



Fish Production Estimates & Trends 2011-2012

Ragnar Tveteras and
Ragnar Nystoyl

Scope of Analysis

- **Focus on internationally traded species:**
 - Typically imported to USA, Europe & Japan.
- **Production forecasts for 2011 for all chosen species:**
 - But for some species only major producer countries/regions.
- **Global production forecast for 2012 almost all species.**



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

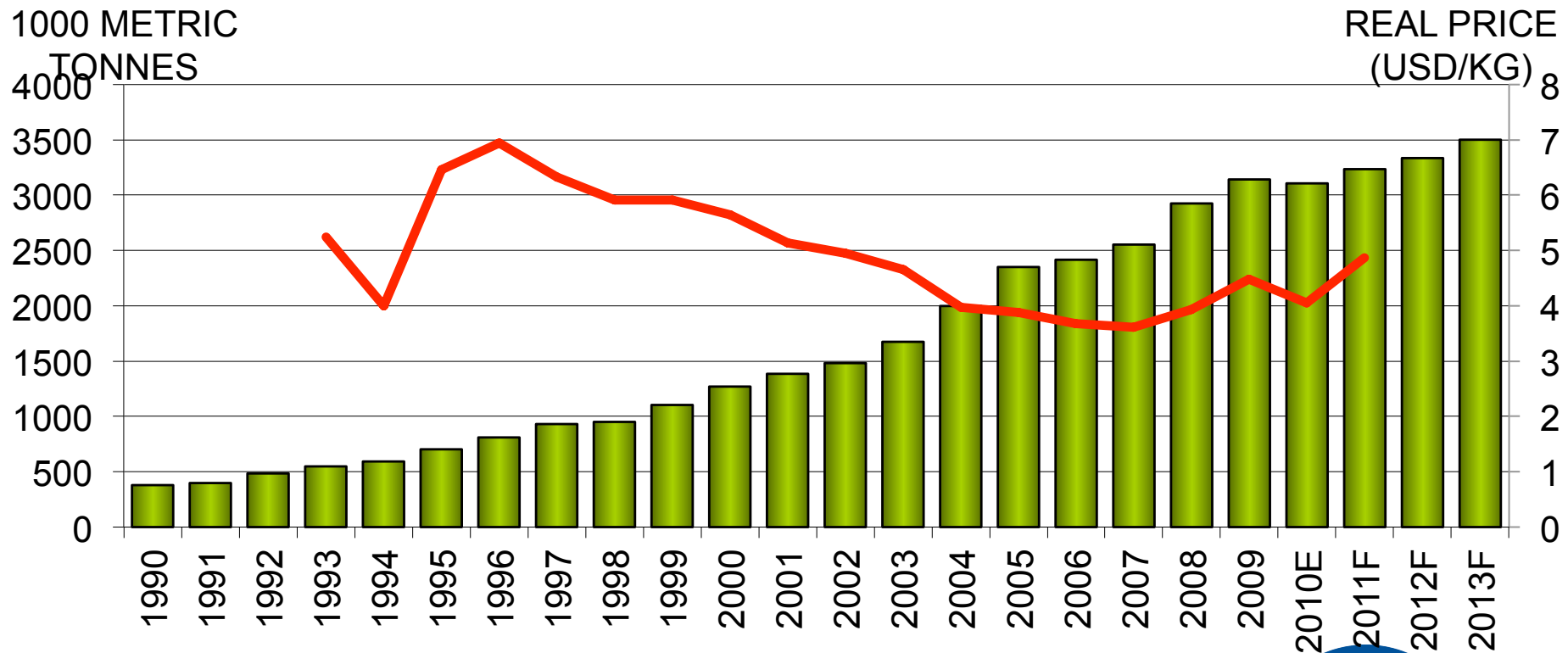


TILAPIA



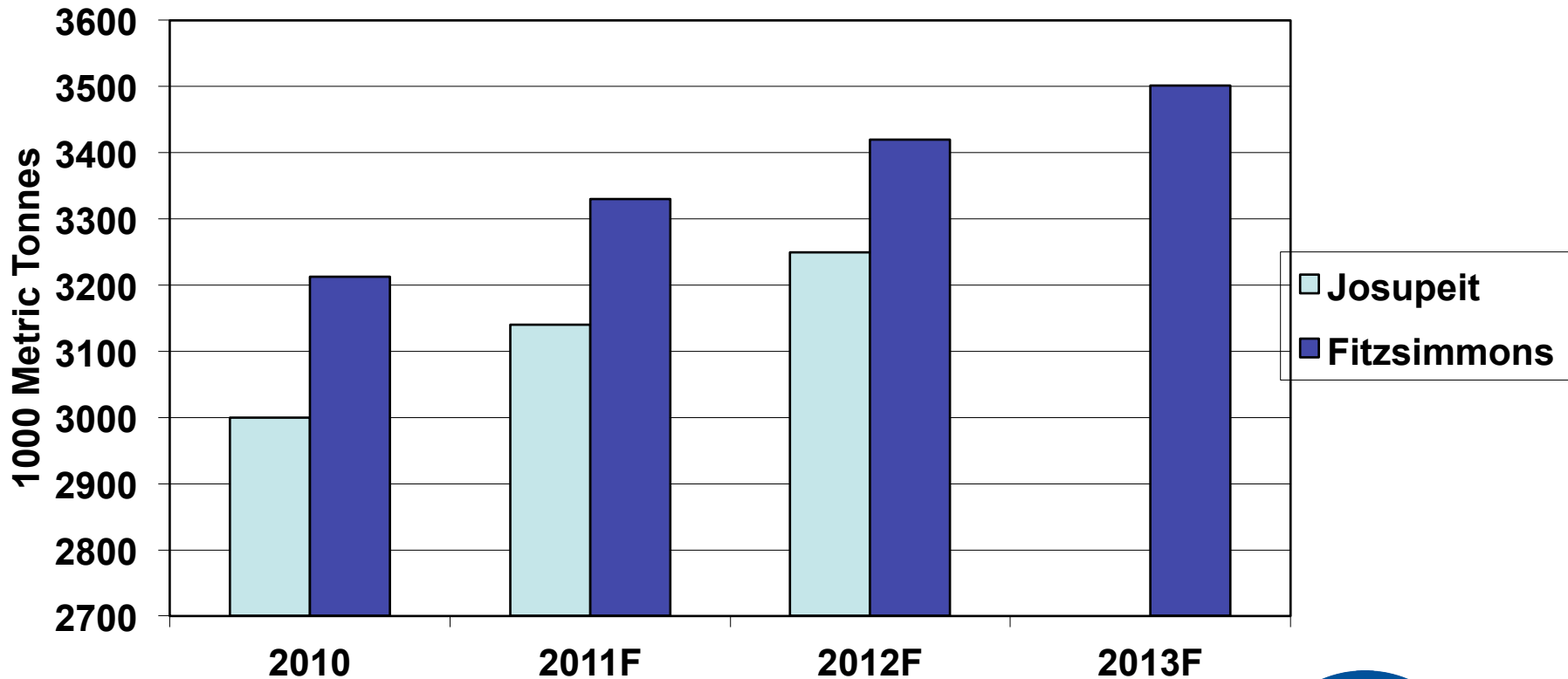
Tilapia

Global Aquaculture Production



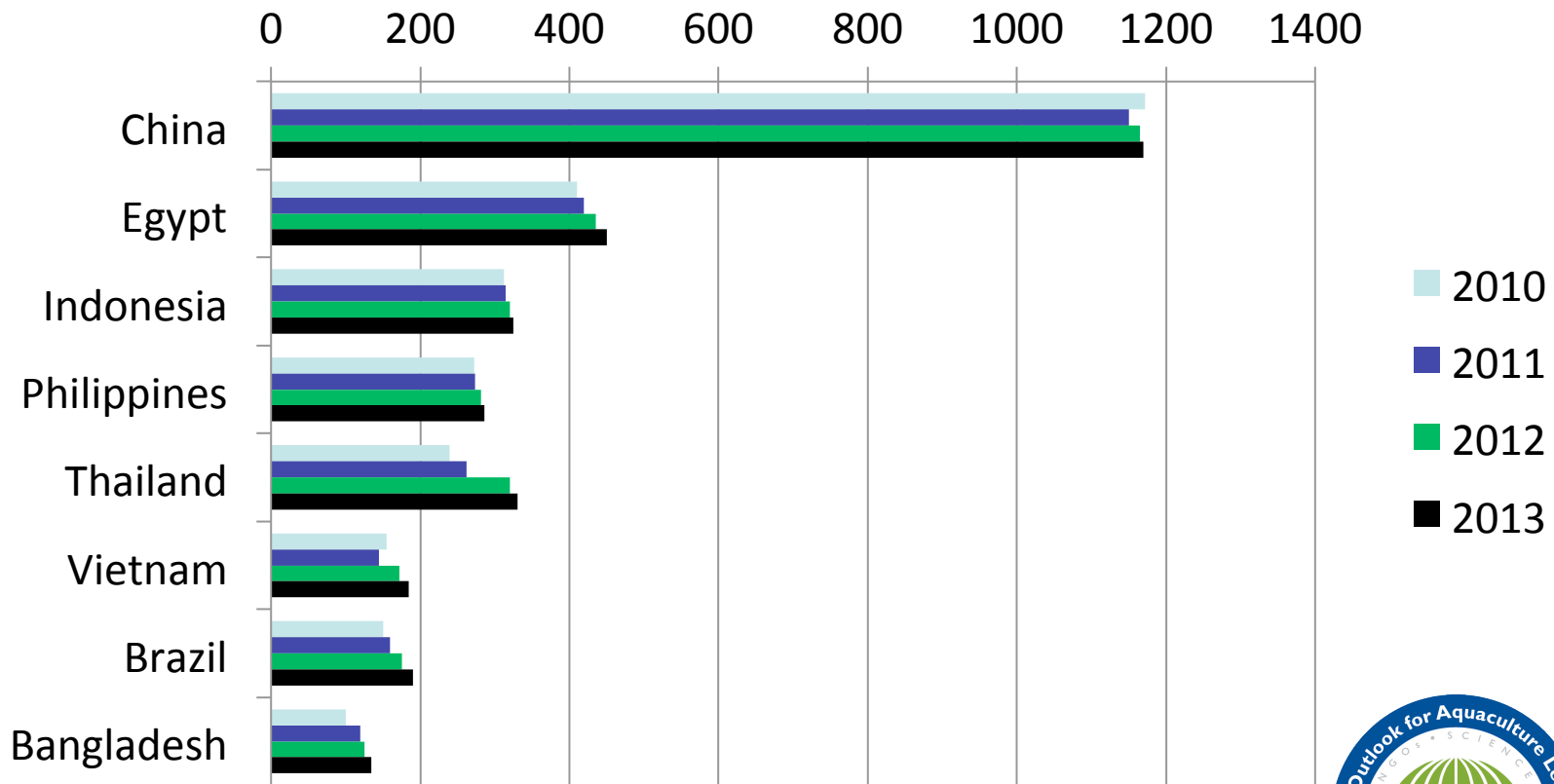
Tilapia

Global Aquaculture Production



Tilapia

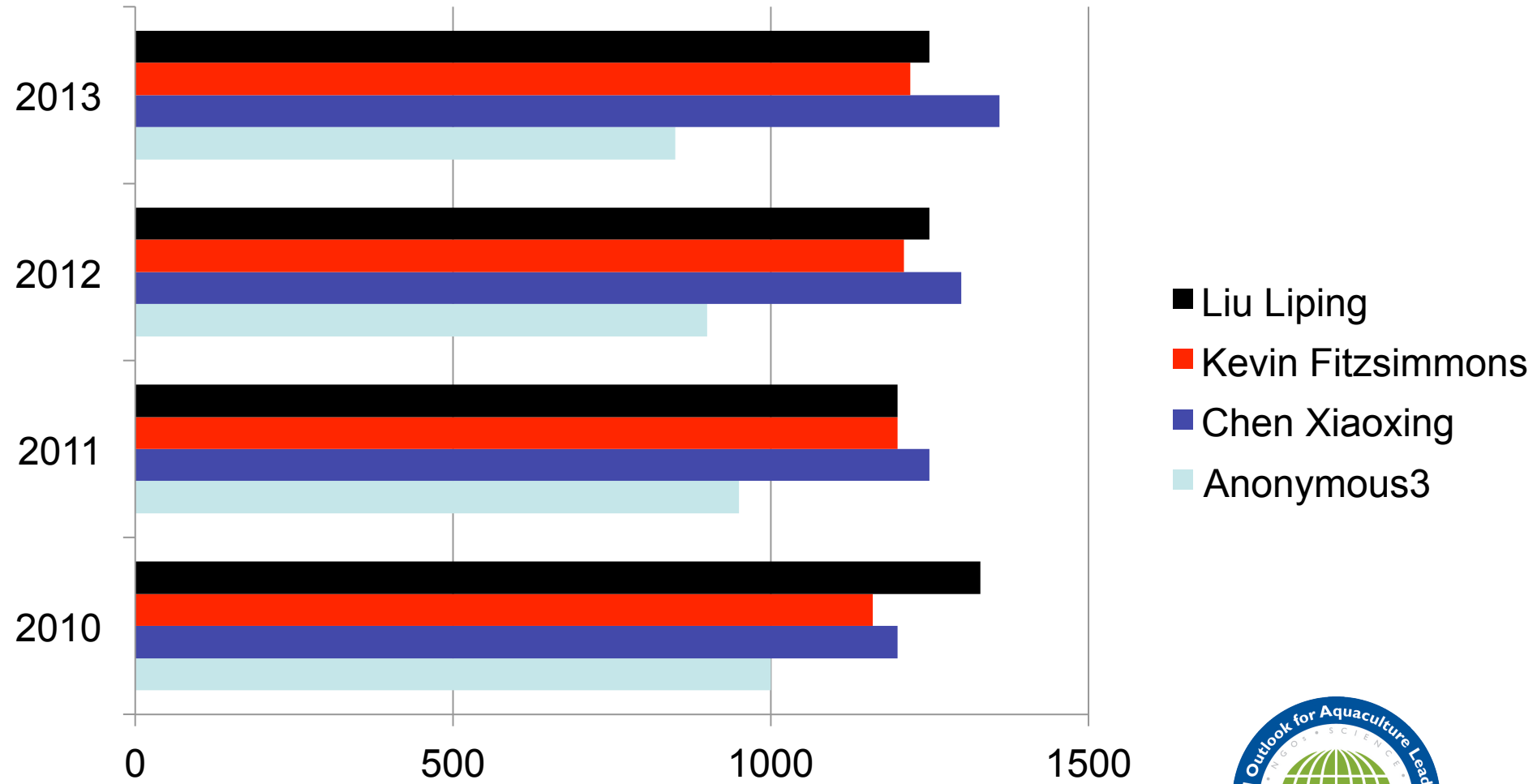
Production by Country



Average of estimates from several sources.

