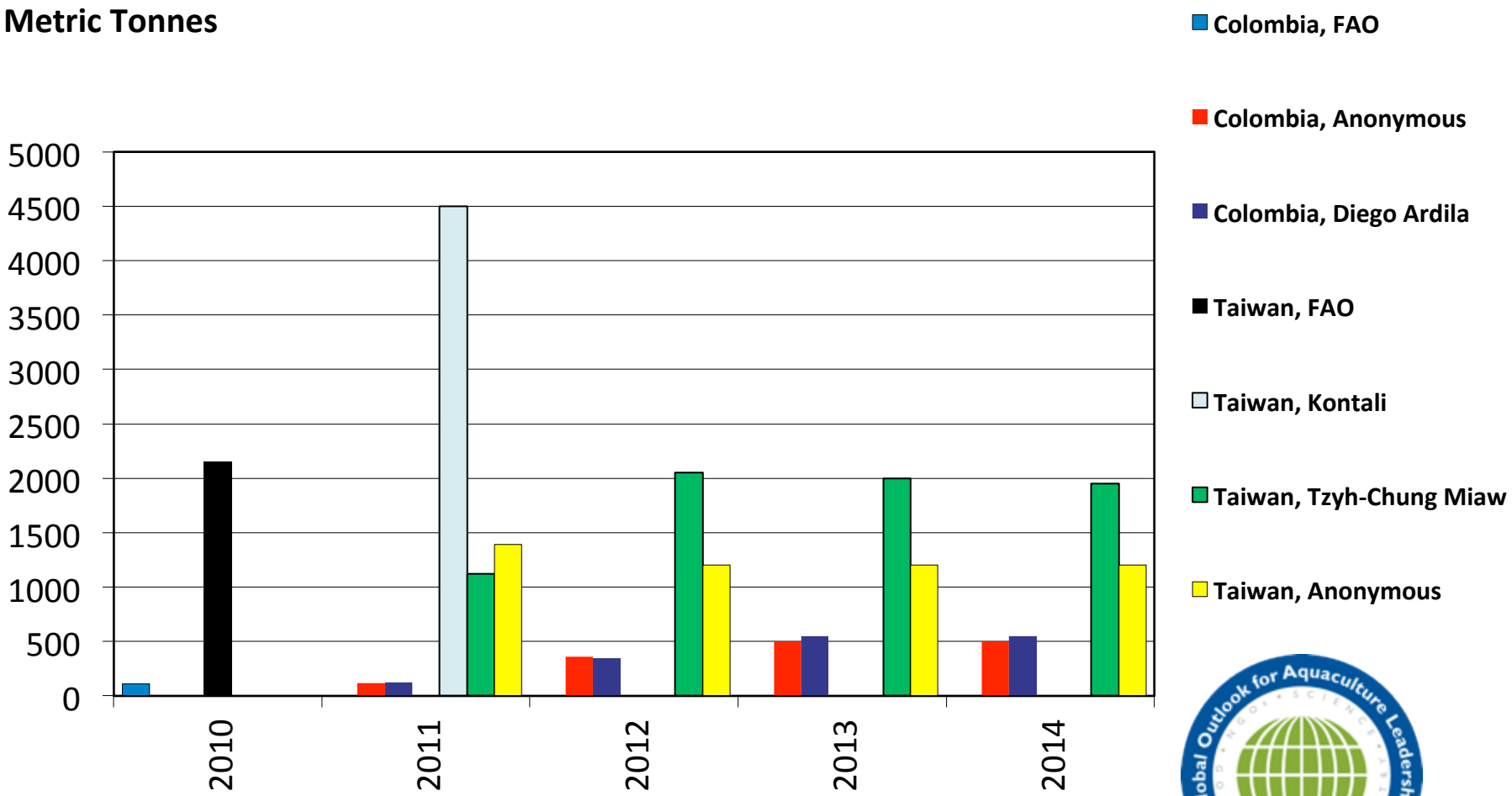
Farmed Cobia
Estimates for Taiwan and Colombia

