

*Global Aquaculture  
Production Survey and  
Forecast*

*October, 2020  
Gorjan Nikolik  
RaboResearch*

*Fin Fish: presented by the  
Global Aquaculture Alliance  
and Rabobank*



**Rabobank**

# Acknowledgements

Many thanks to

- All the survey respondents
- Darryl Jory from GAA
- Ragnar Nystøyl from Kontali

KONTALI



# Salmonids

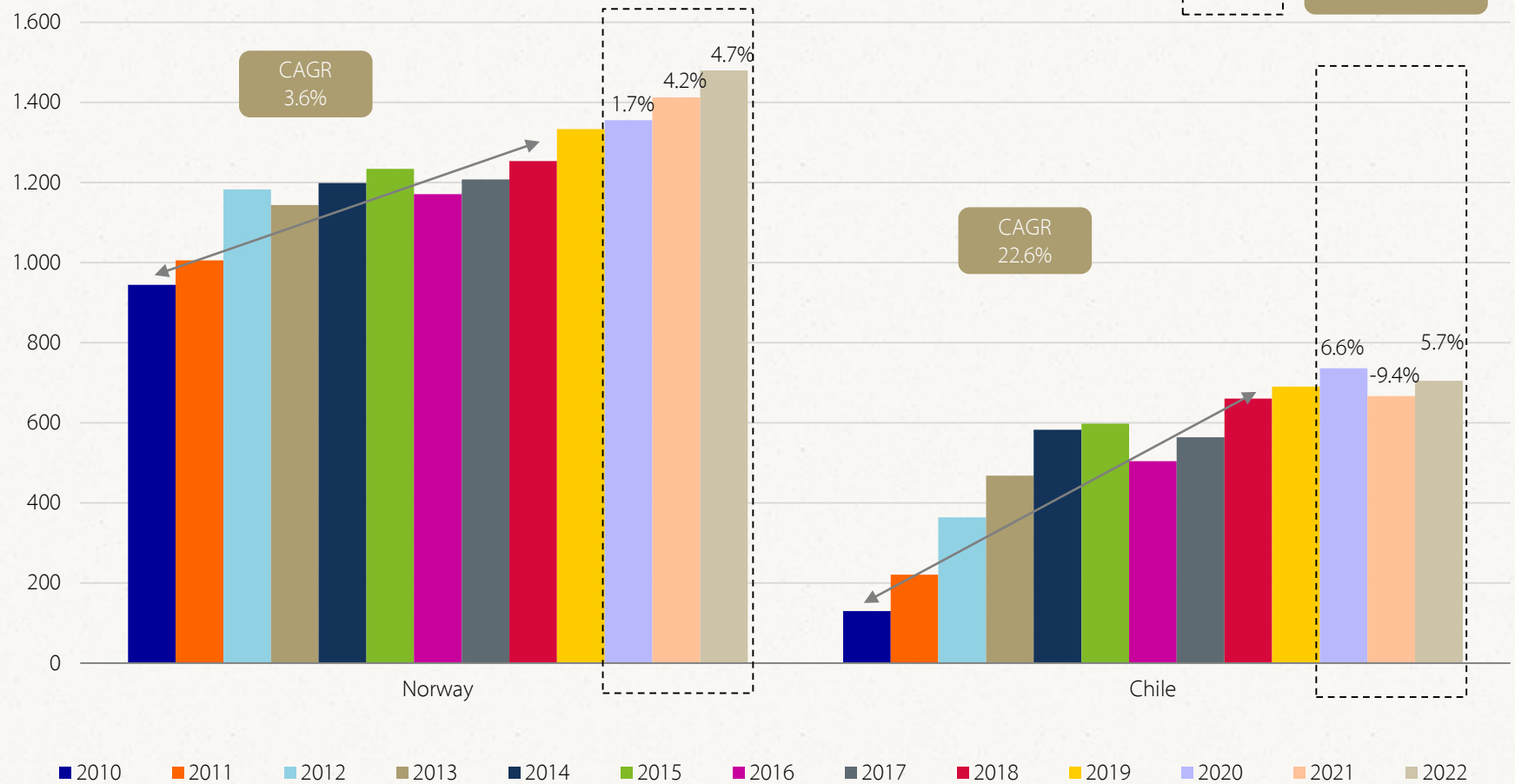


Rabobank

# Norway and Chile Atlantic Salmon production and forecast

Atlantic Salmon production and forecast by Kontali

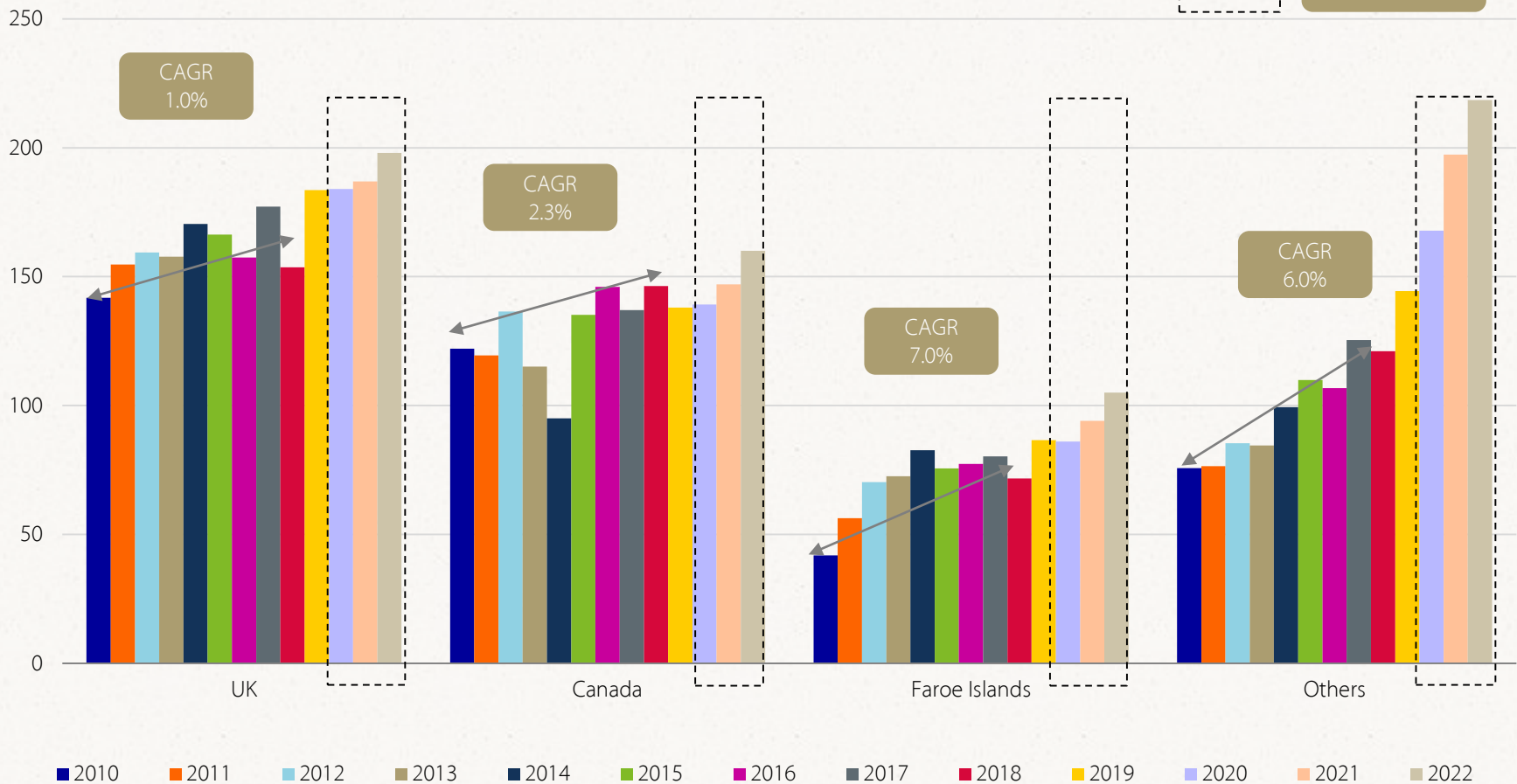