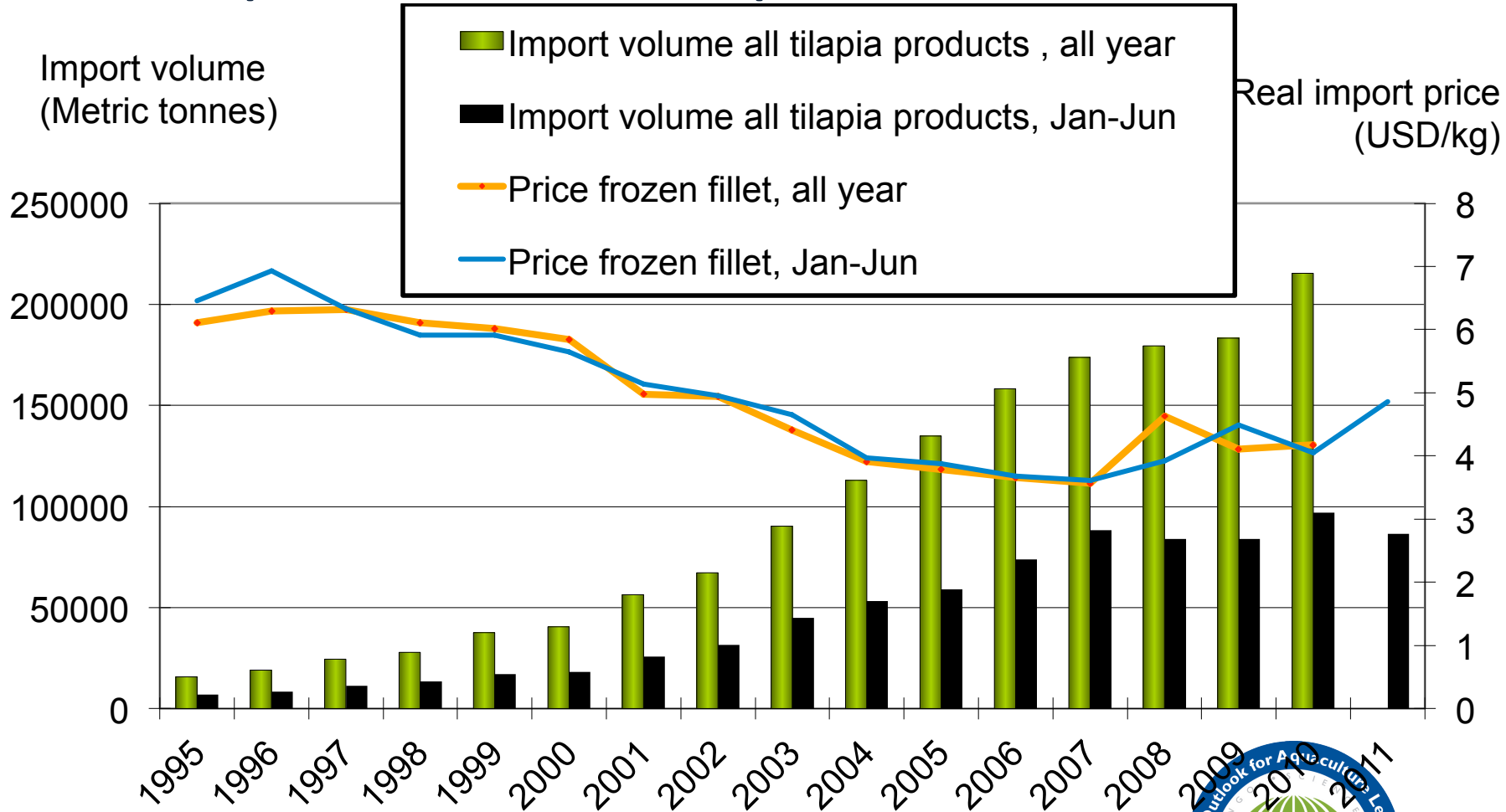


Tilapia production estimates for China



Tilapia

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

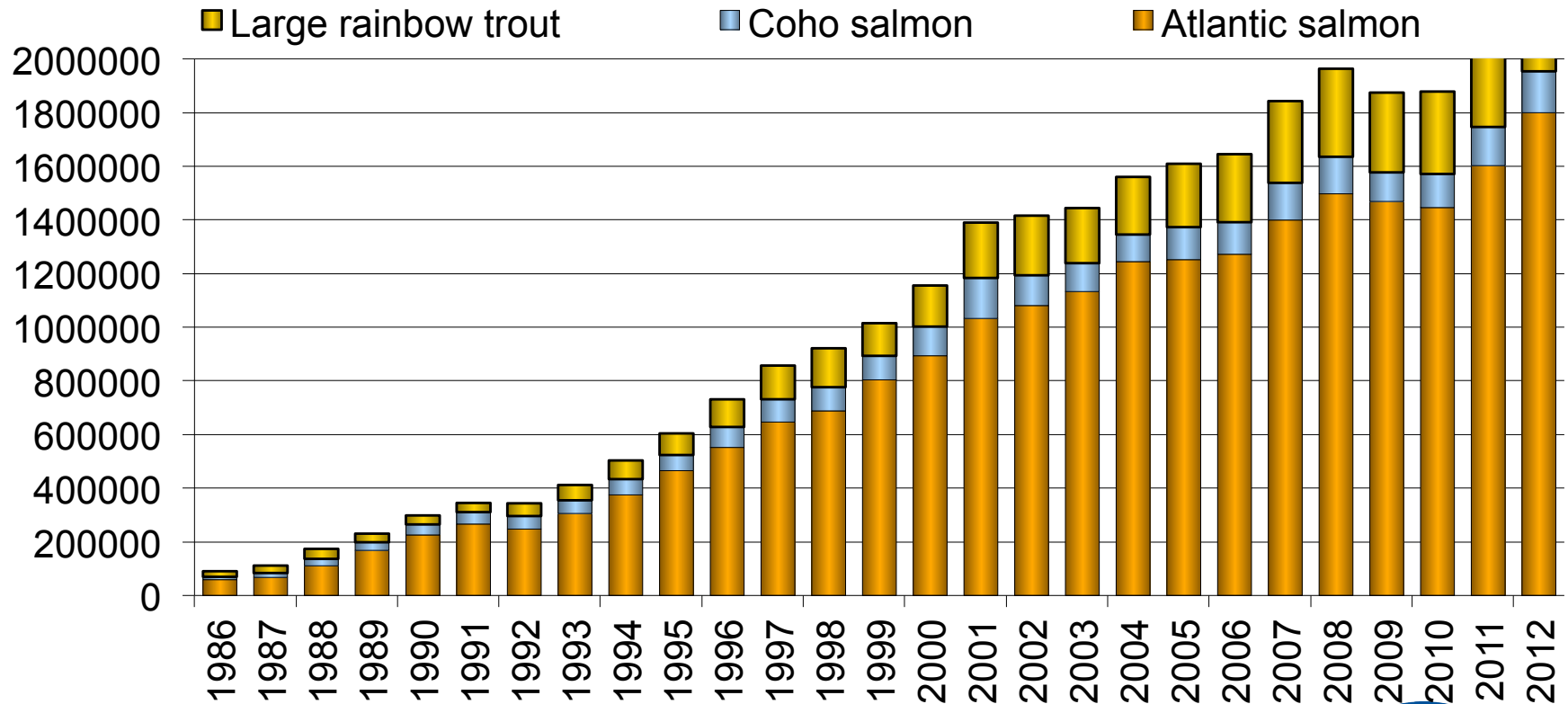


SALMONIDS



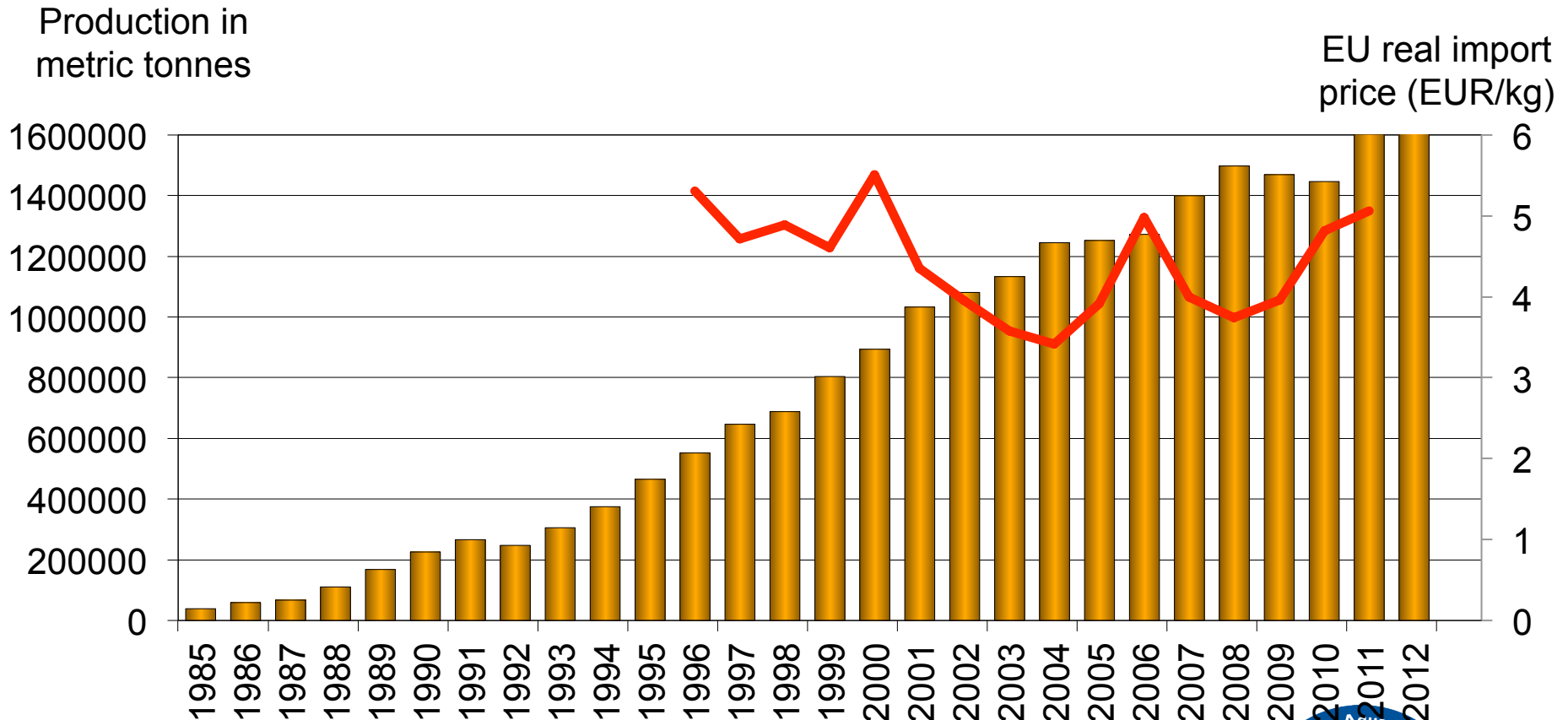
Atlantic & Coho Salmon & Rainbow Trout Total Production