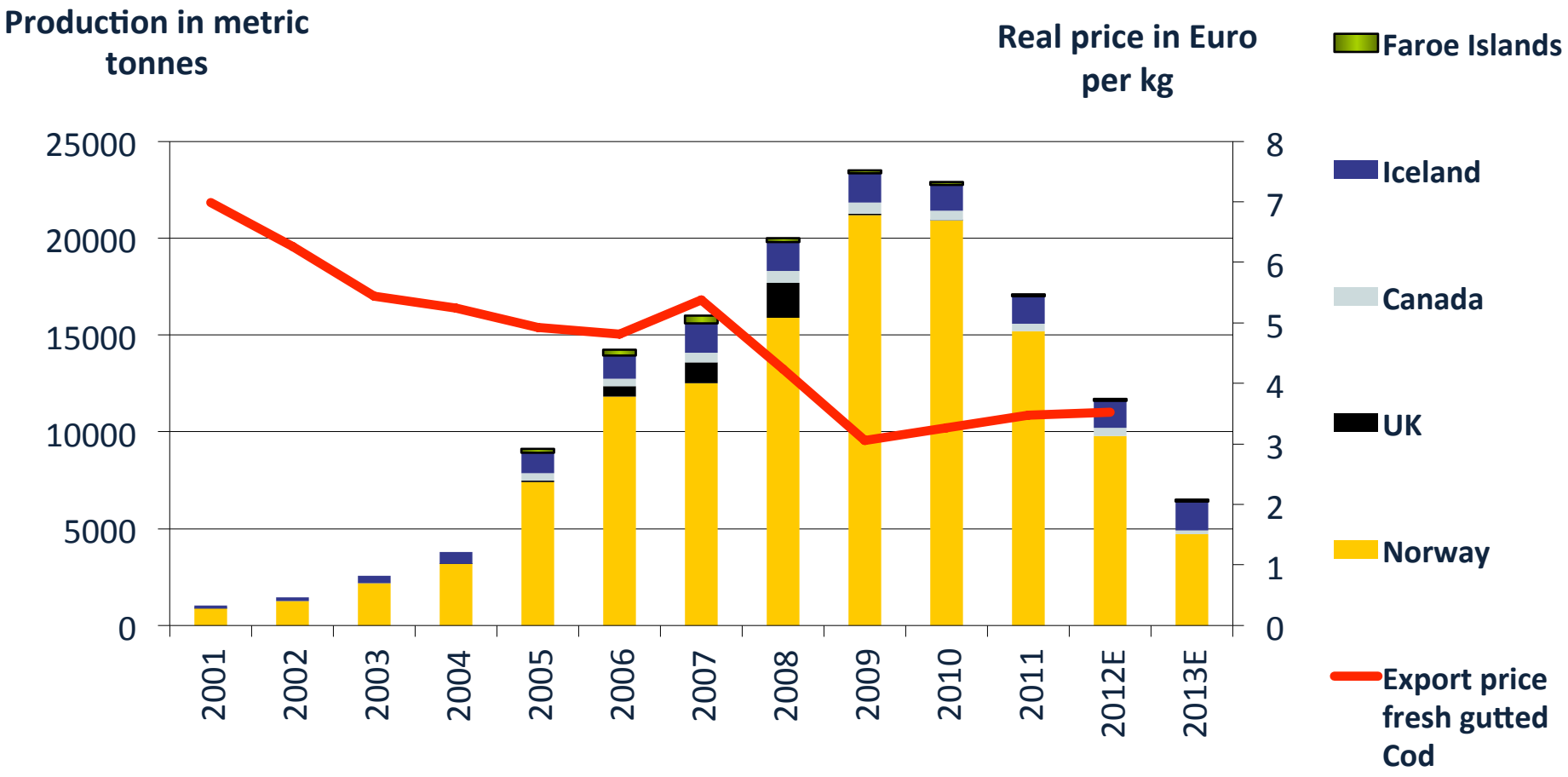


Source: FAO (2010), Various sources (2011-2013)