'000 tonnes



# All others Atlantic Salmon production and forecast

Atlantic Salmon production and forecast by Kontali

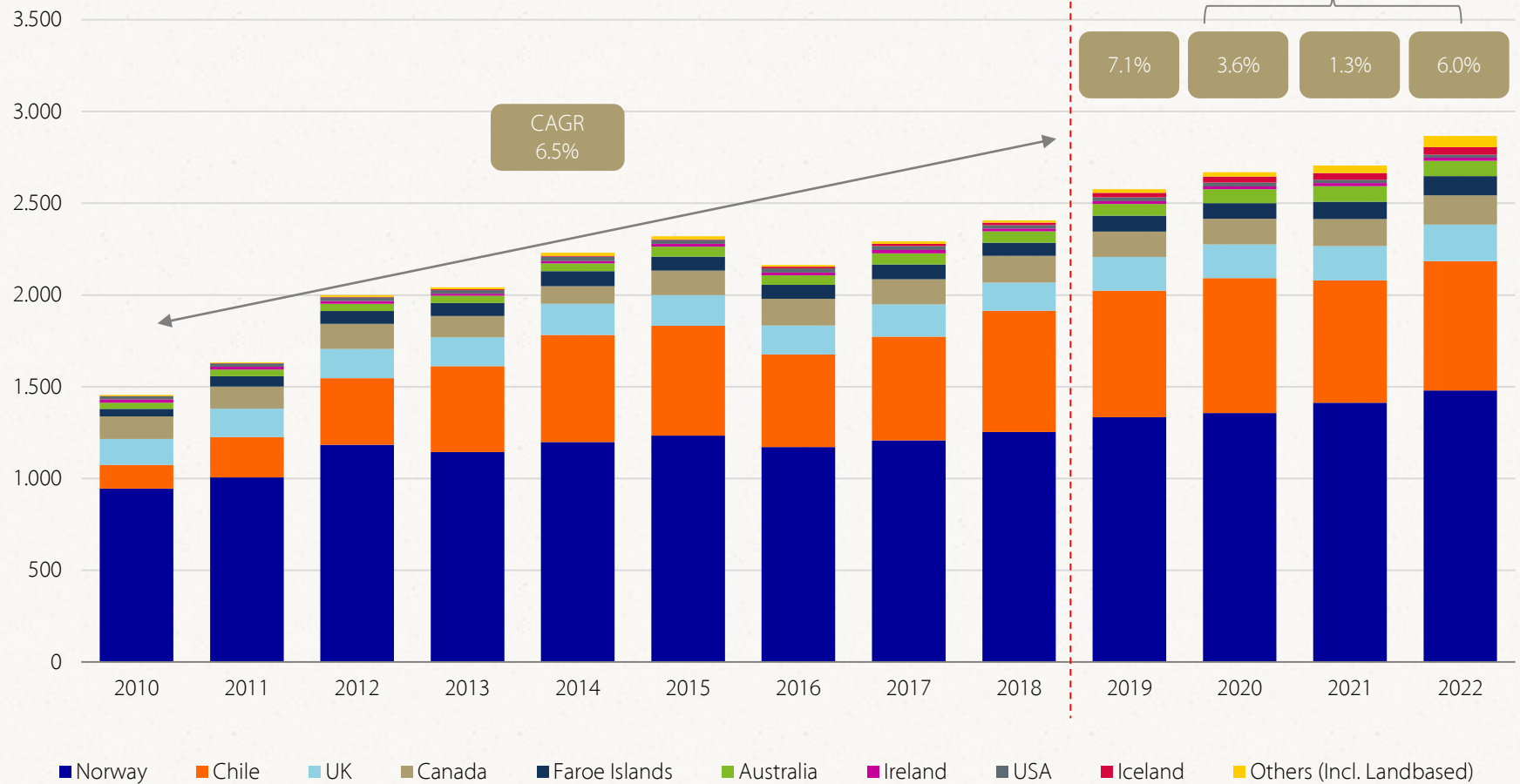
'000 tonnes



# Atlantic Salmon production forecast

## Atlantic Salmon production