Metric tonnes

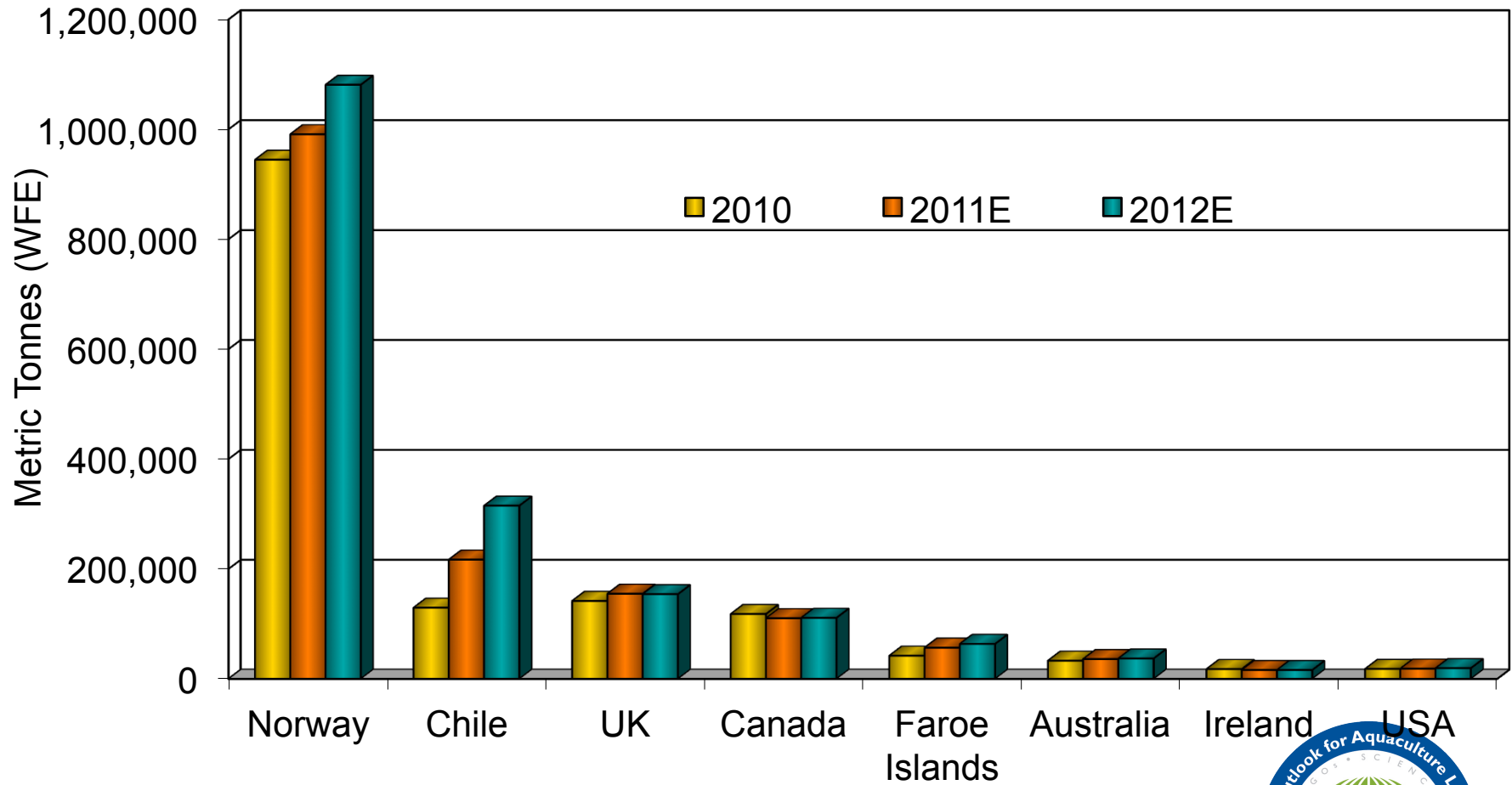


Atlantic Salmon

Production and EU real import price fresh gutted

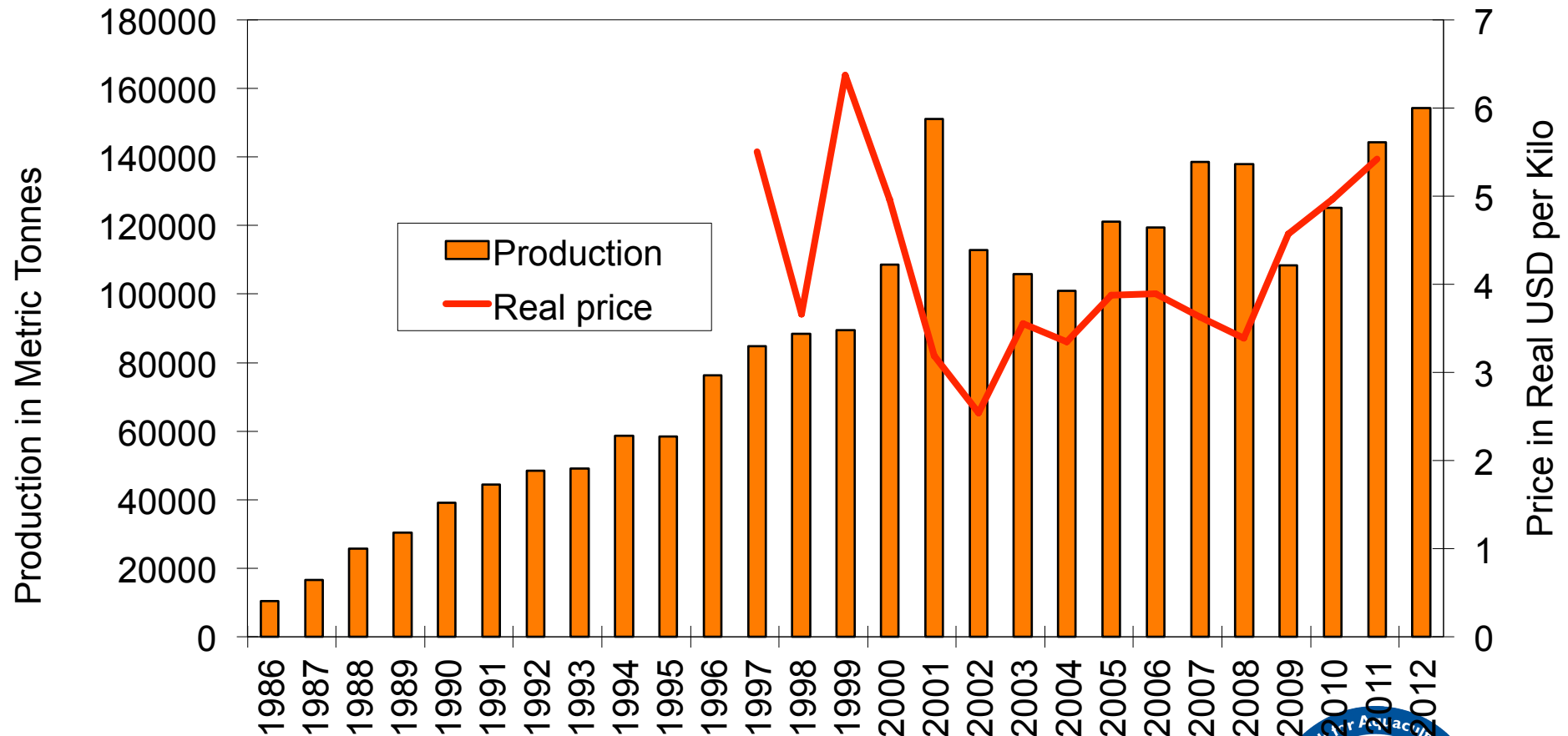


Farmed Atlantic Salmon Production

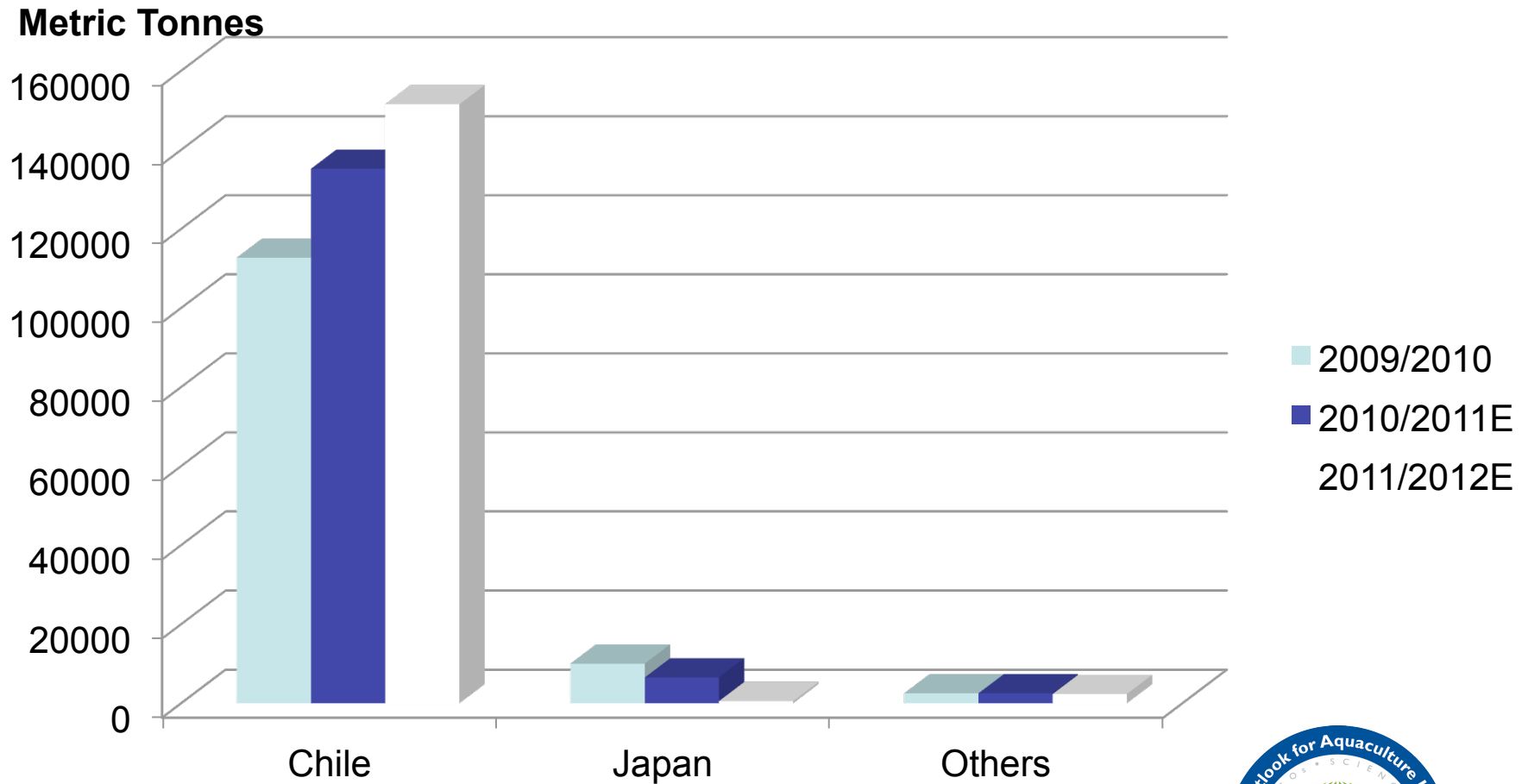


Coho Salmon

Total Production and Real Export Price on Chilean Coho Frozen Round

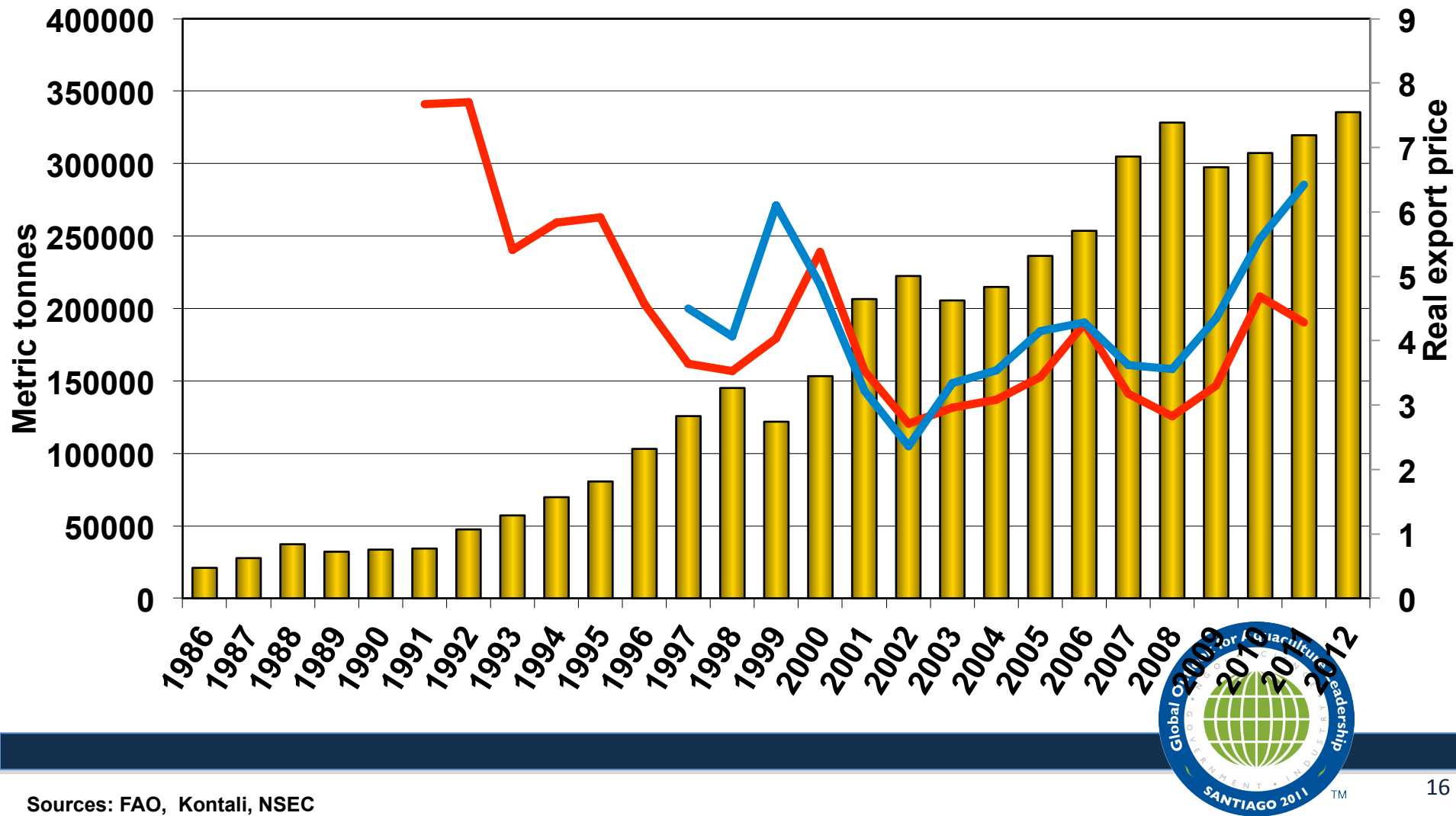


Coho Salmon Farmed Production

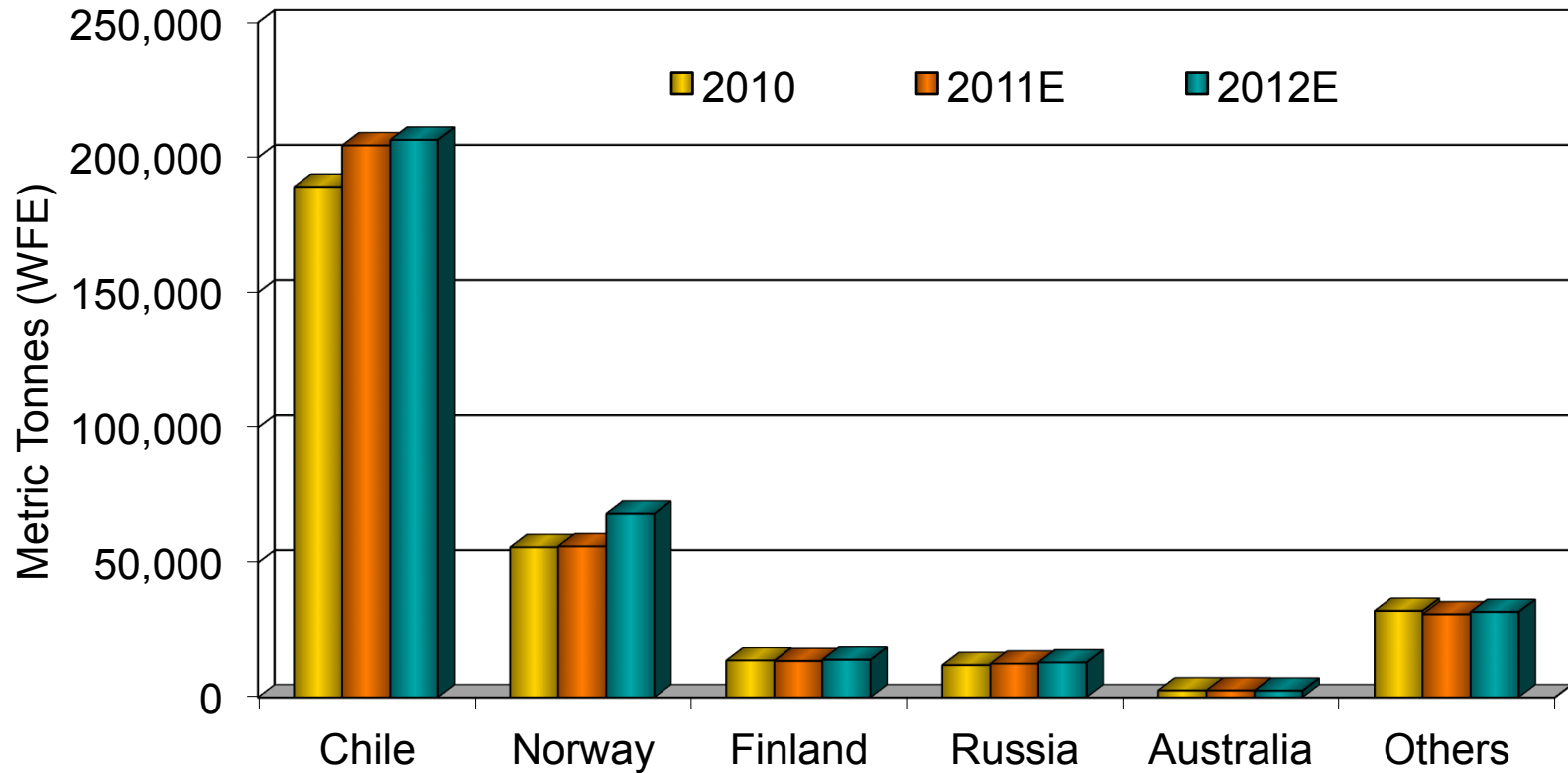


Rainbow Trout

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



Rainbow Trout Production

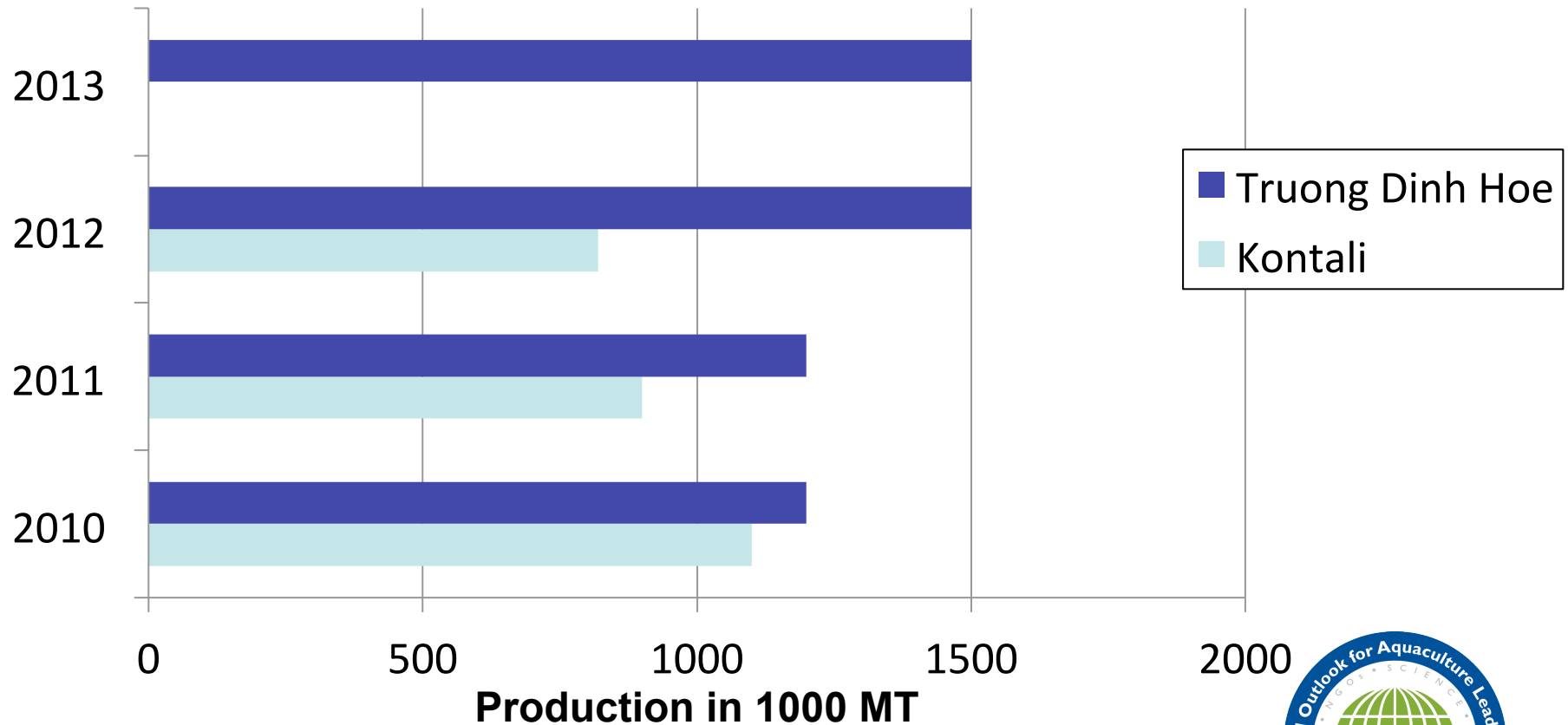