Atlantic Cod

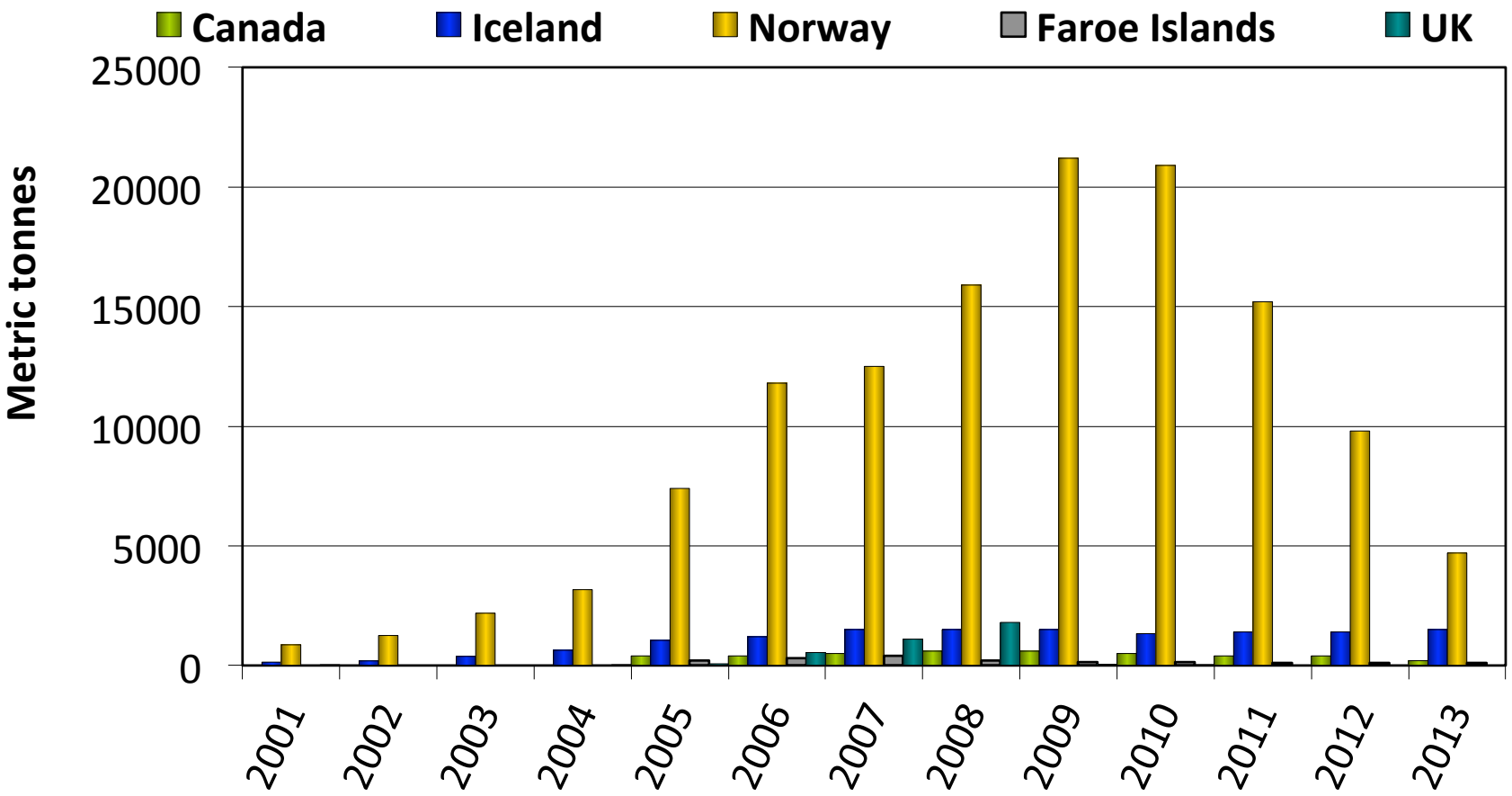
Atlantic Cod

Total Farmed Production and Norwegian Export Price



Sources: Norwegian Directorate of Fisheries (1989-2004), Kontali (2005-2013), Norwegian Seafood Export Council (Prices) . Note: Prices 2001-11 are annual averages, price in 2012 is Jan-Aug average.

Atlantic Cod
Farmed Production by Country

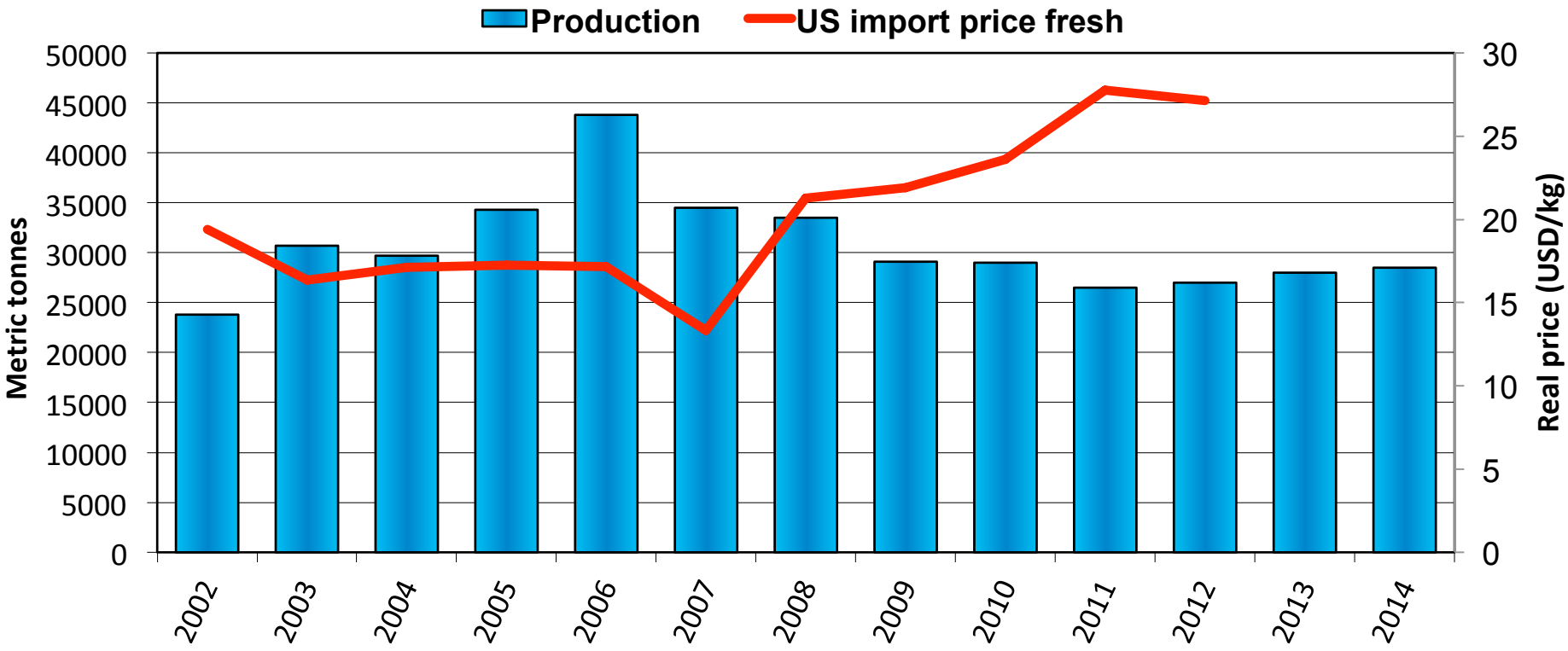


Source: FAO (-2004) and Kontali (2005-2013)