Kontali

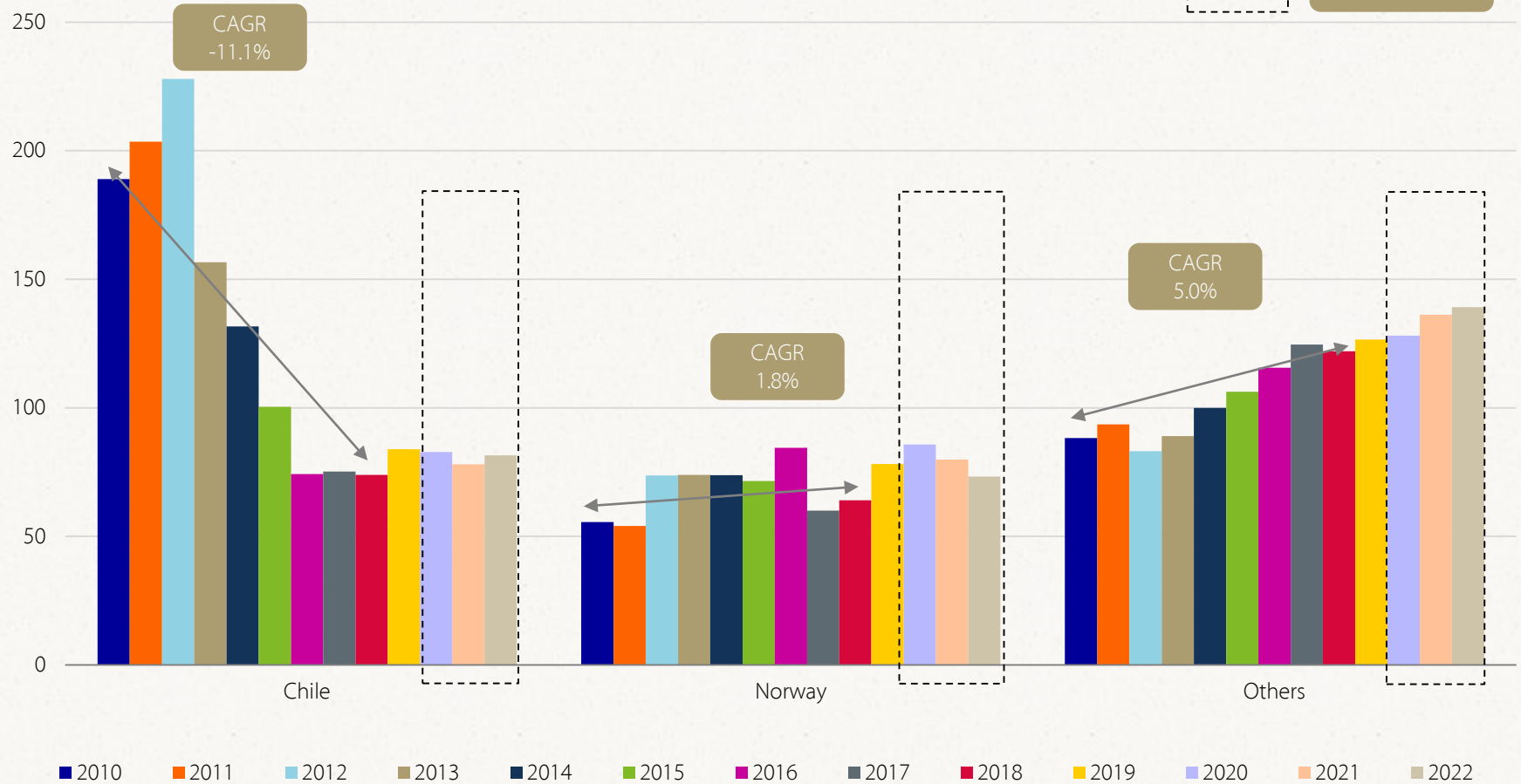
'000 tonnes



# Large Rainbow Trout production and forecast

## Large Rainbow Trout production

'000 tonnes



Source: Kontali 2020  
Others include Finland, China, Russia, Denmark, Sweden, France, Turkey, Others