PANGASIUUS



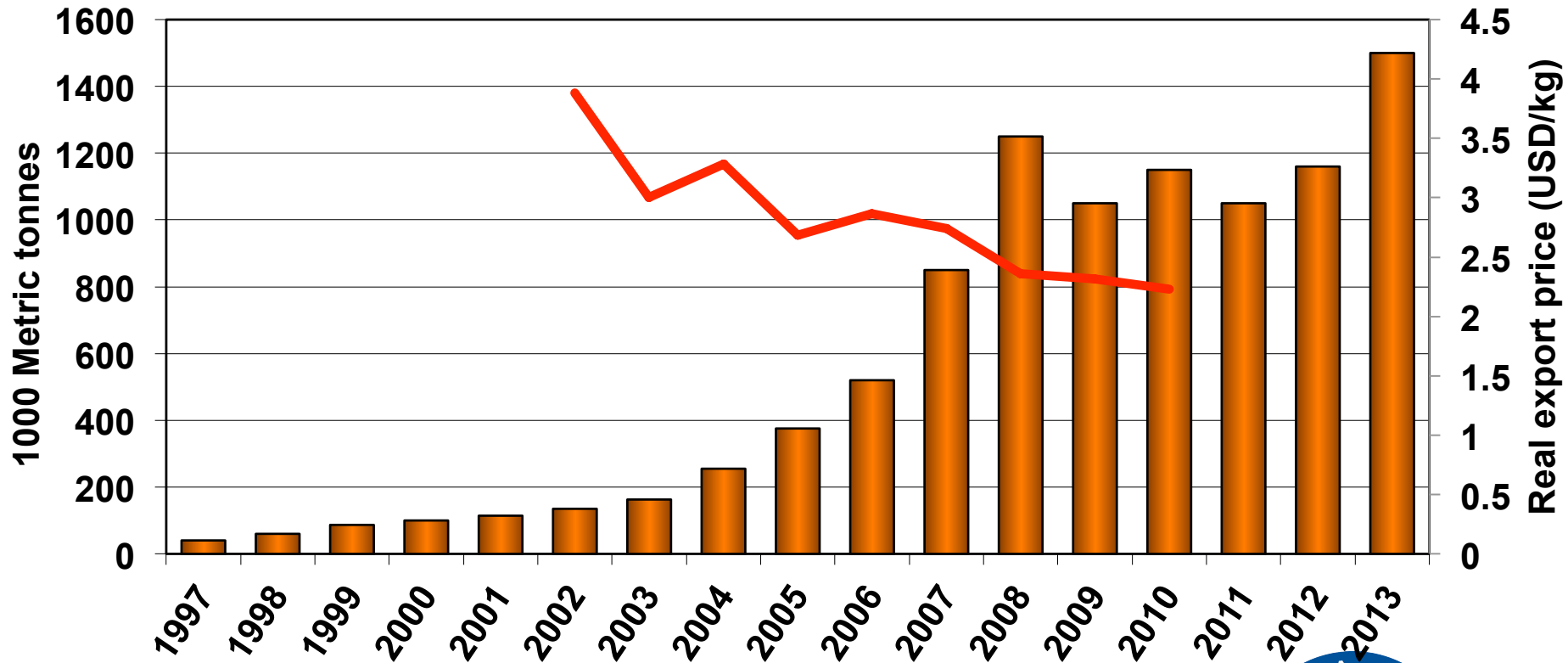
Pangasius, Vietnam

Estimates from two sources



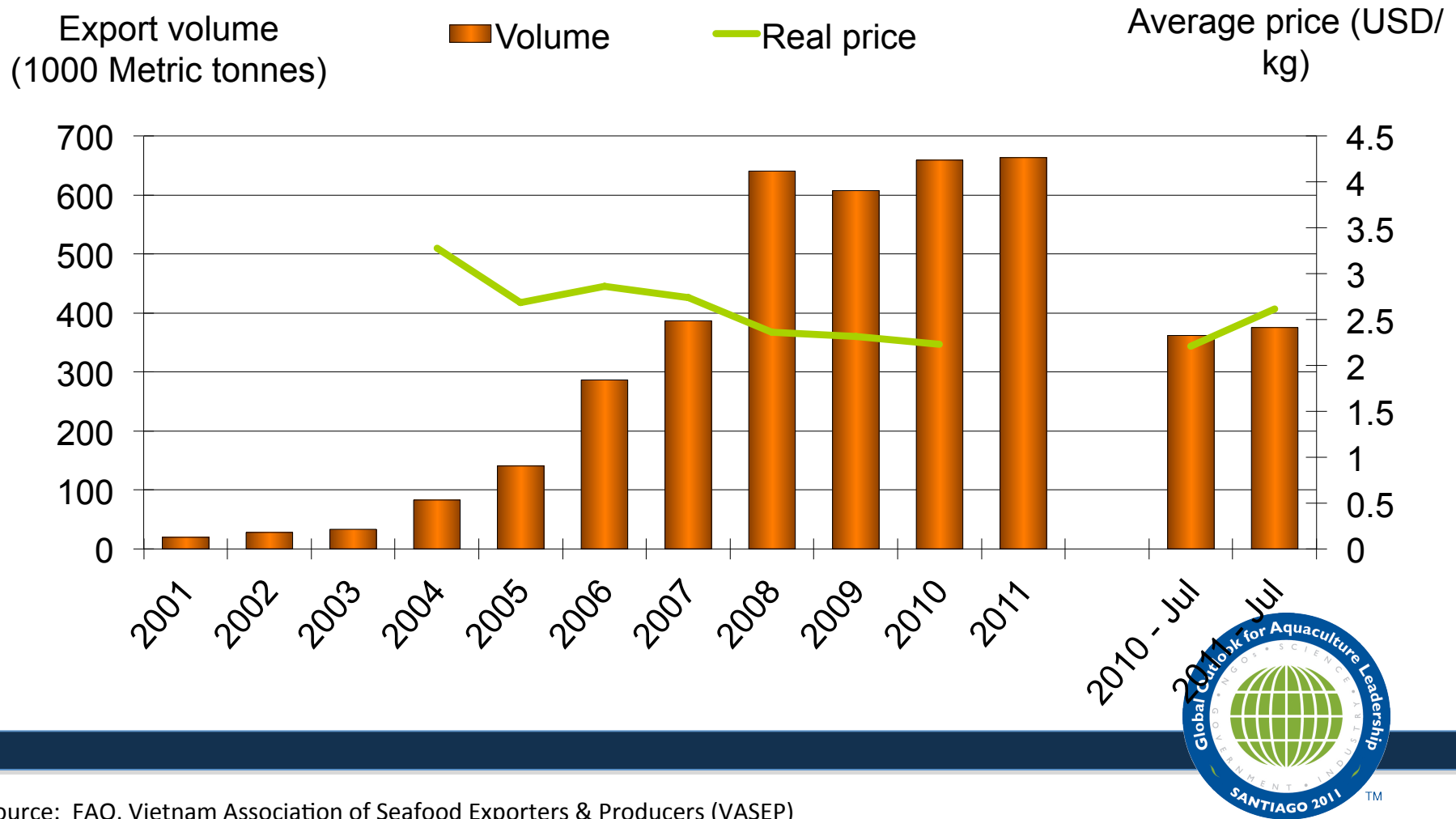
Pangasius

Production in Vietnam



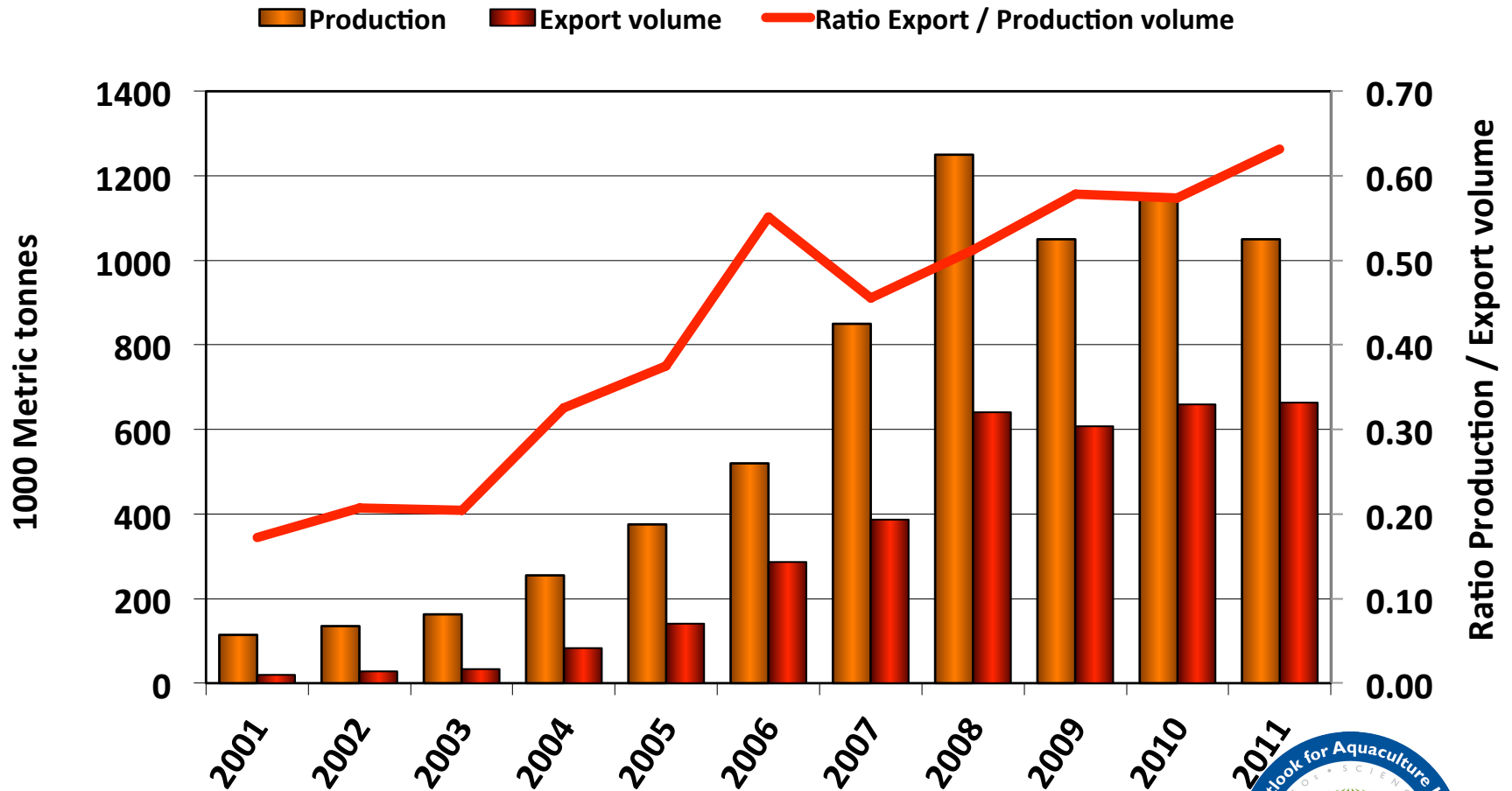
Pangasius

Vietnam Export Volume & Average Price



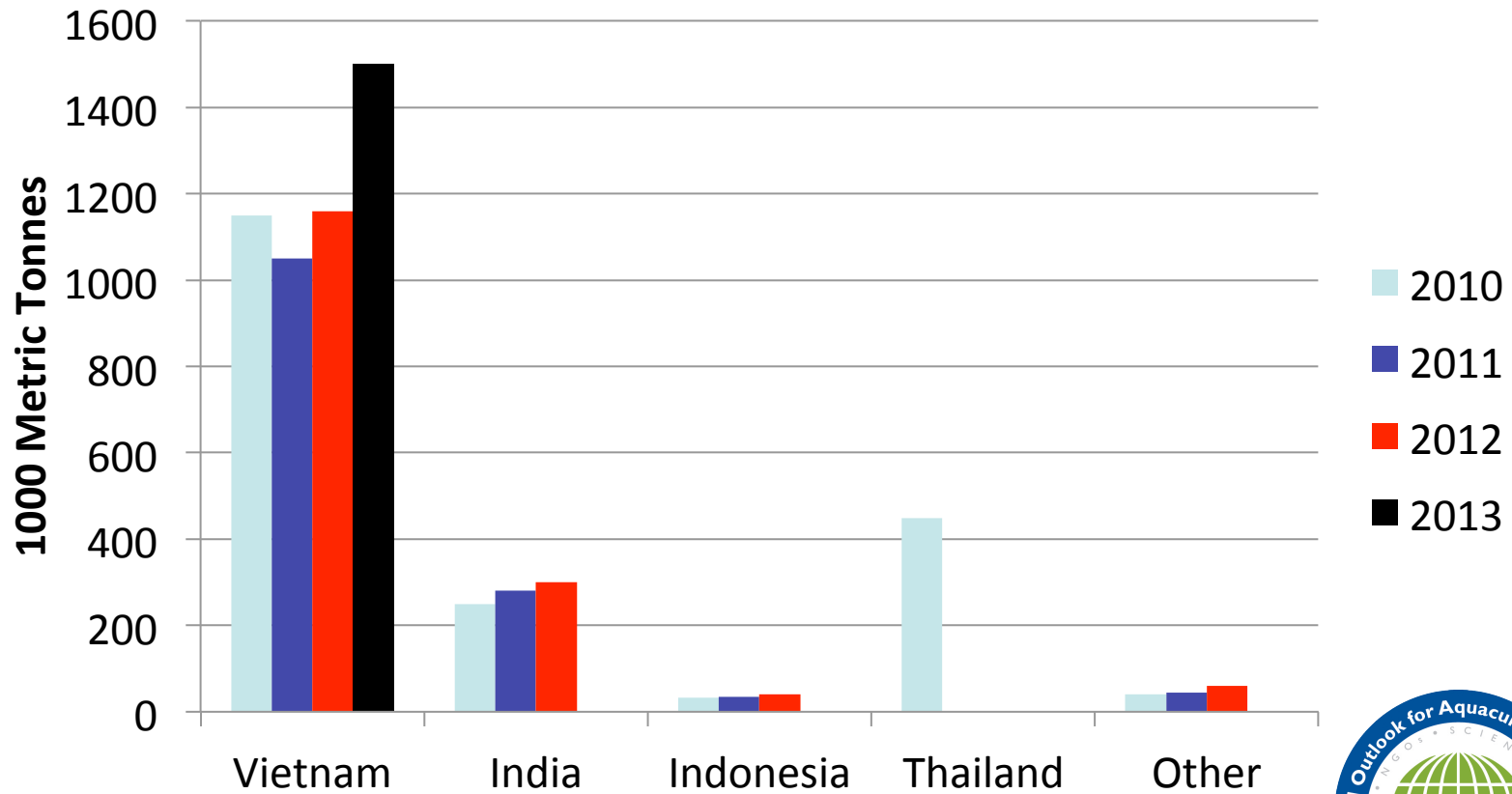
Pangasius

What is the relationship between production and exports?



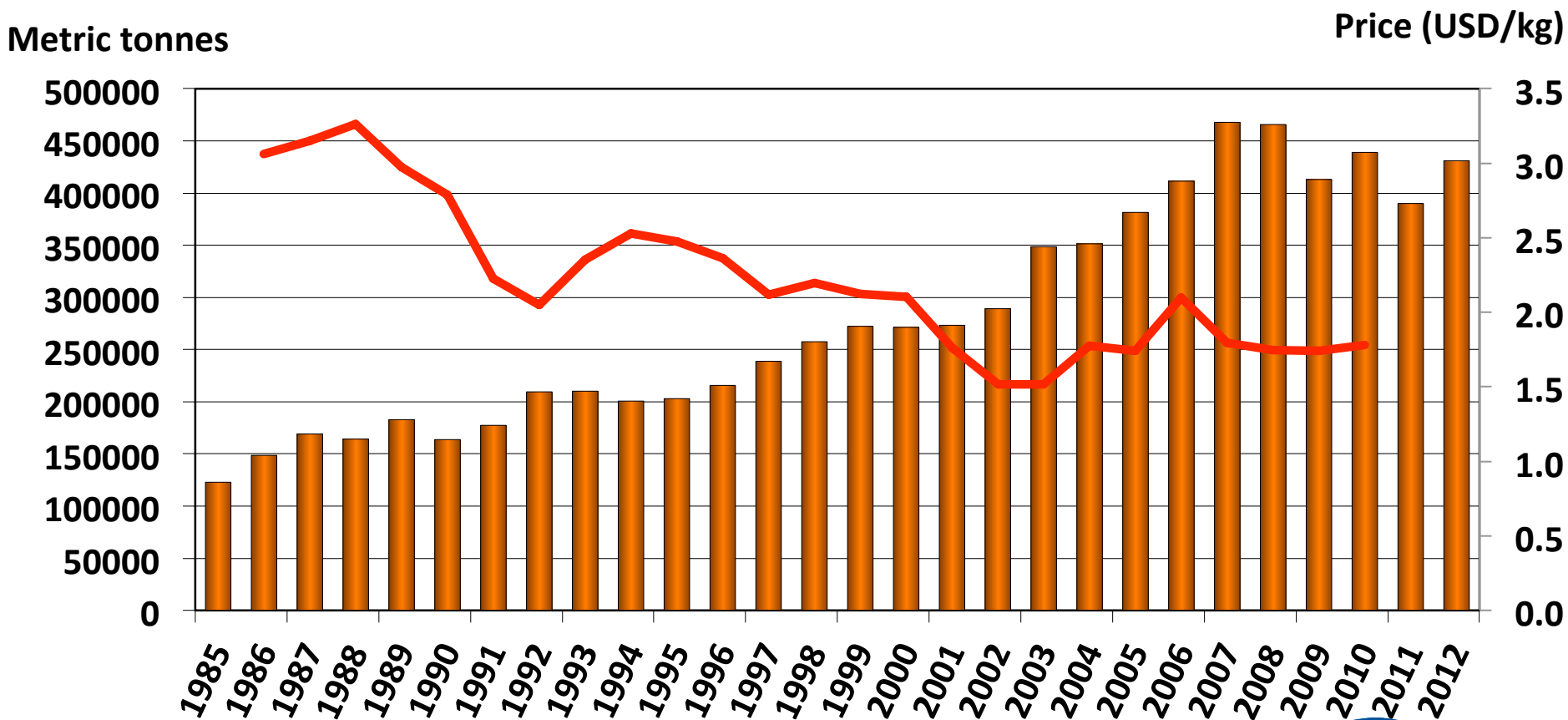
Pangasius

Production by country



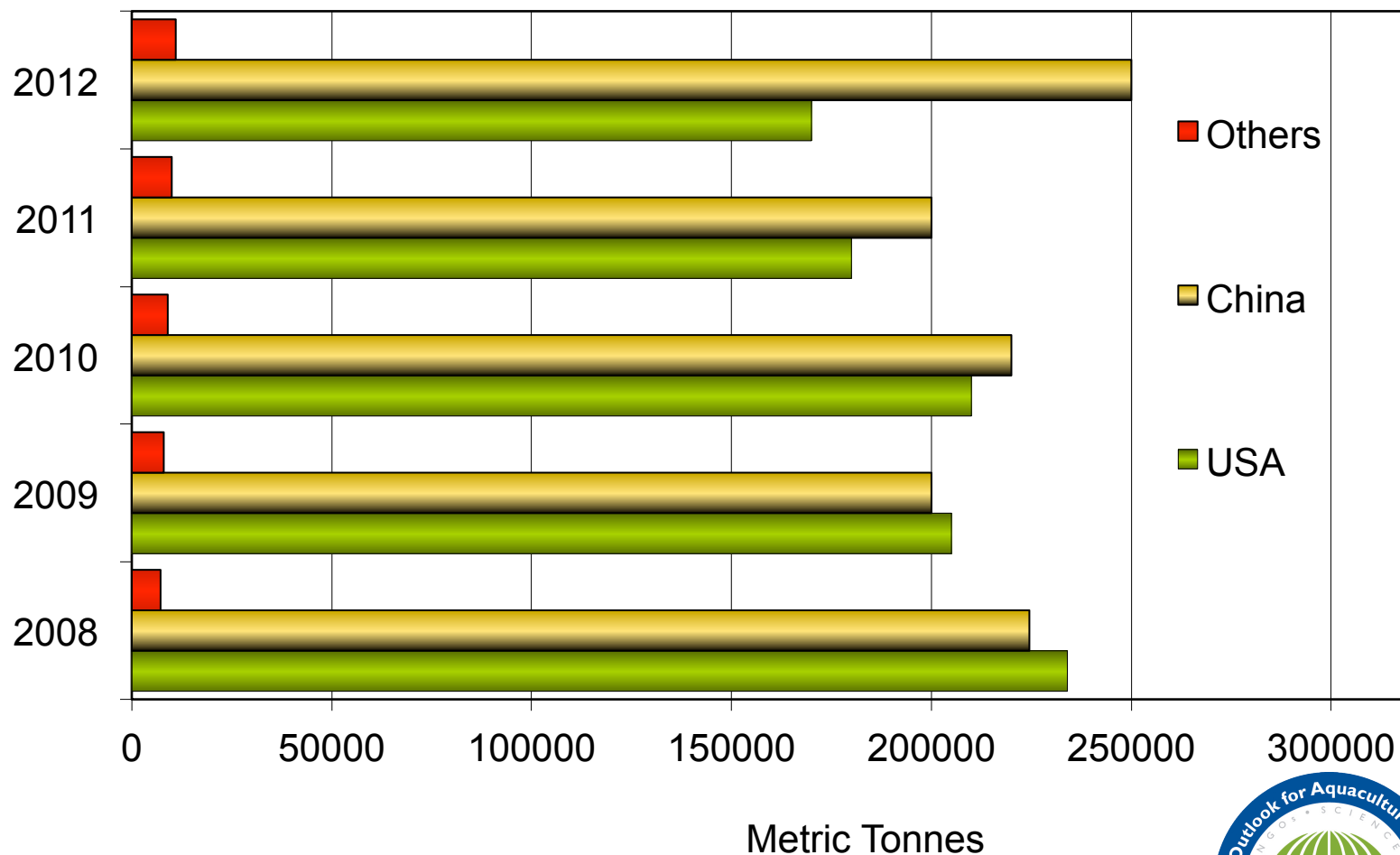
Channel Catfish

Total Global Production and Real Price U.S.