Tunas

Bluefin Tuna

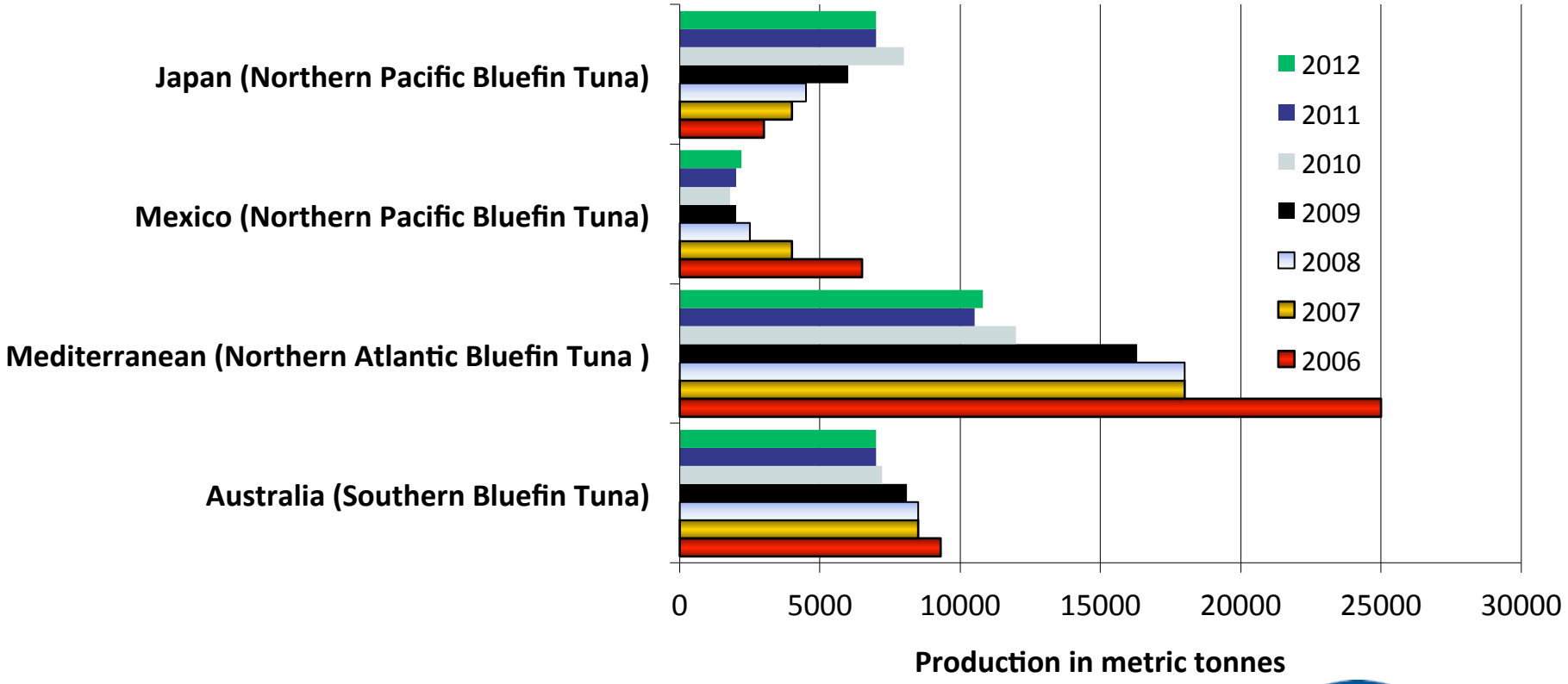
Total Production and US real import price fresh



Sources: Production - Apostolos Tzoumas; import price- NMFS.

Note: Prices 2002-2011 are annual averages, price in 2012 is January-August average.