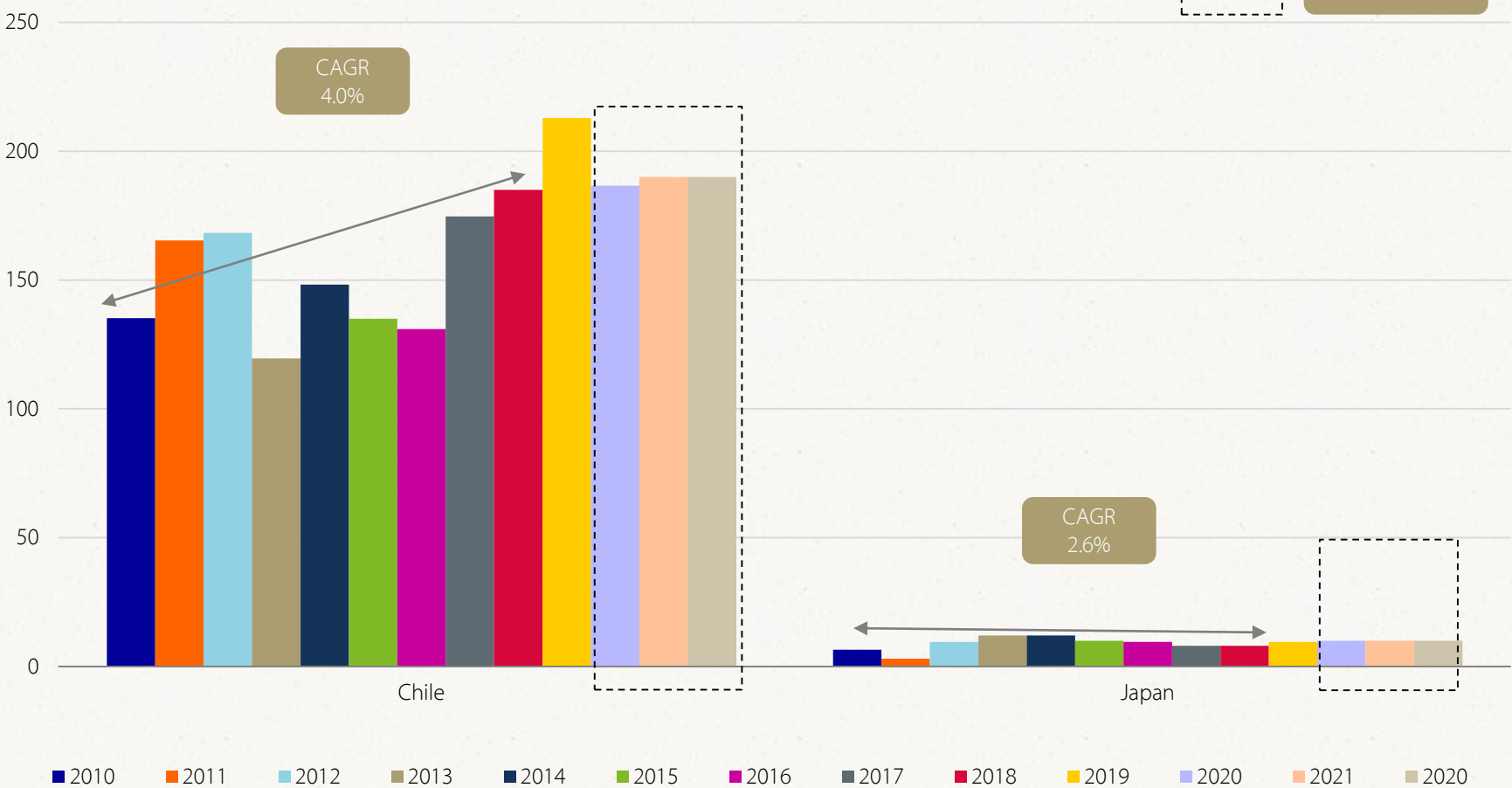


Rabobank

# Coho production and forecast

## Coho Salmon production

'000 tonnes



Source: Kontali 2020





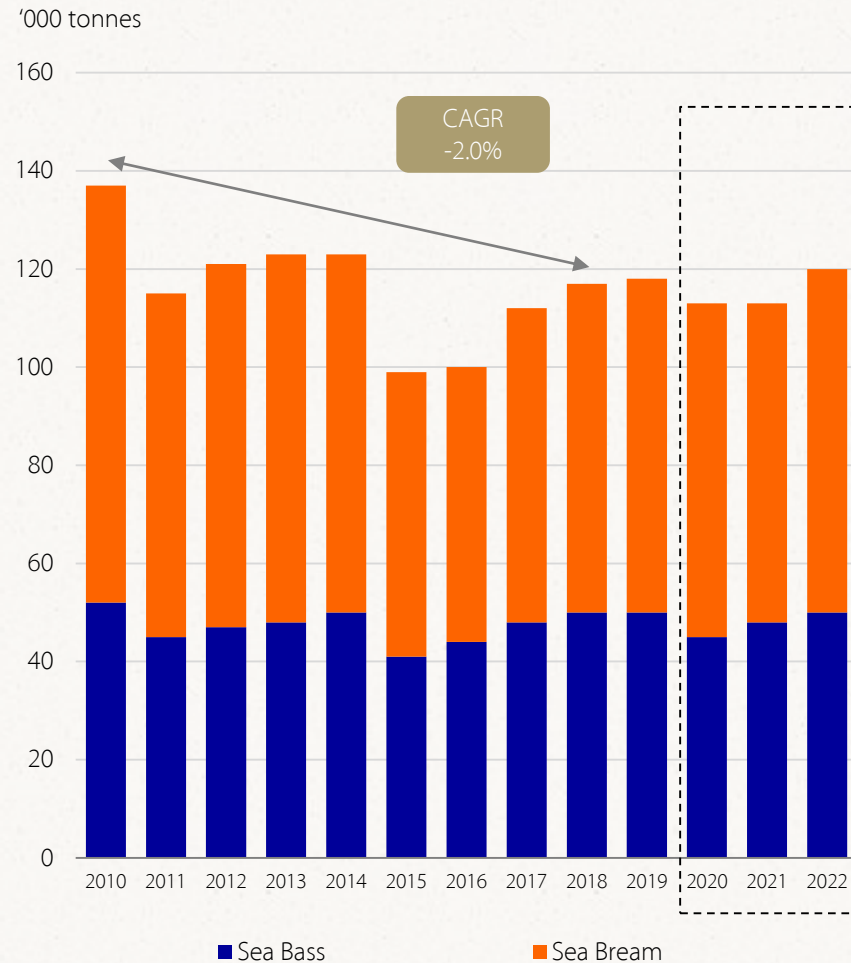