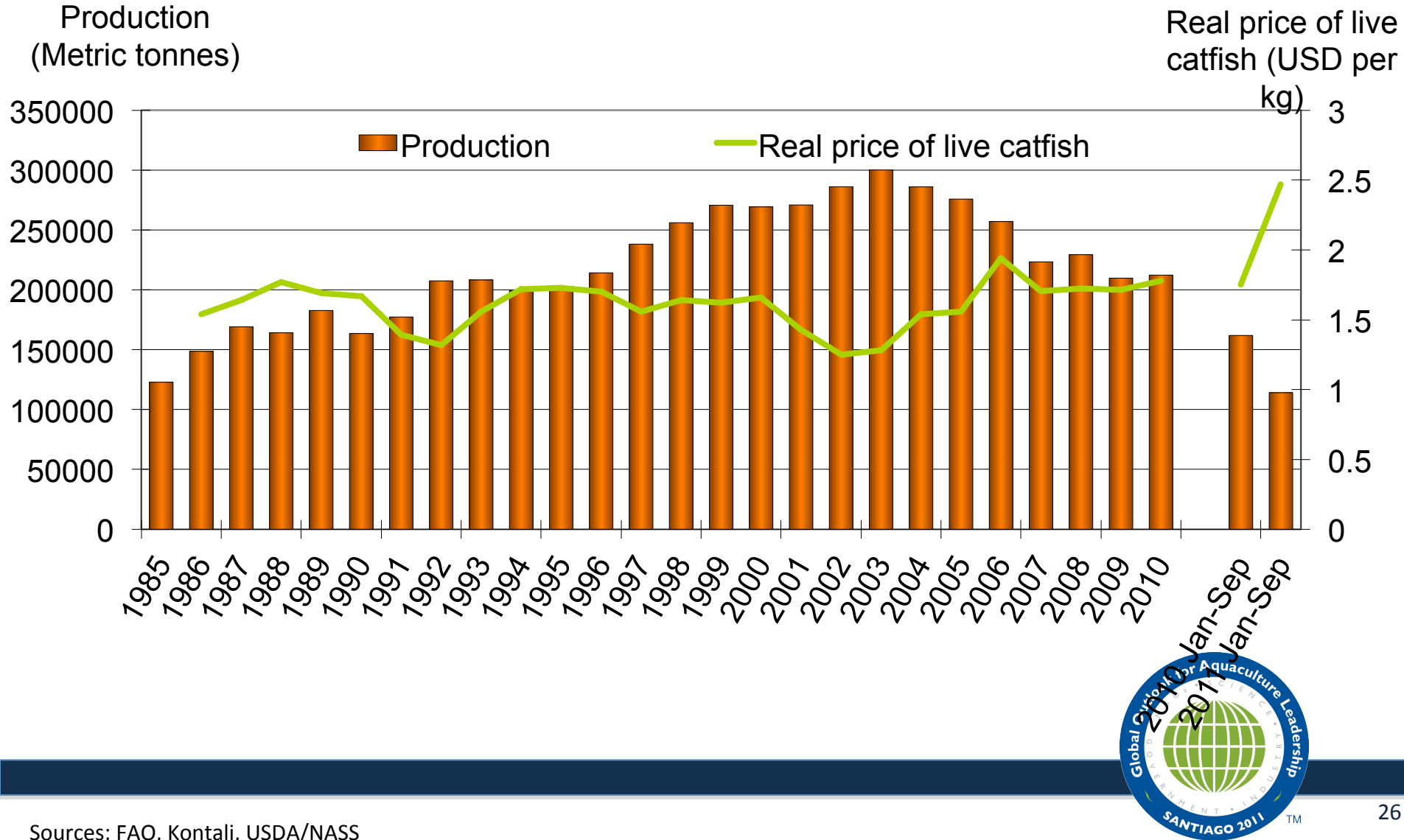
Channel Catfish

Production by Country



Channel Catfish

U.S. Production and Real Price



SEA BREAM



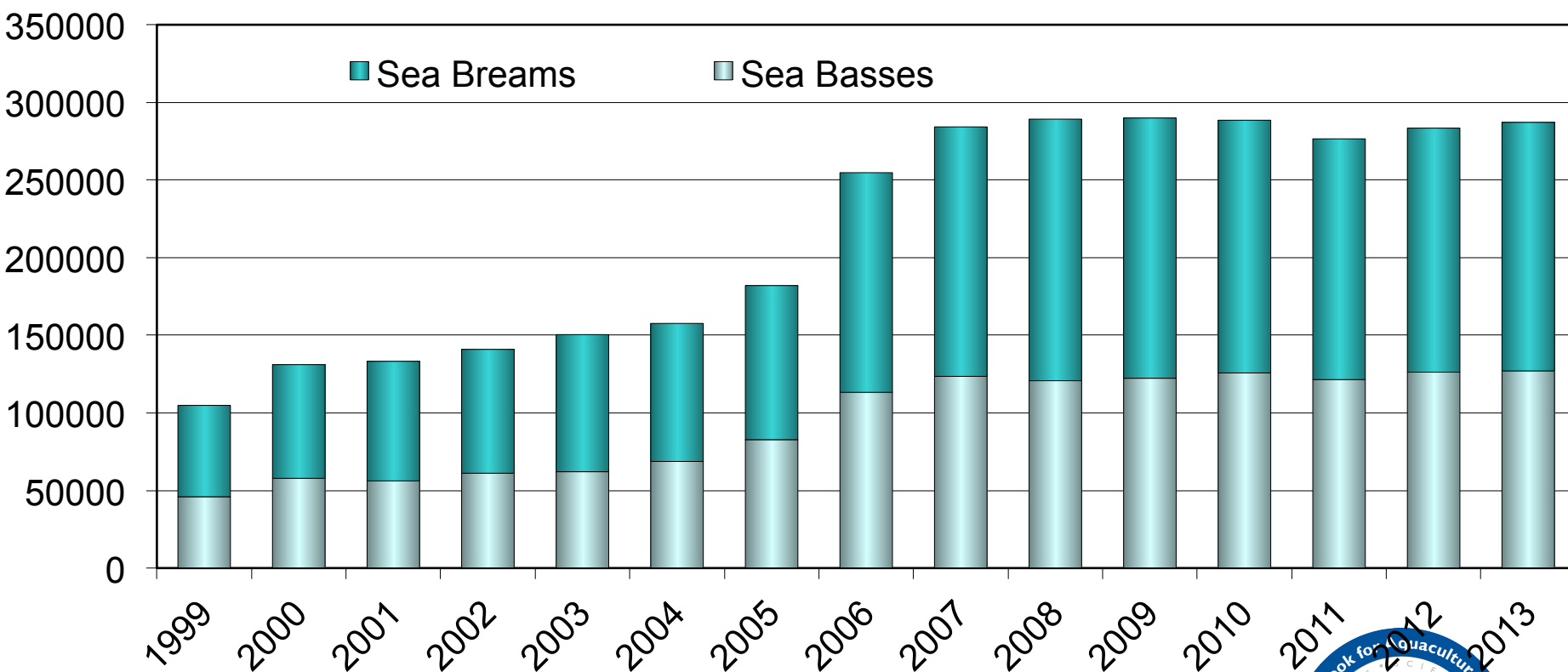
SEABASS



Seabass & Sea Bream

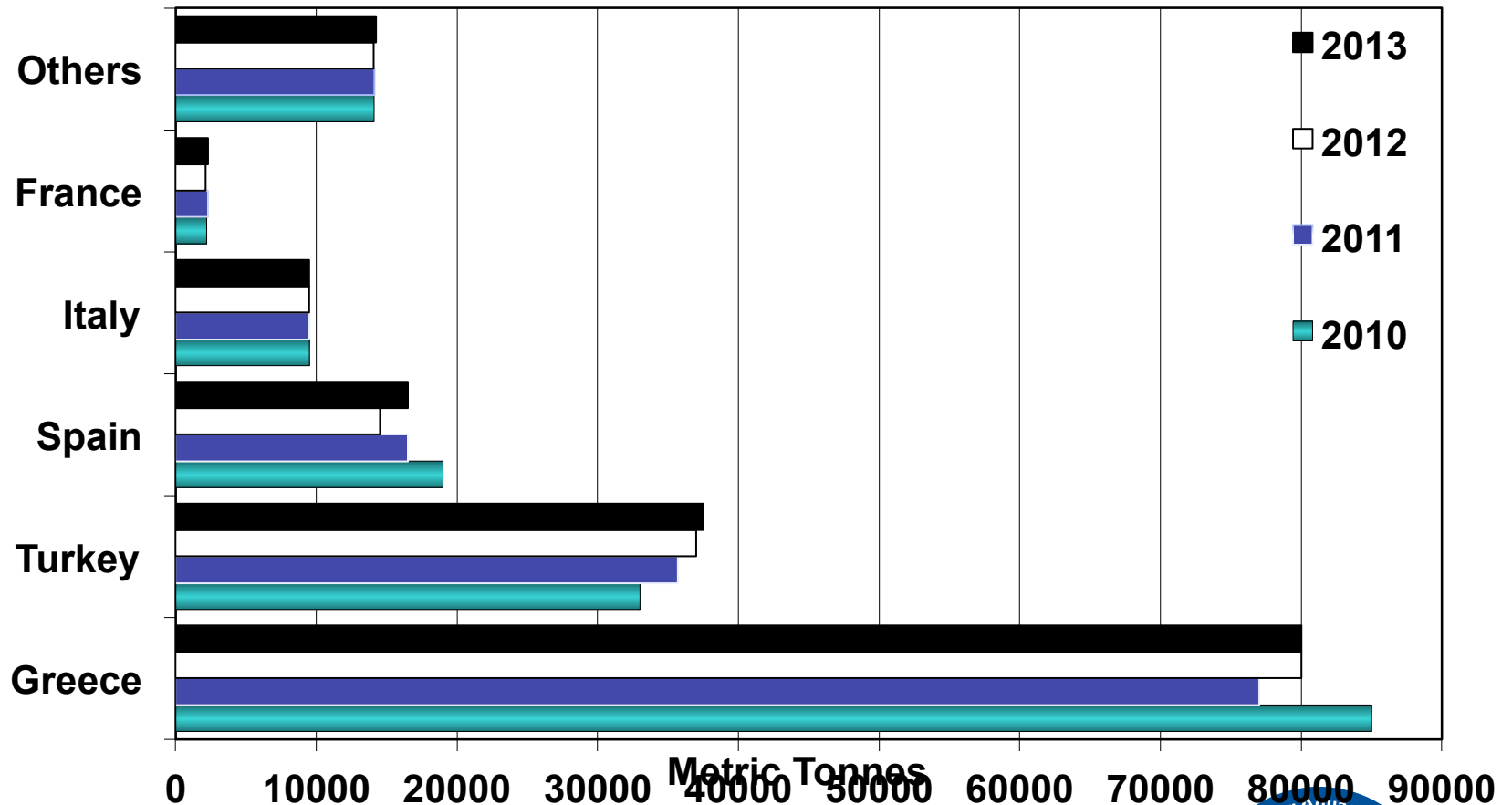
Mediterranean Production

Production
in metric tonnes



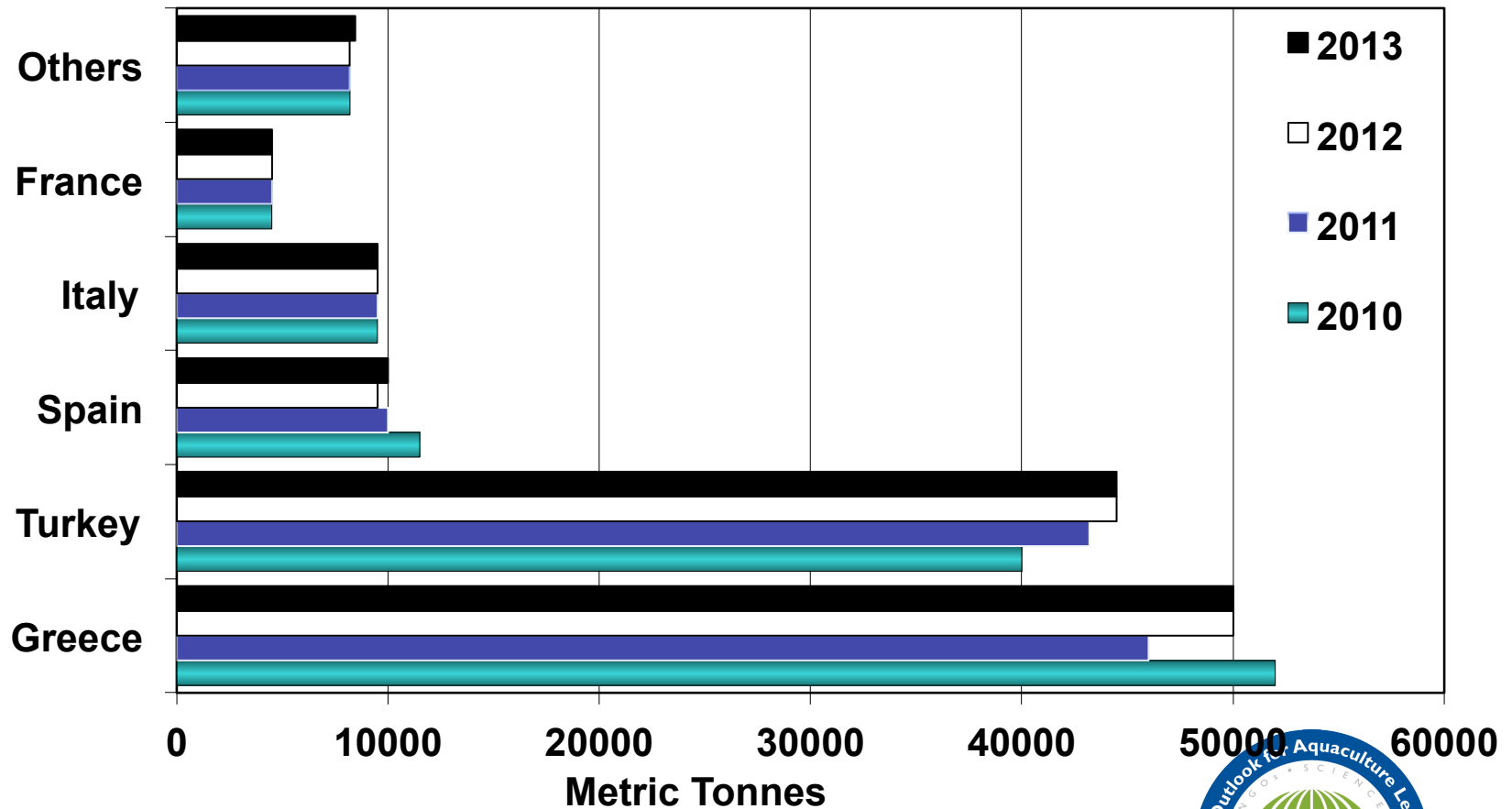
Seabream

Production in Mediterranean Countries



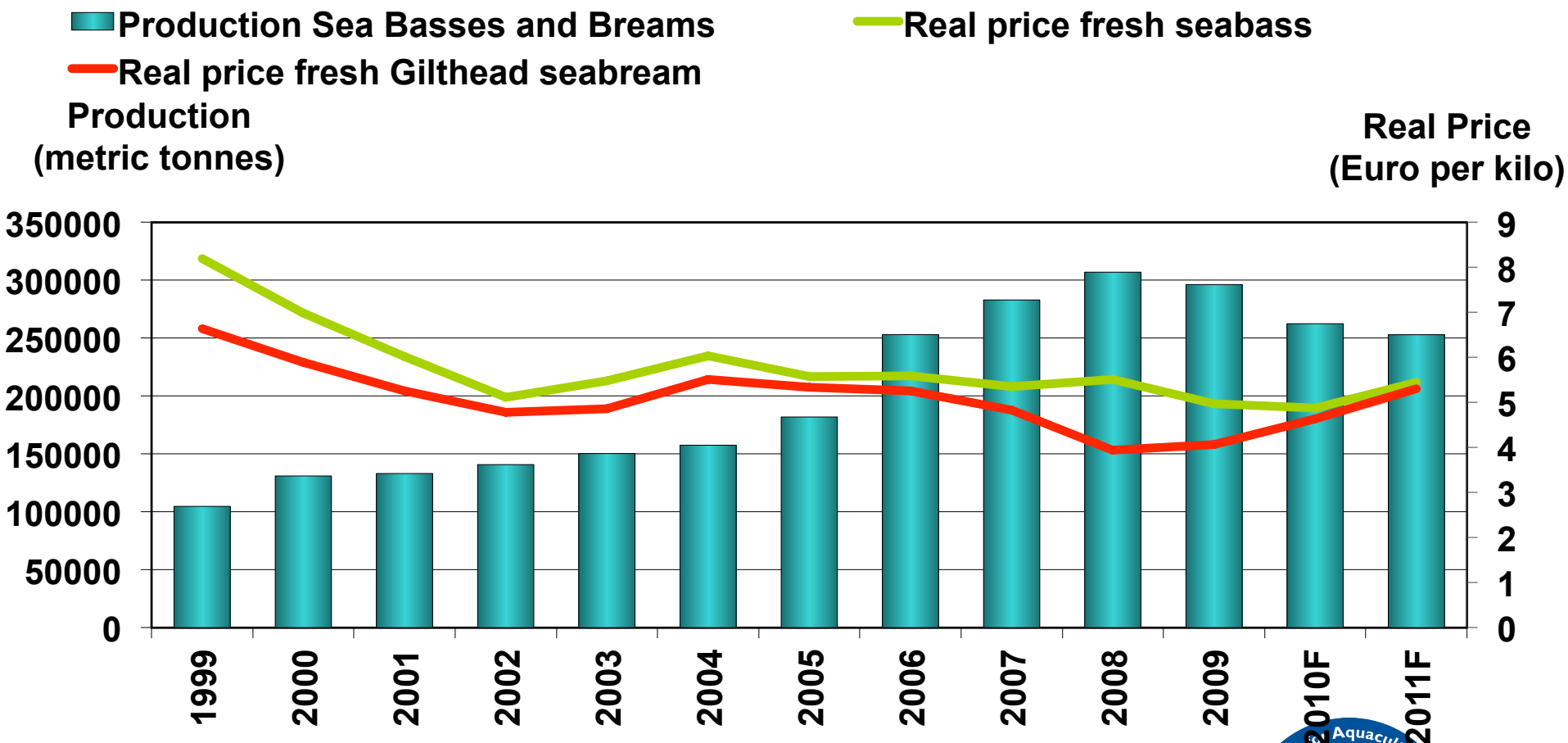
Seabass

Production in Mediterranean Countries



Seabass & Sea Bream

European Production & Real Italian Import Price



FLATFISHES



HADDOCK
FILLETS