Bluefin Tuna
Production by Region

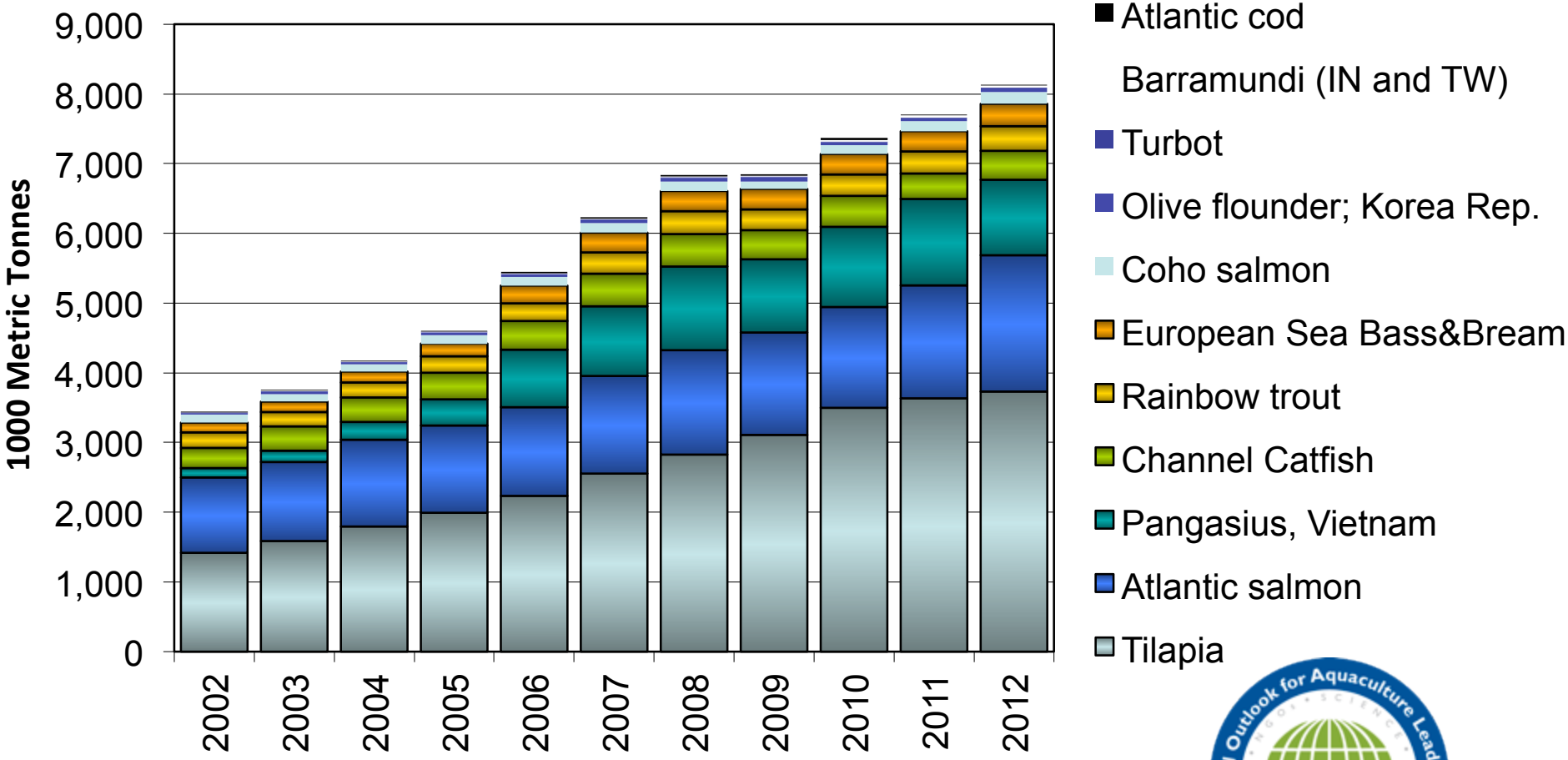


Source: Apostolos Tzoumas

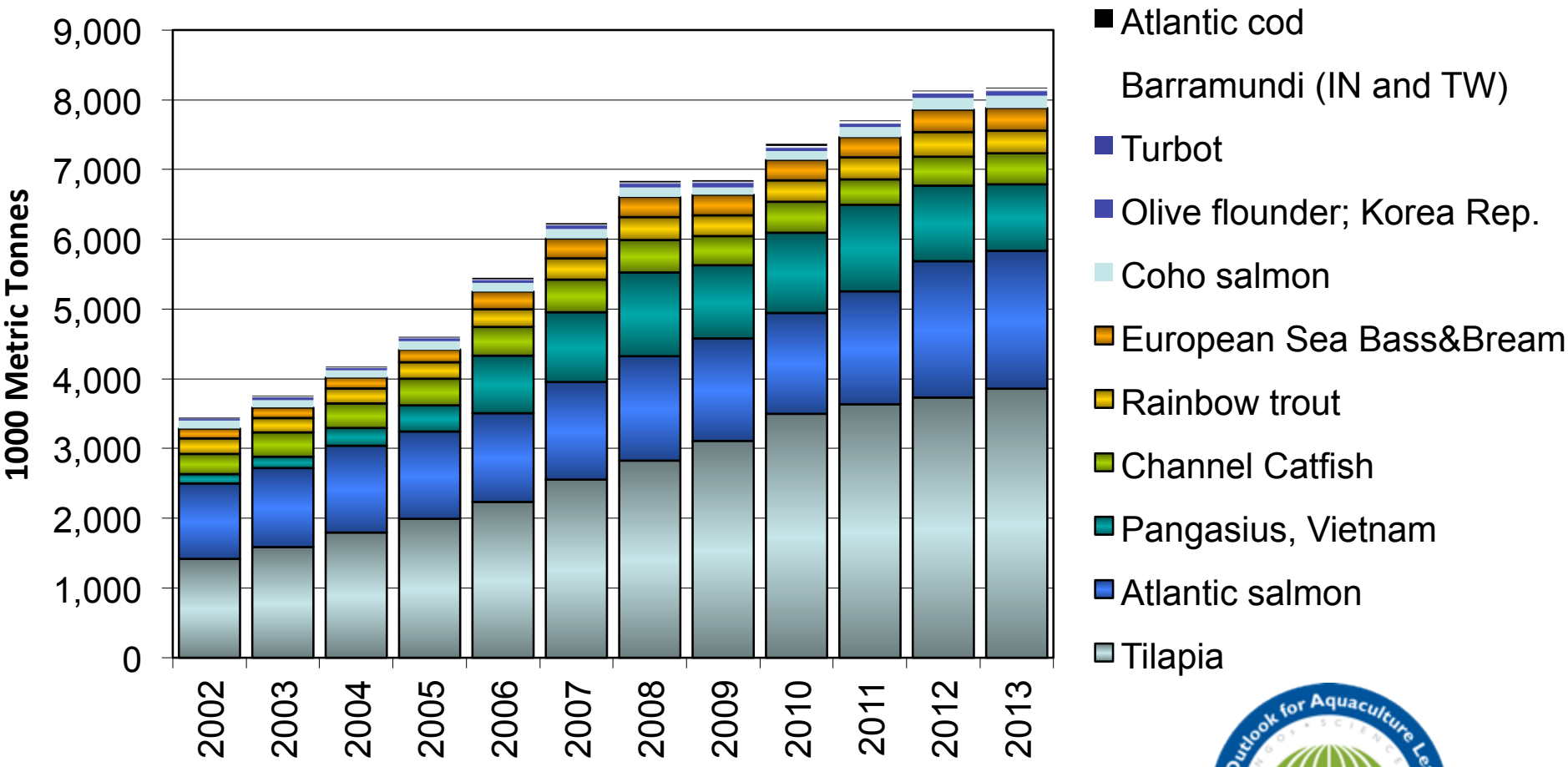
Summary

Production of Surveyed Species

2002-2012

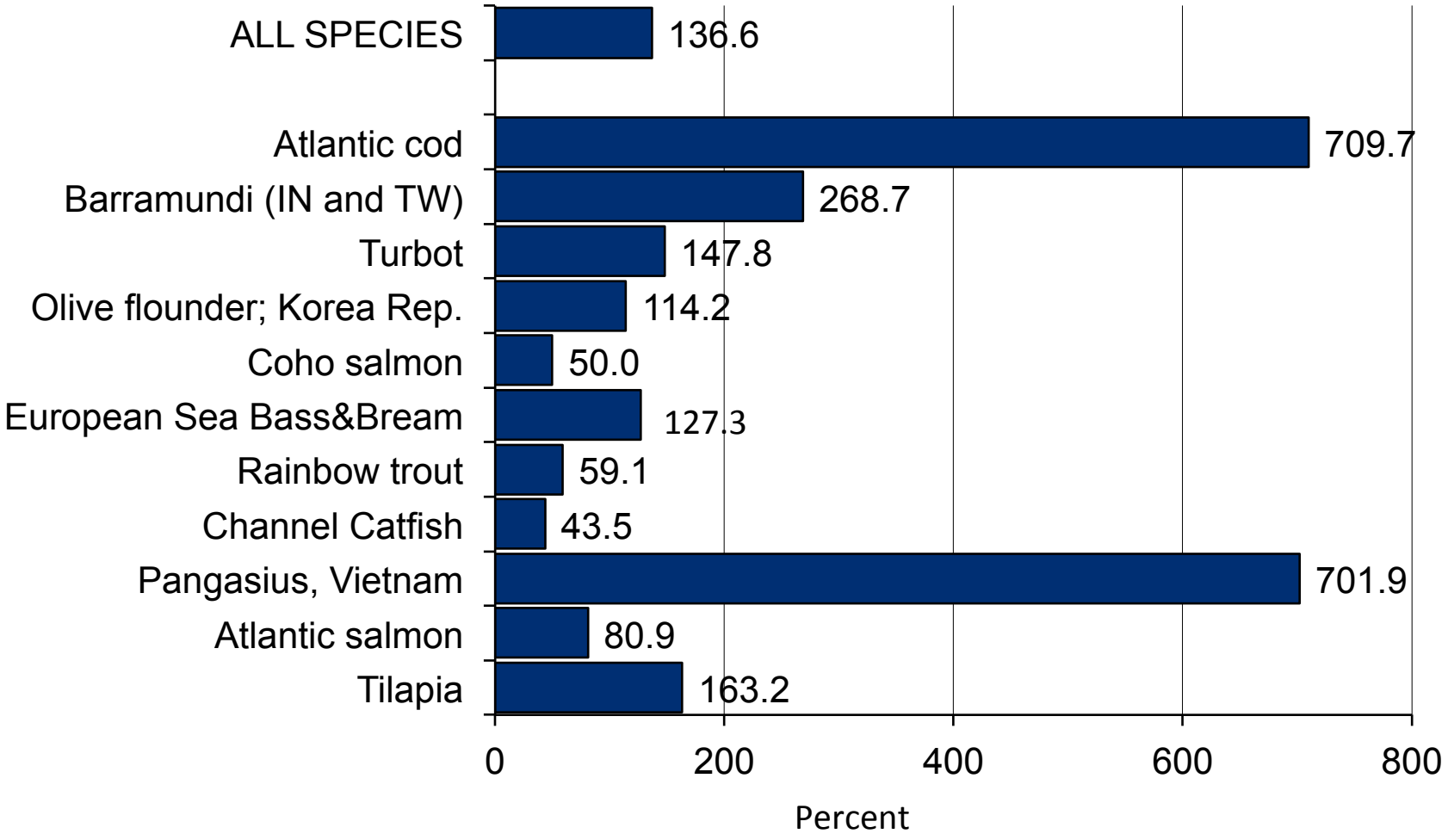