Wild



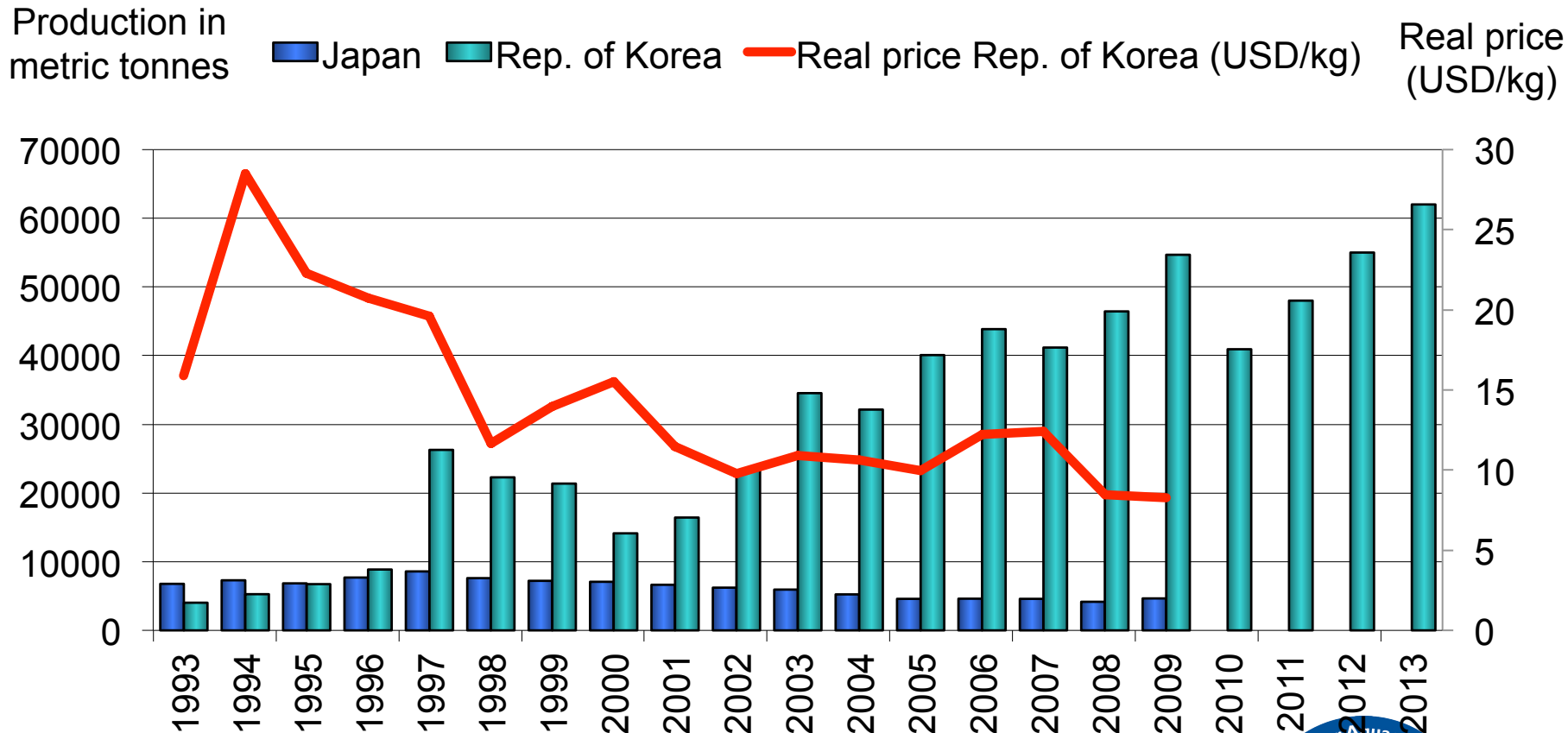
**FARMED
ATLANTIC HALIBUT**

Product of Canada

Farm-Raised

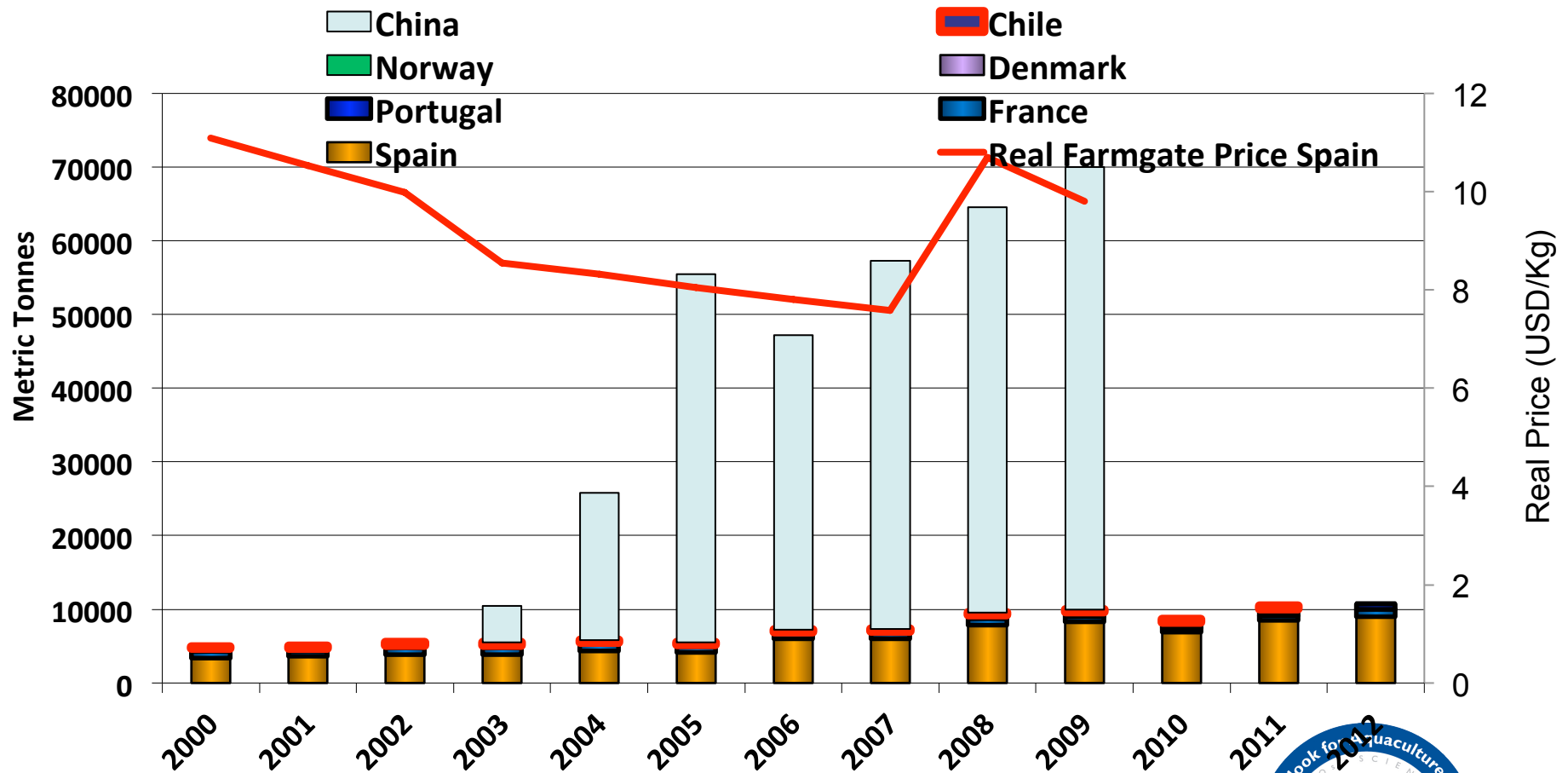
Olive Flounder

Production and real farmgate price



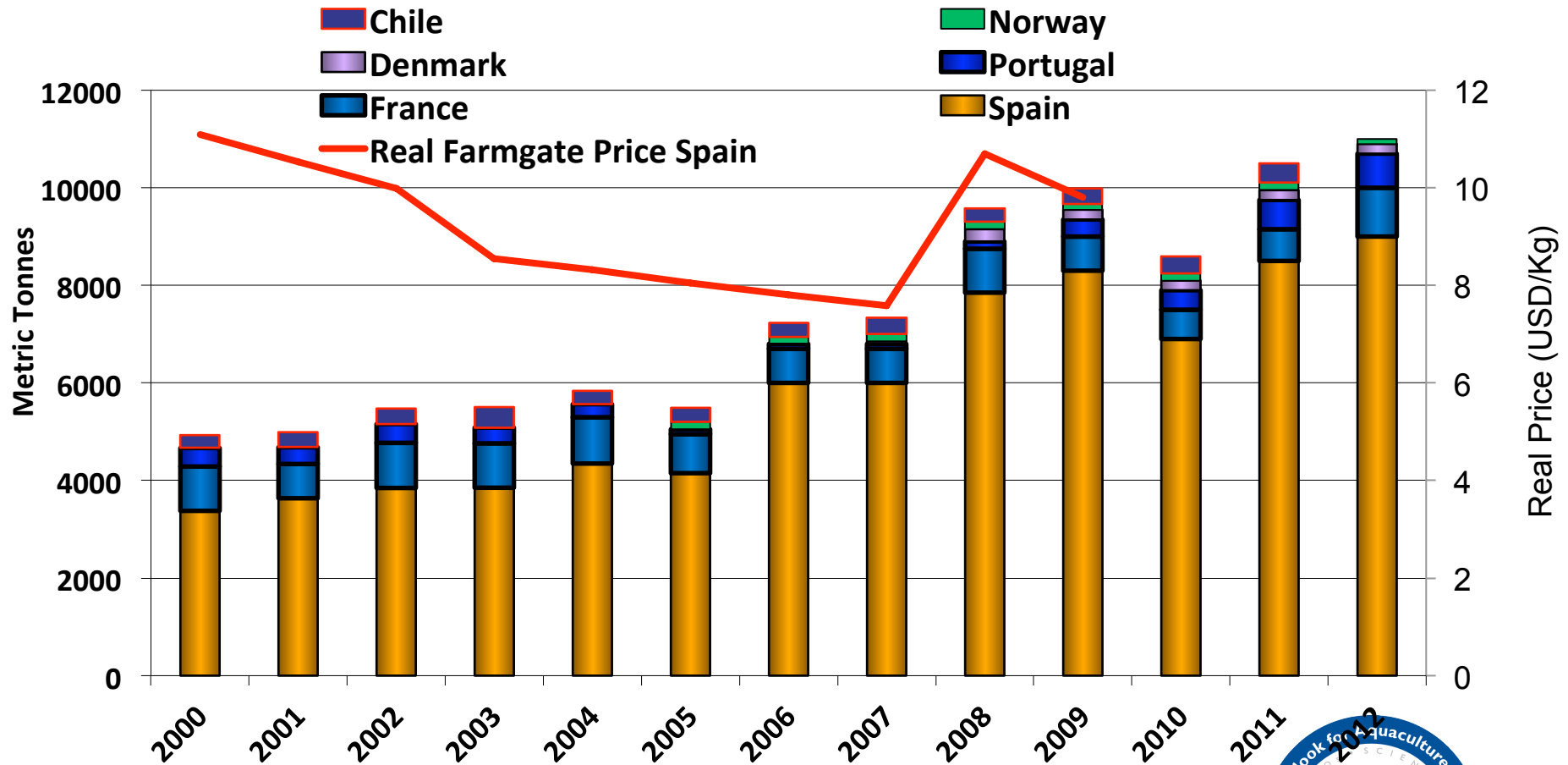
Turbot

Production in selected countries

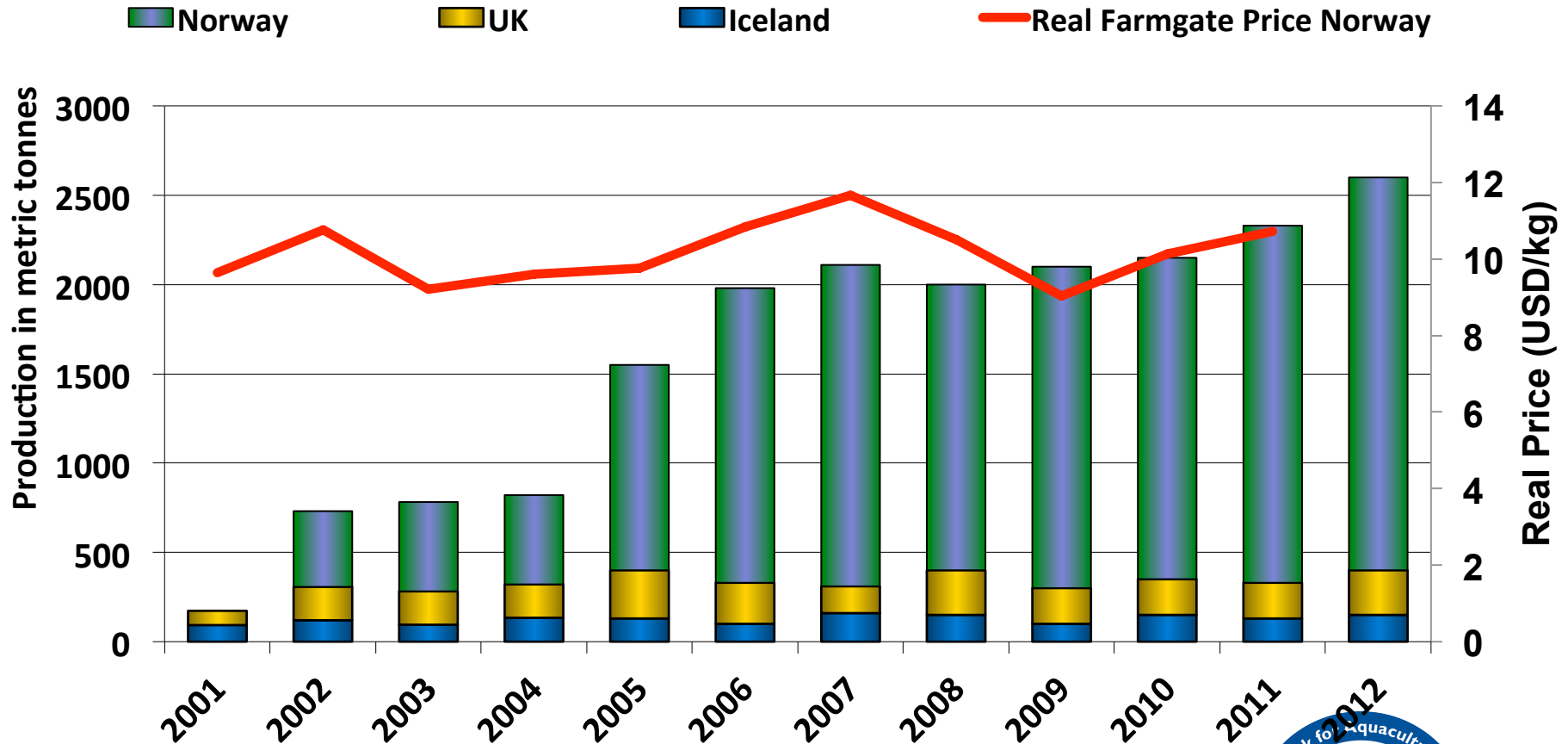


Turbot

Production in selected countries excl. China



Atlantic Halibut Production

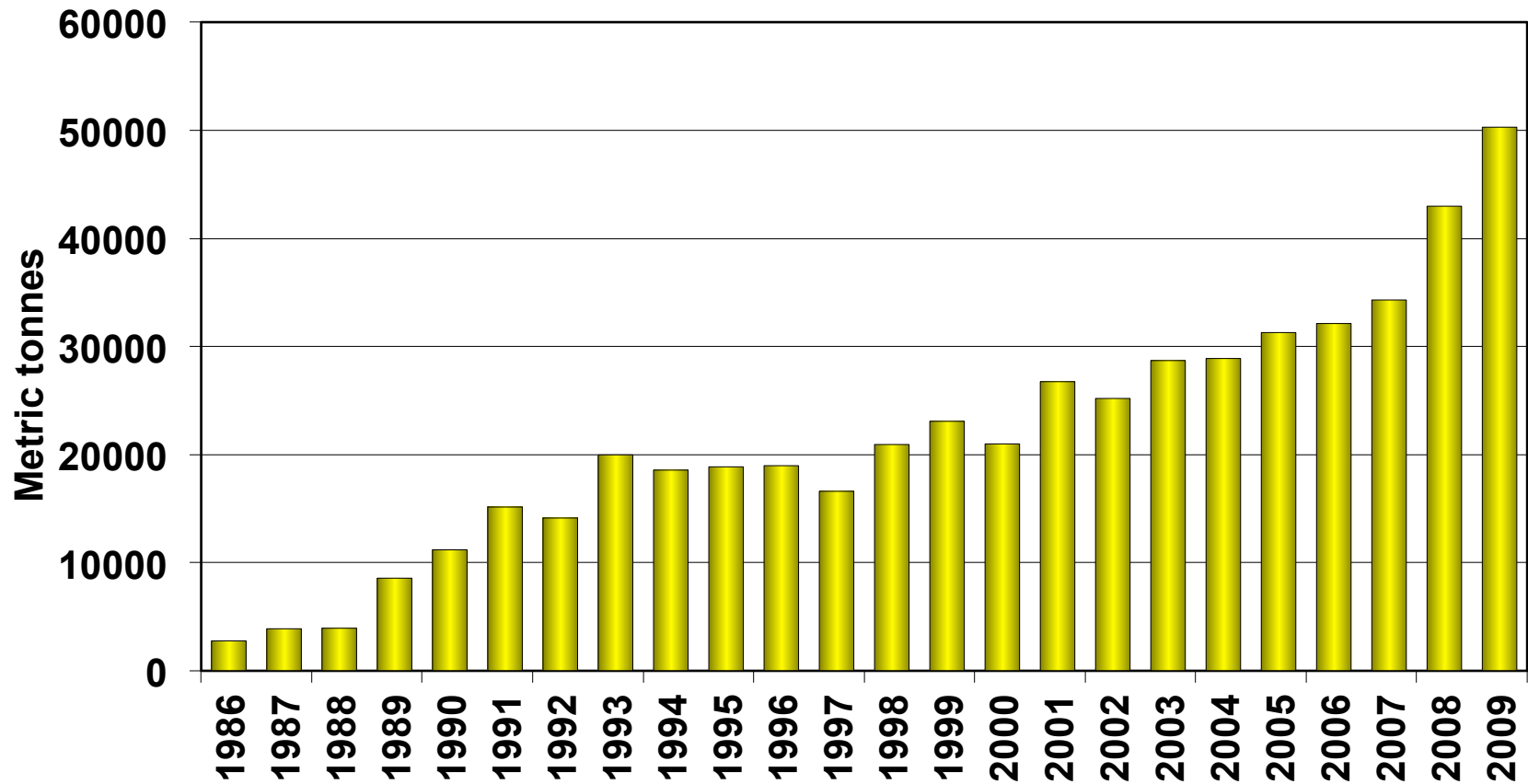


Barramundi



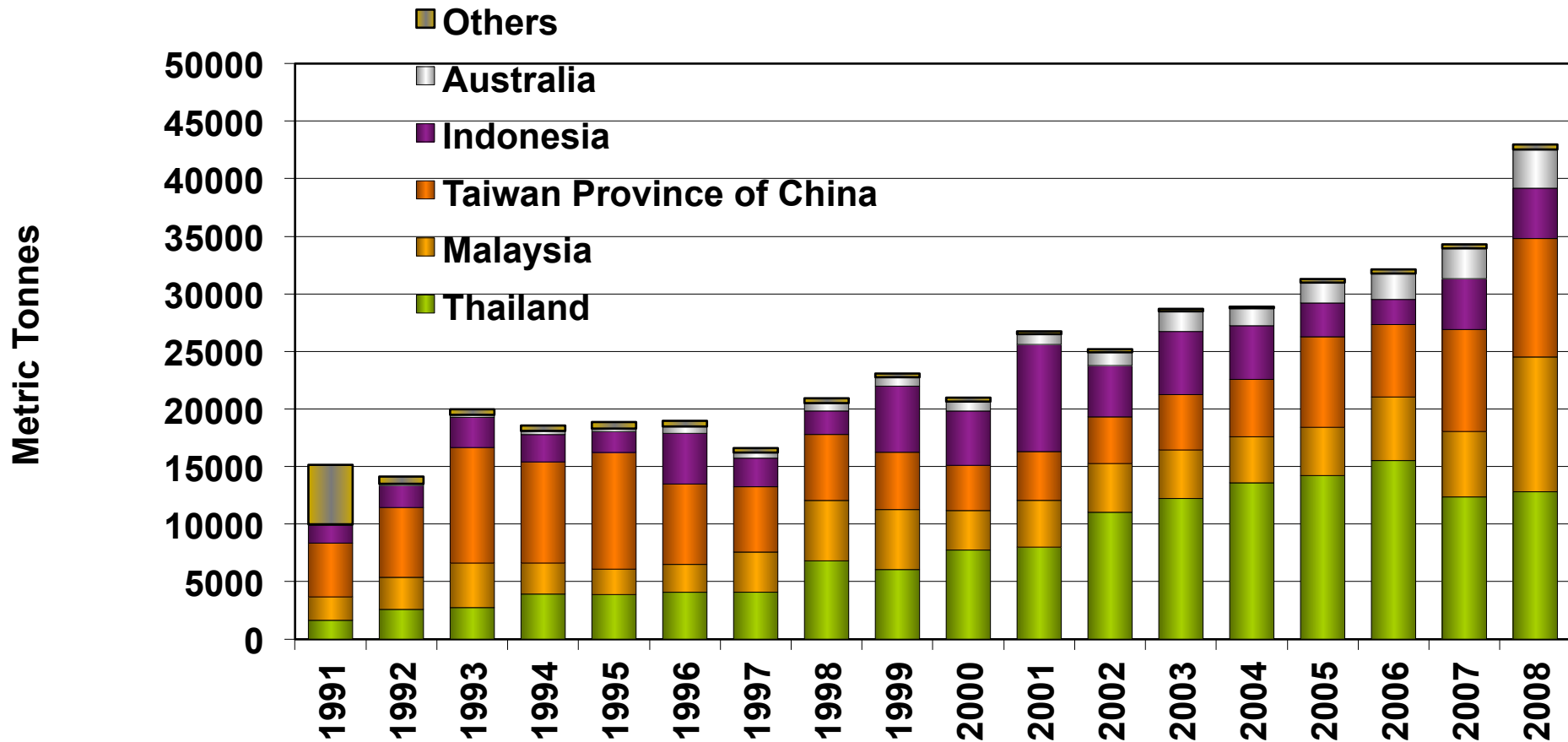
Barramundi

Total Production until 2009



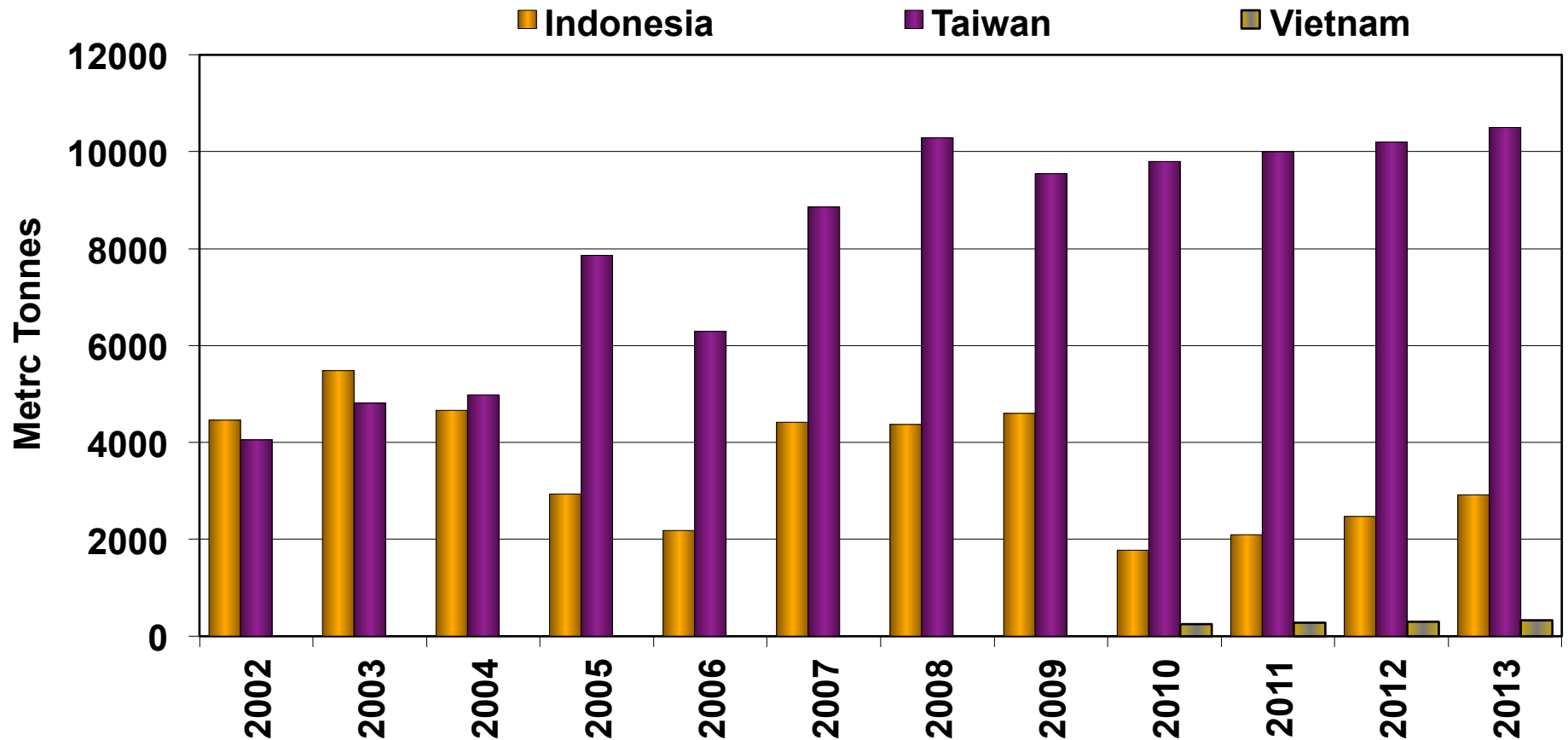