Production of Surveyed Species
2002-2013

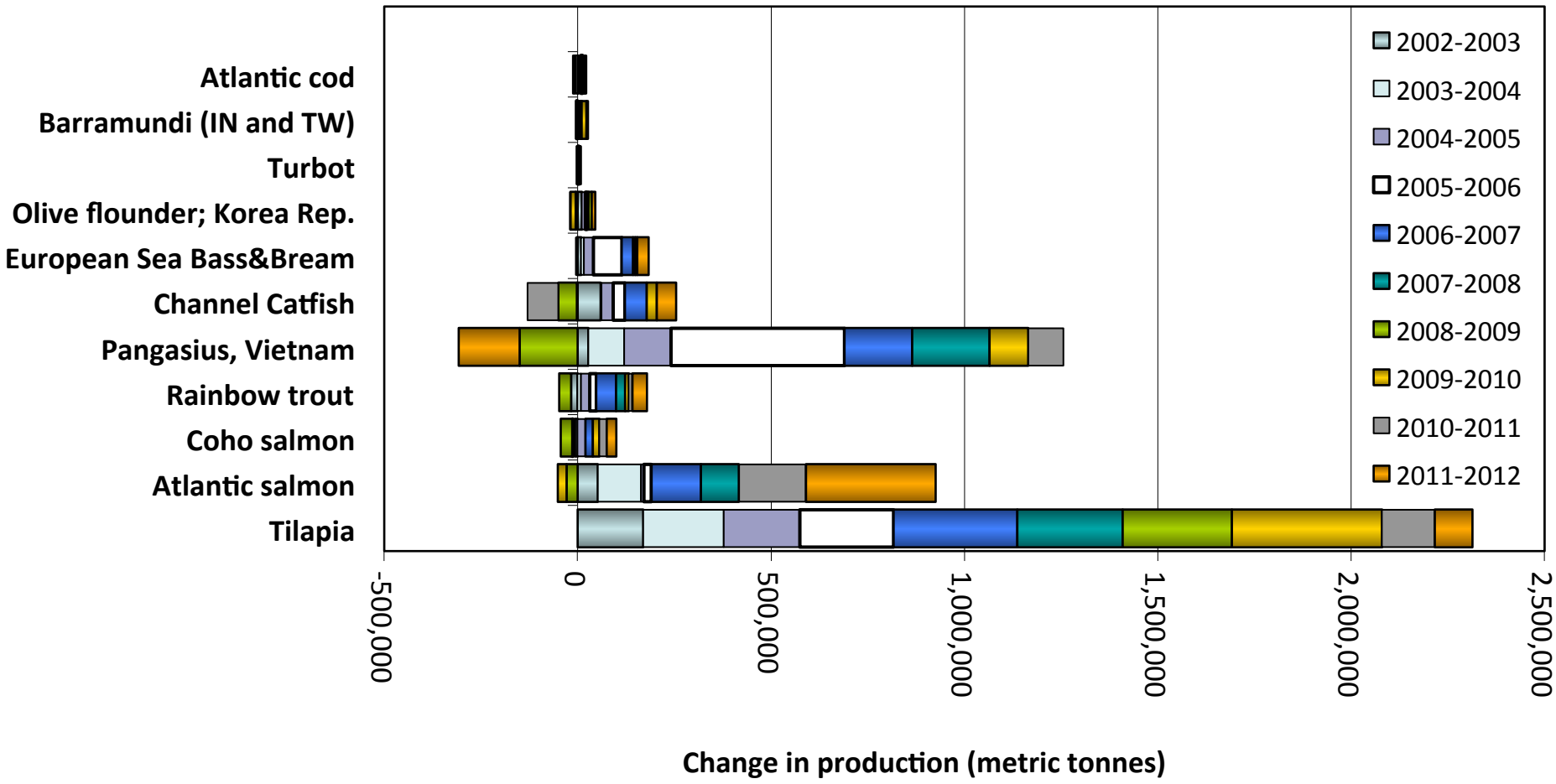


Did They Double In A Decade? Yes!