Barramundi

Major Producing Countries



Barramundi

Production forecasts for selected countries

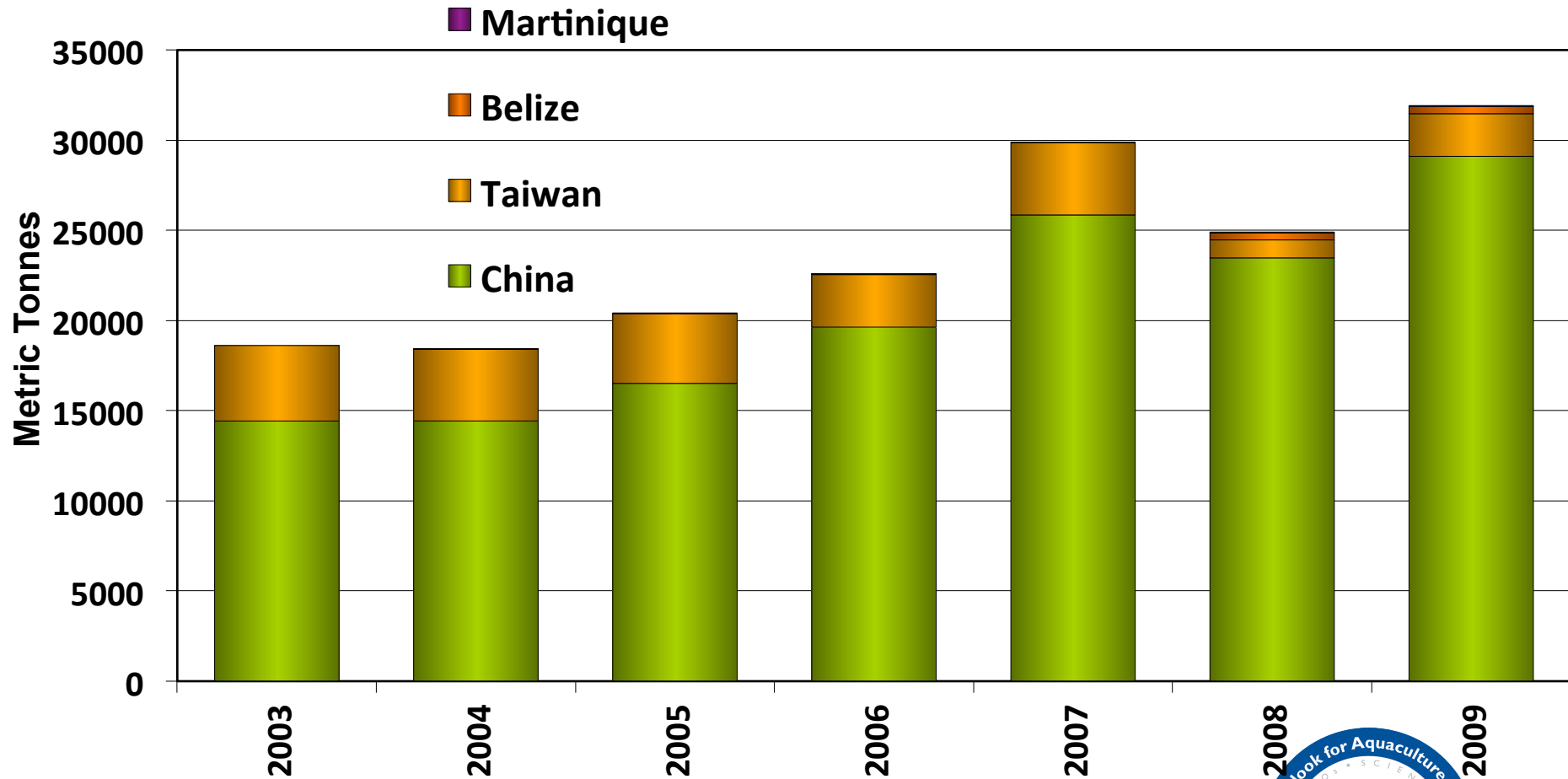


COBIA



Cobia

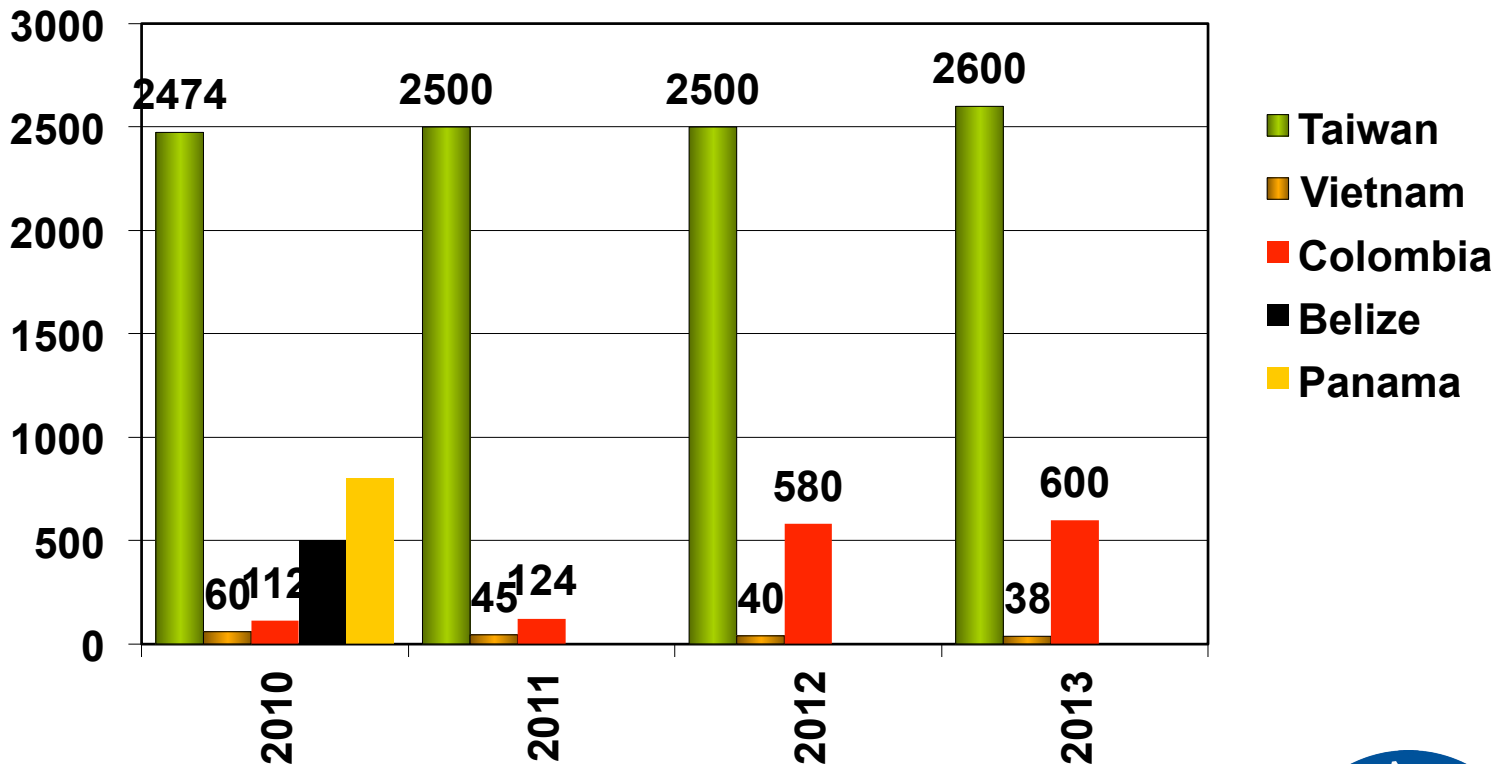
Major Producing Countries until 2009



Farmed Cobia

Estimates for countries excl. China

Metric Tonnes



ATLANTIC COD

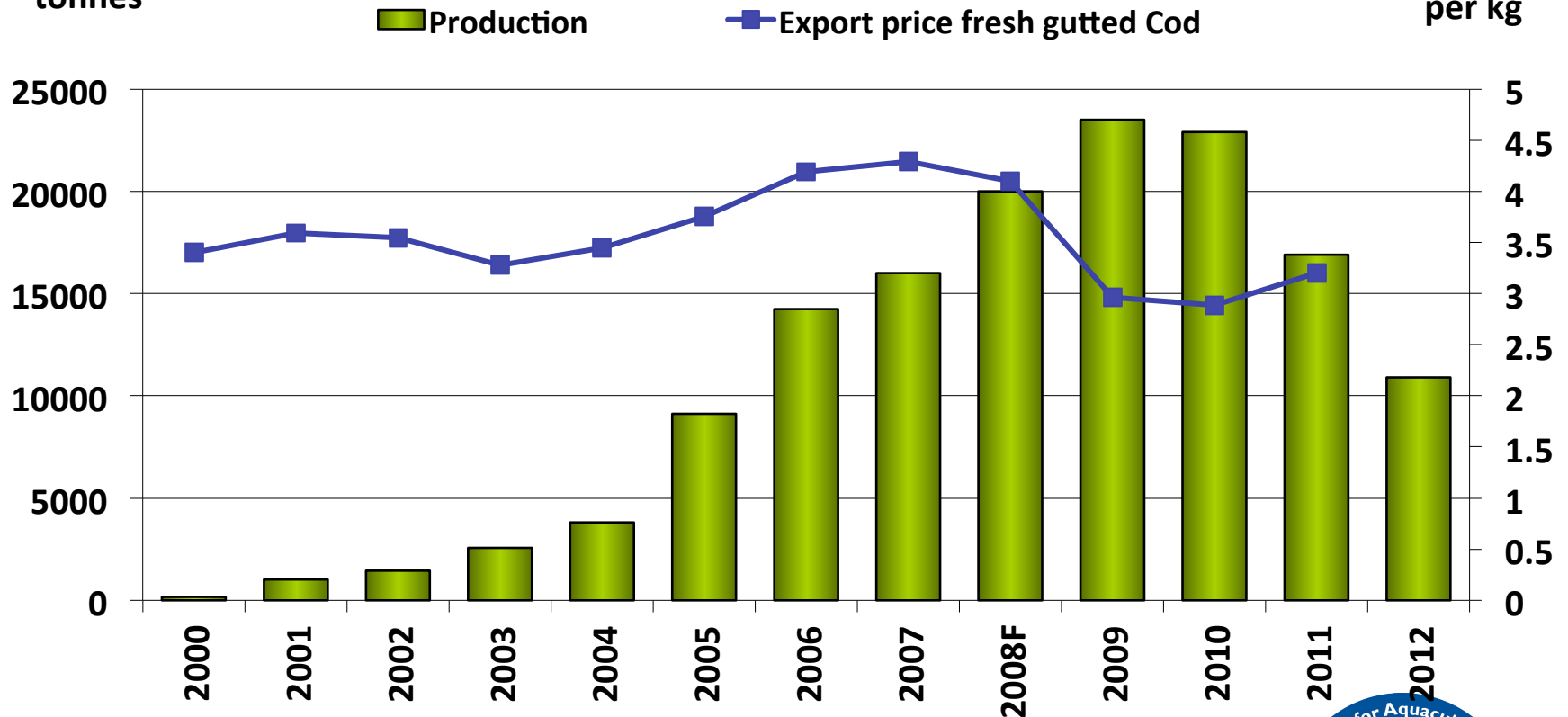


Atlantic Cod

Total Farmed Production and Norwegian Export price

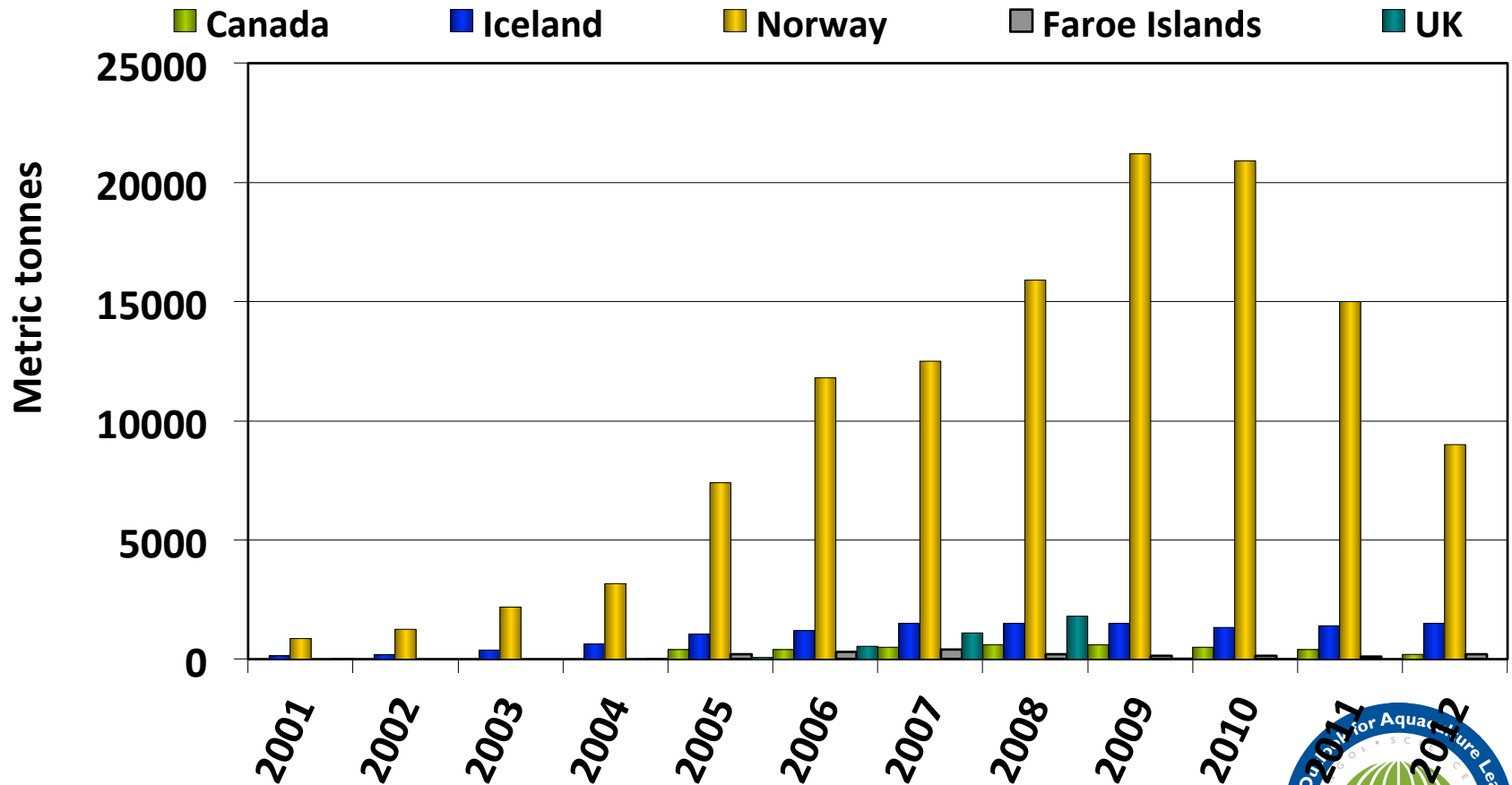
Production in metric
tonnes

Real price in Euro
per kg



Atlantic Cod

Farmed Production by Country

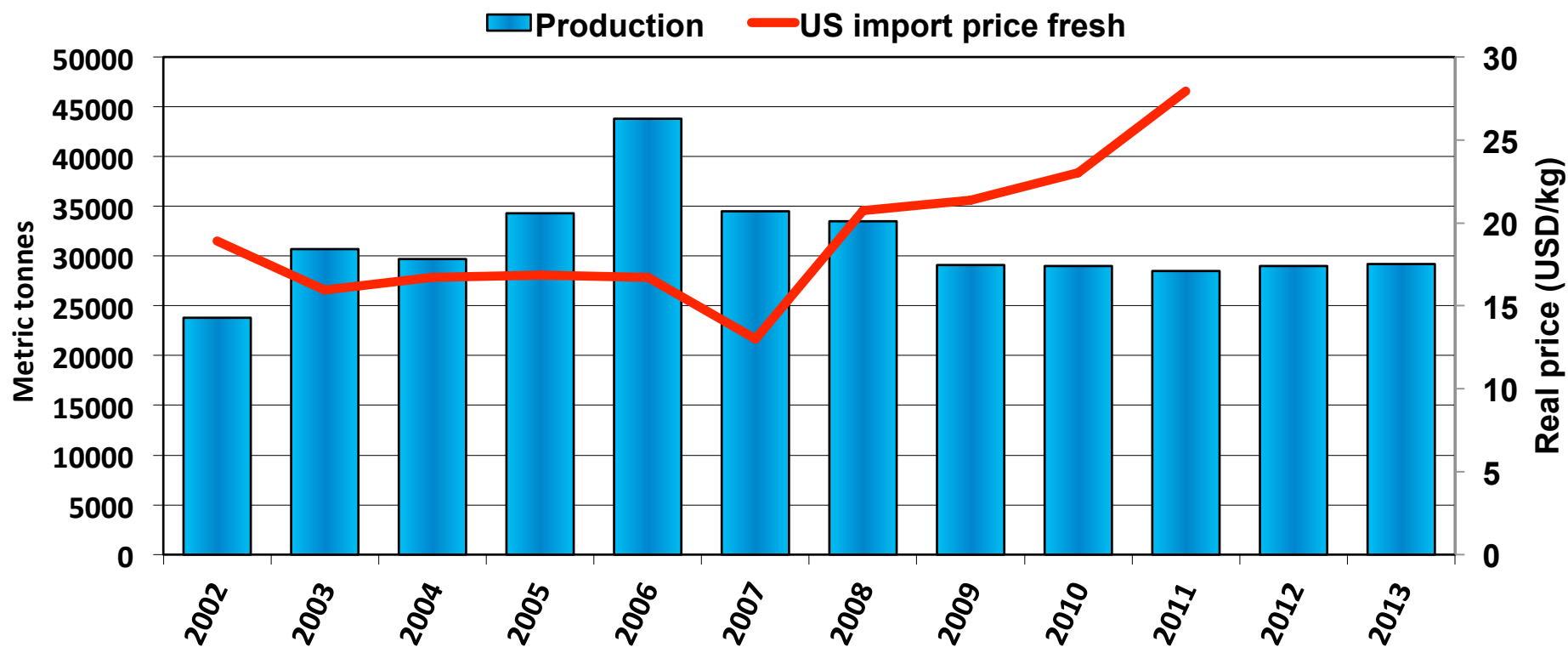