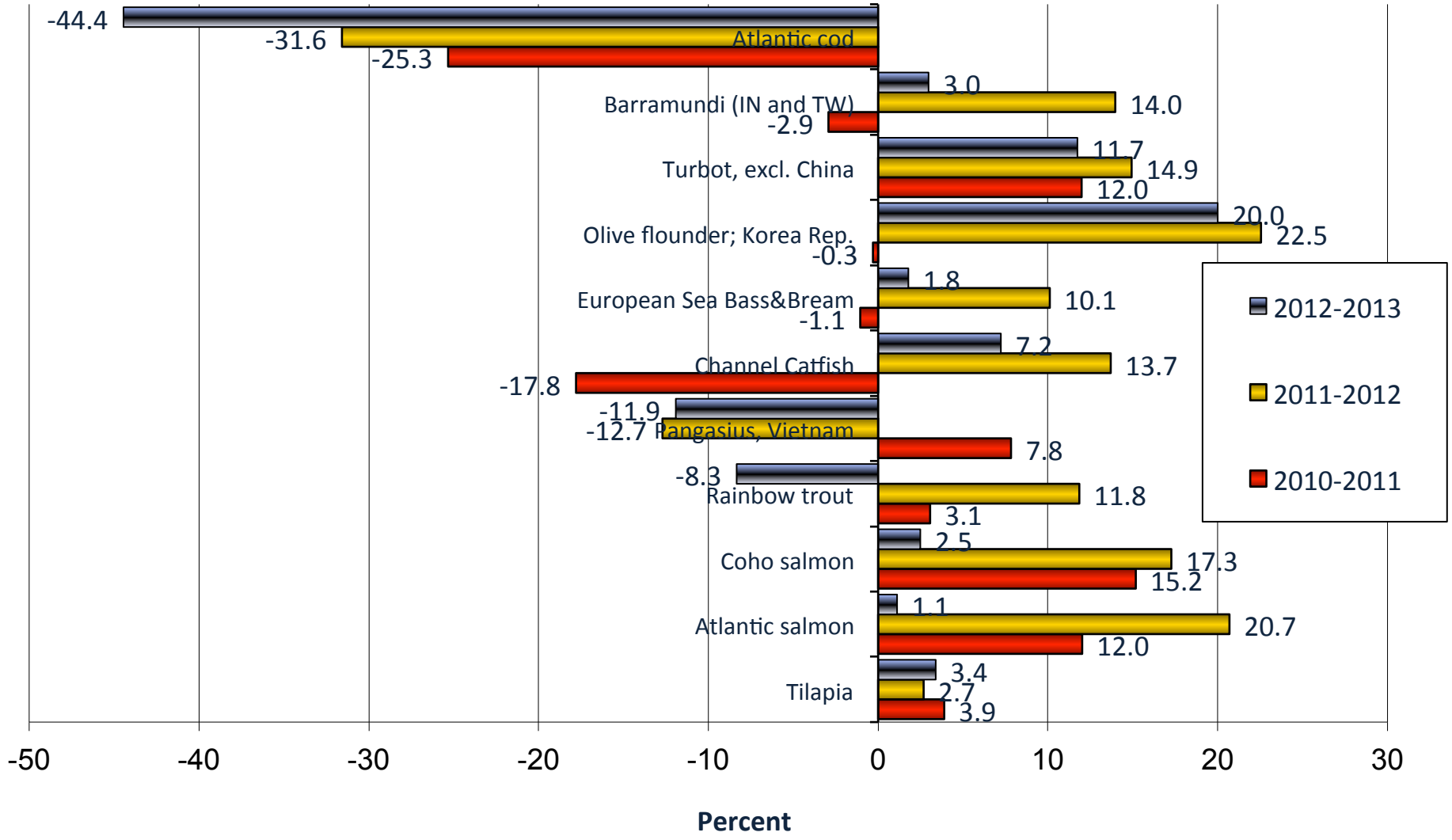
Percentage Growth 2002-2012



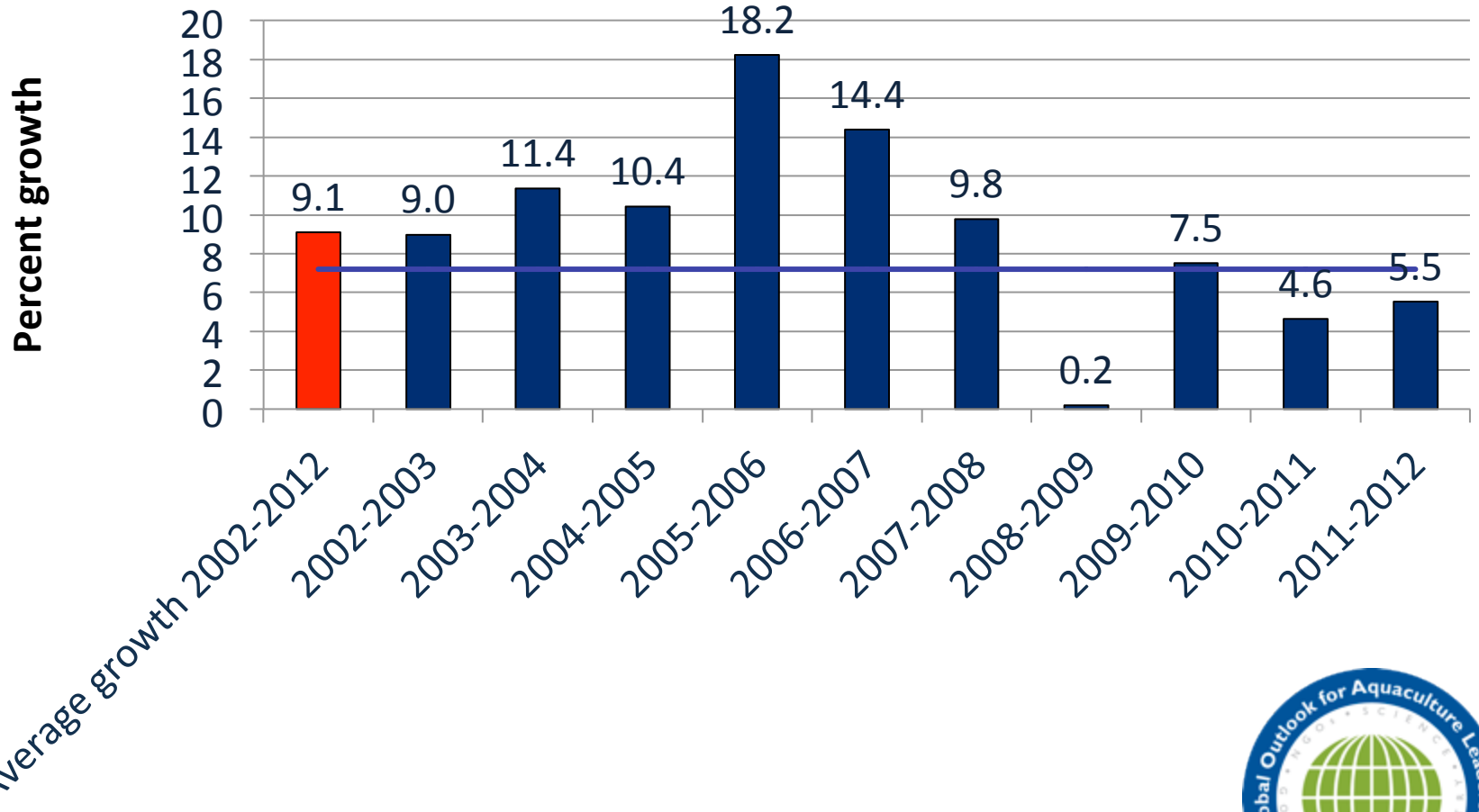
Cumulative Change in Production
2002-2012



Annual Percent Growth Rates
2009-2012



Average Annual Percentage Growth
(«Double in a decade» requires 7.2% annual growth)



Thank You!