TUNAS



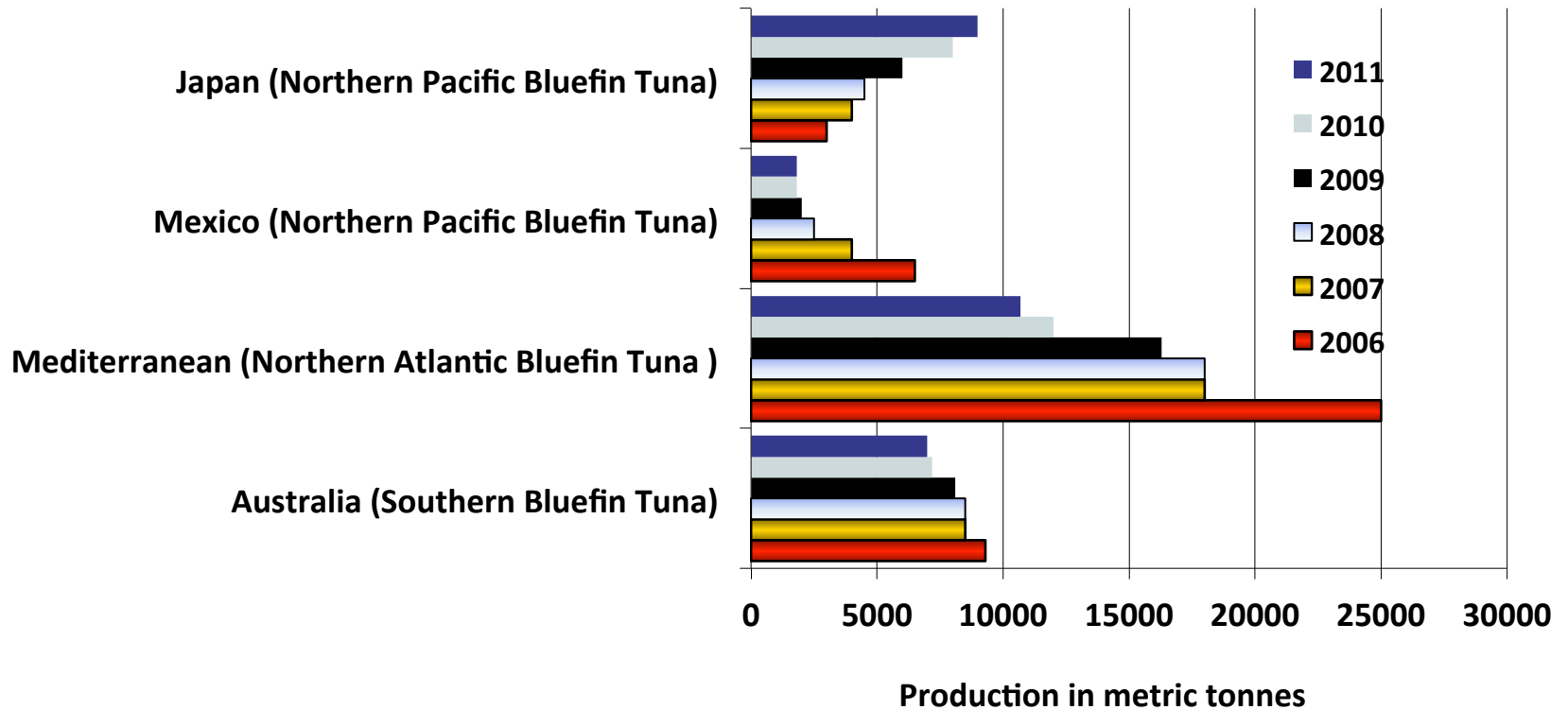
Bluefin Tuna

Total Production and US real import price fresh



Bluefin Tuna

Production by Region

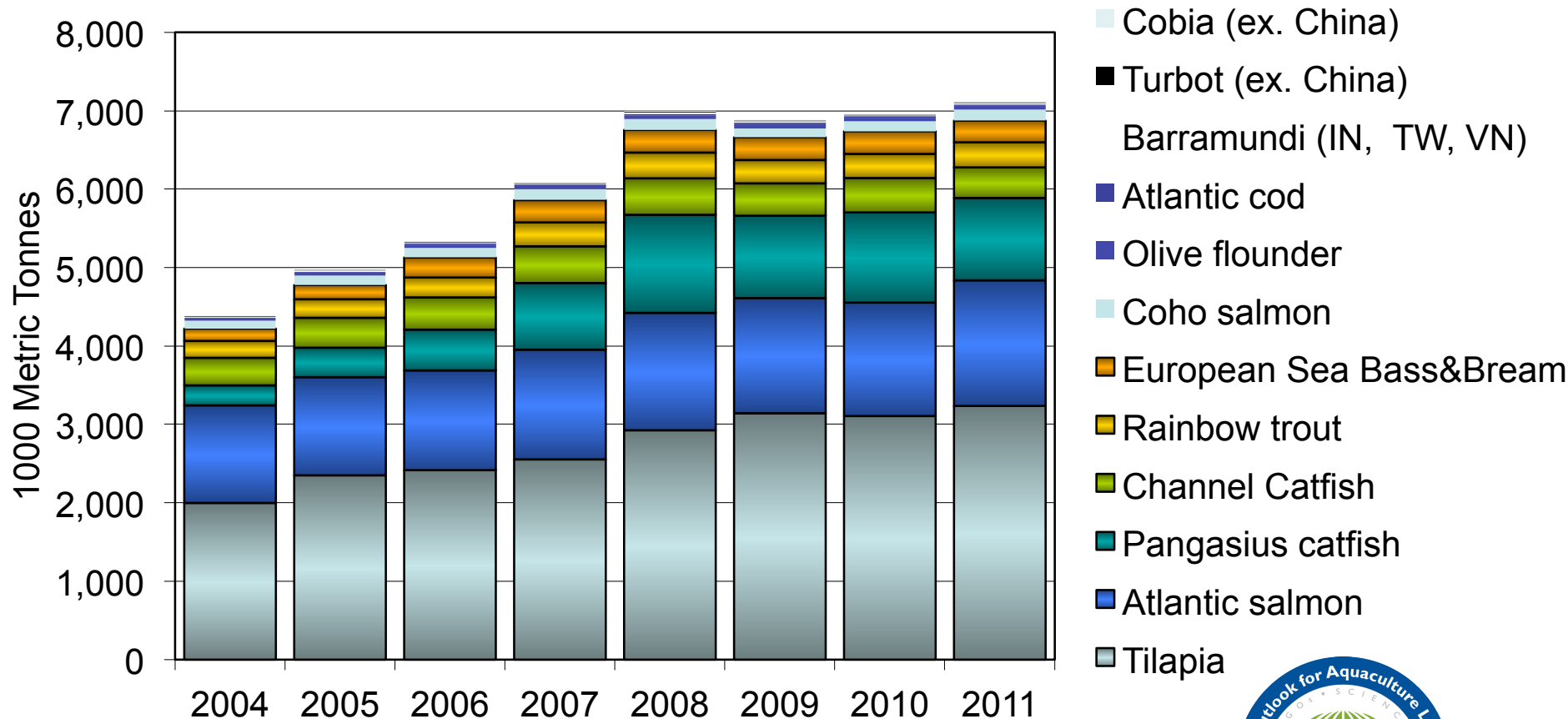


Summary



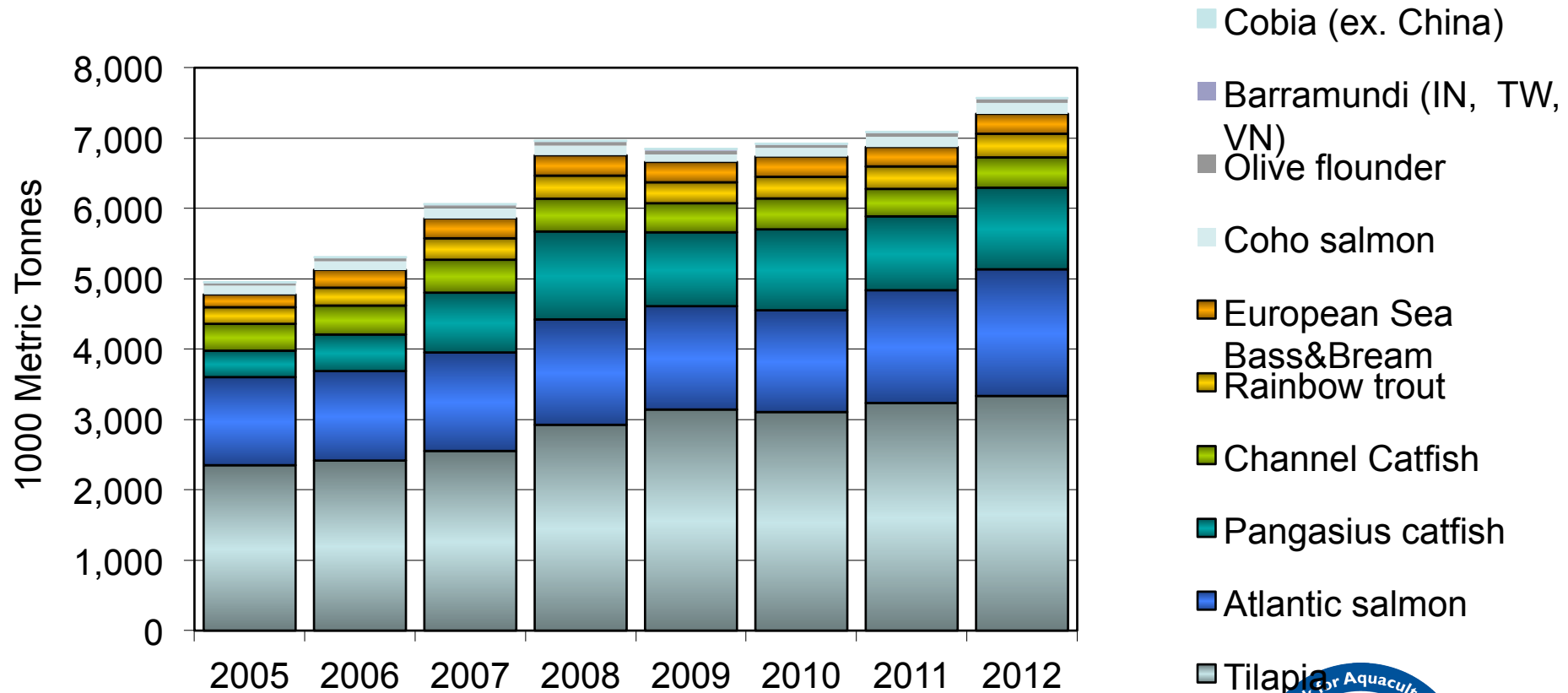
Production of Surveyed Species

2004-2011

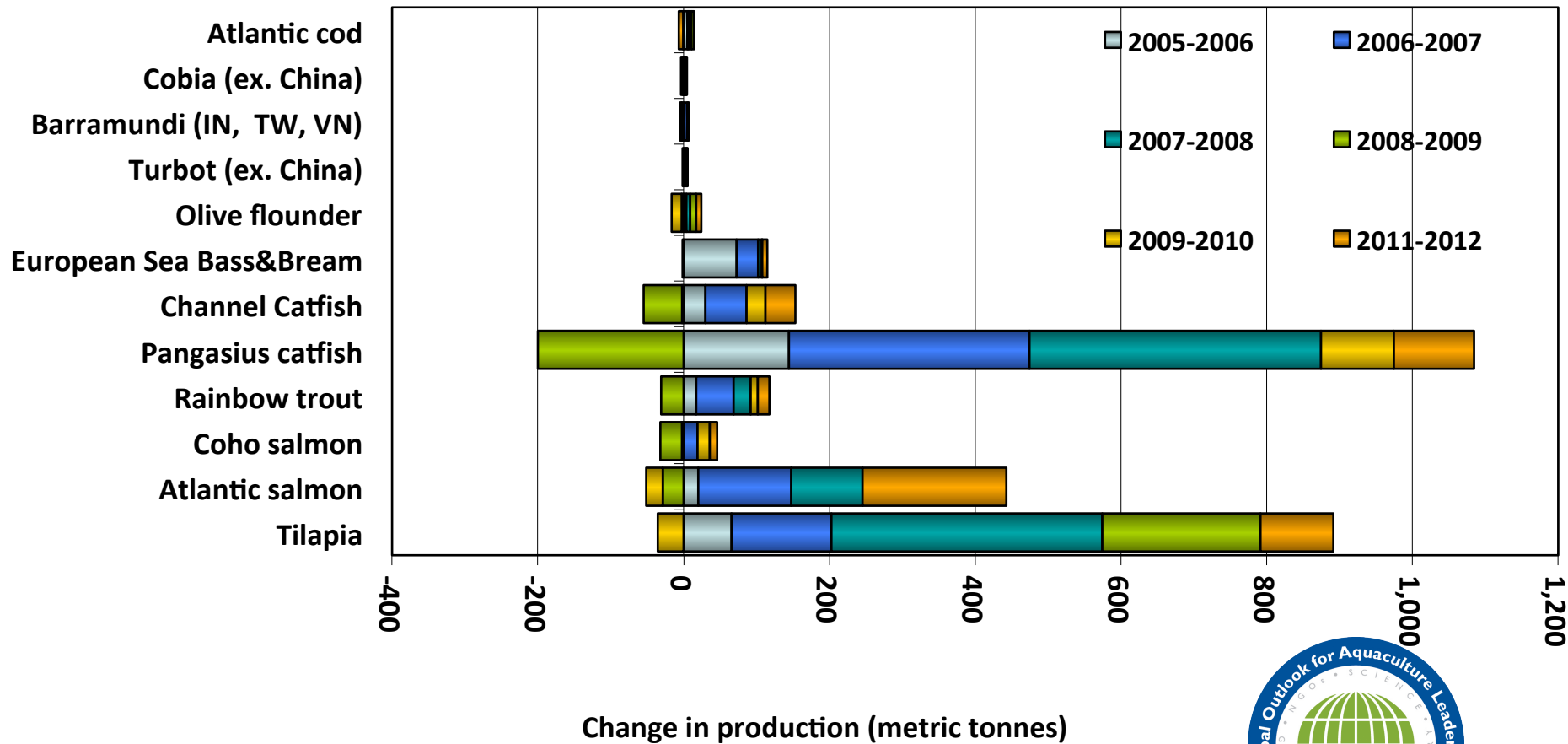


Production of Surveyed Species

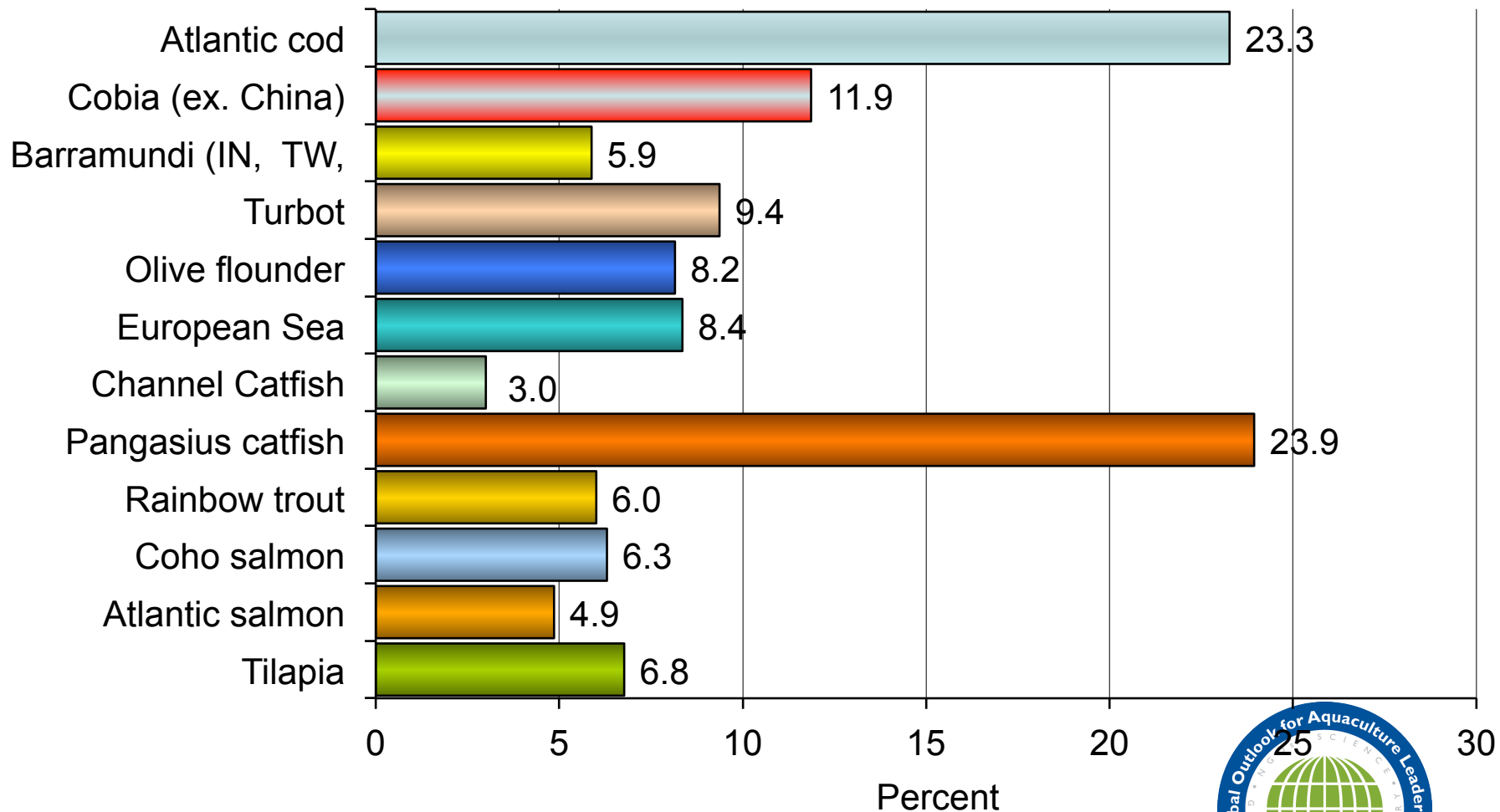
2005-2012



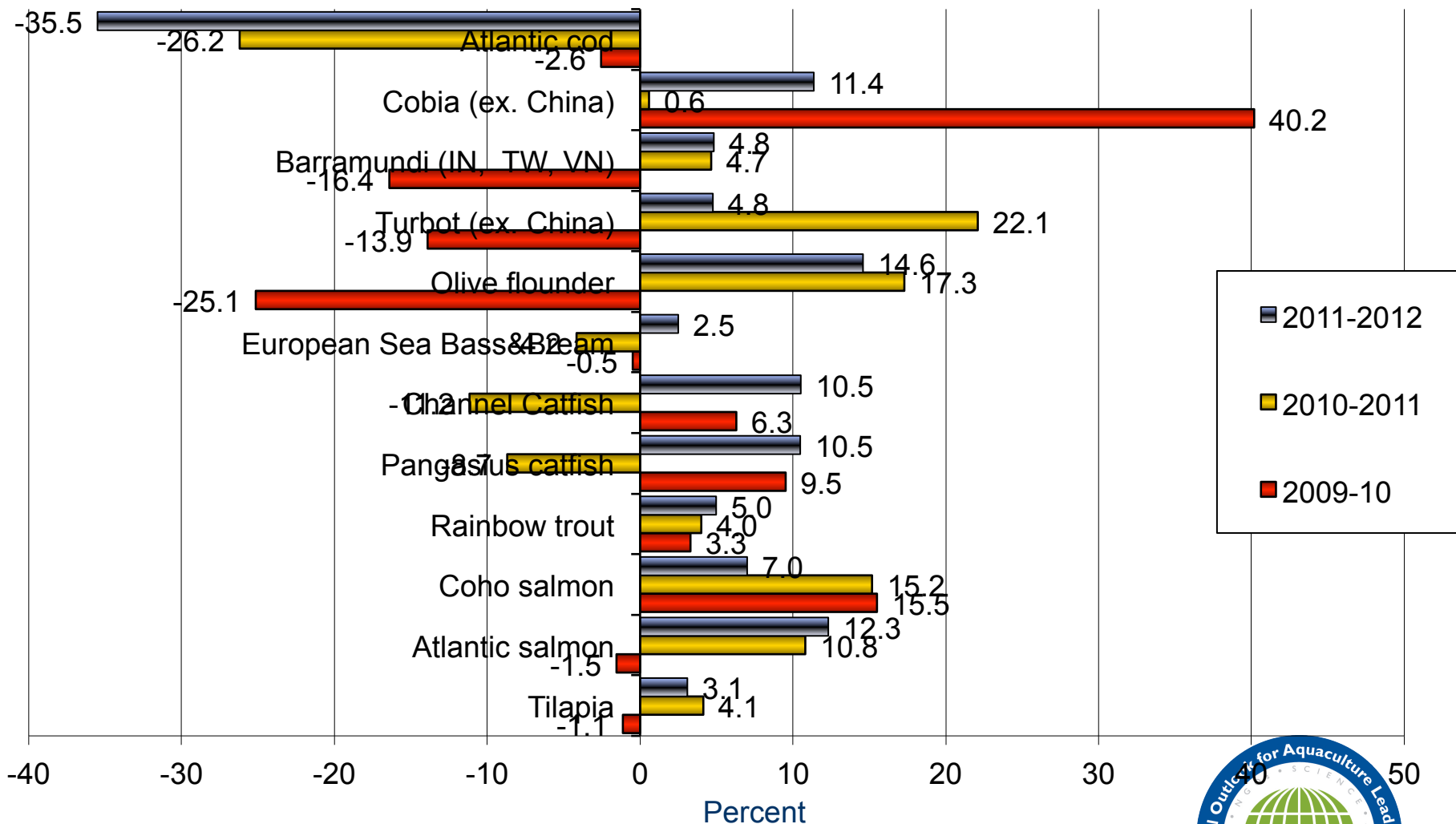
Cumulative Change in Production 2005-2012



Average Annual Growth Rate 2003-2011



Annual Percent Growth Rates 2009-2012



Thank You!