# Sea Bass and Sea Bream



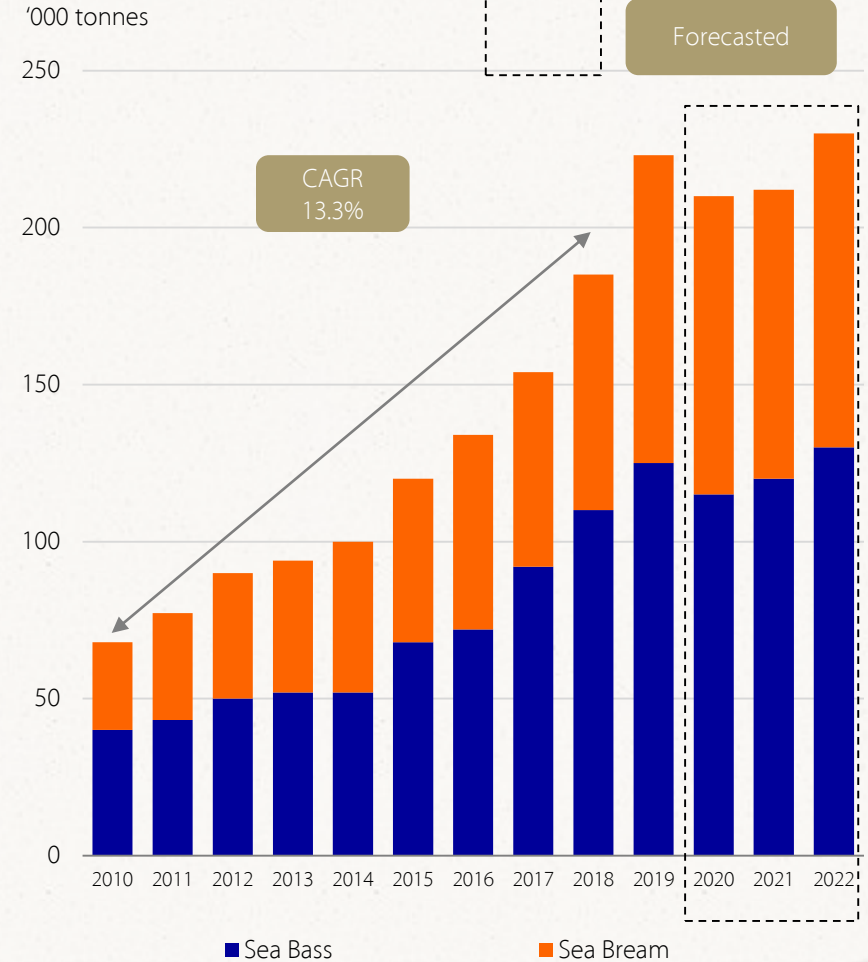
Rabobank

# Sea Bass and Seabream production and forecast

## Greece Sea Bass and Seabream production



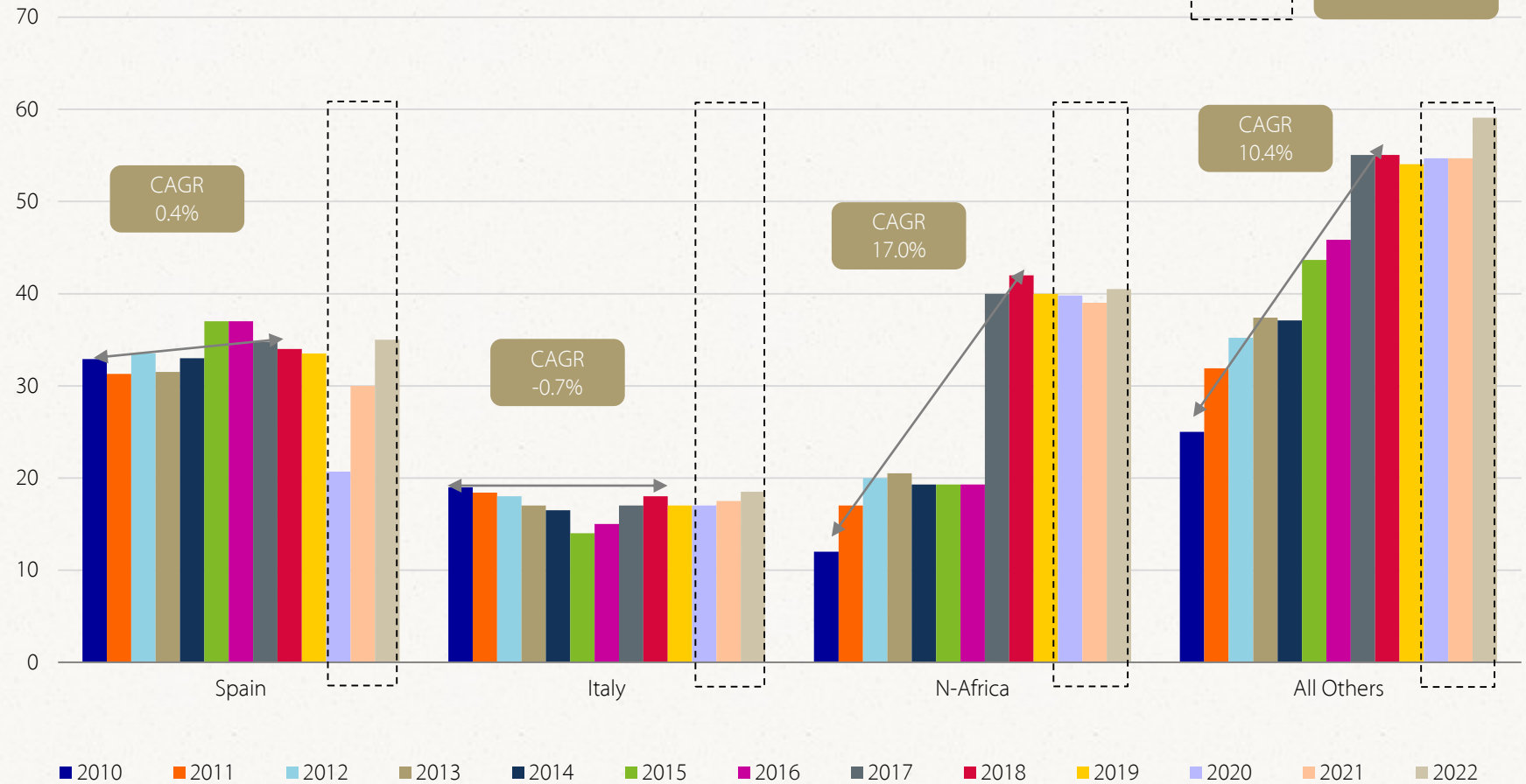
## Turkey Sea Bass and Seabream production



# Mediterranean - European Sea Bass and Seabream production

## Sea Bass and Seabream production

'000 tonnes



Source: Kontali 2020  
All others: Croatia, Malta, Portugal, Israel, Cyprus

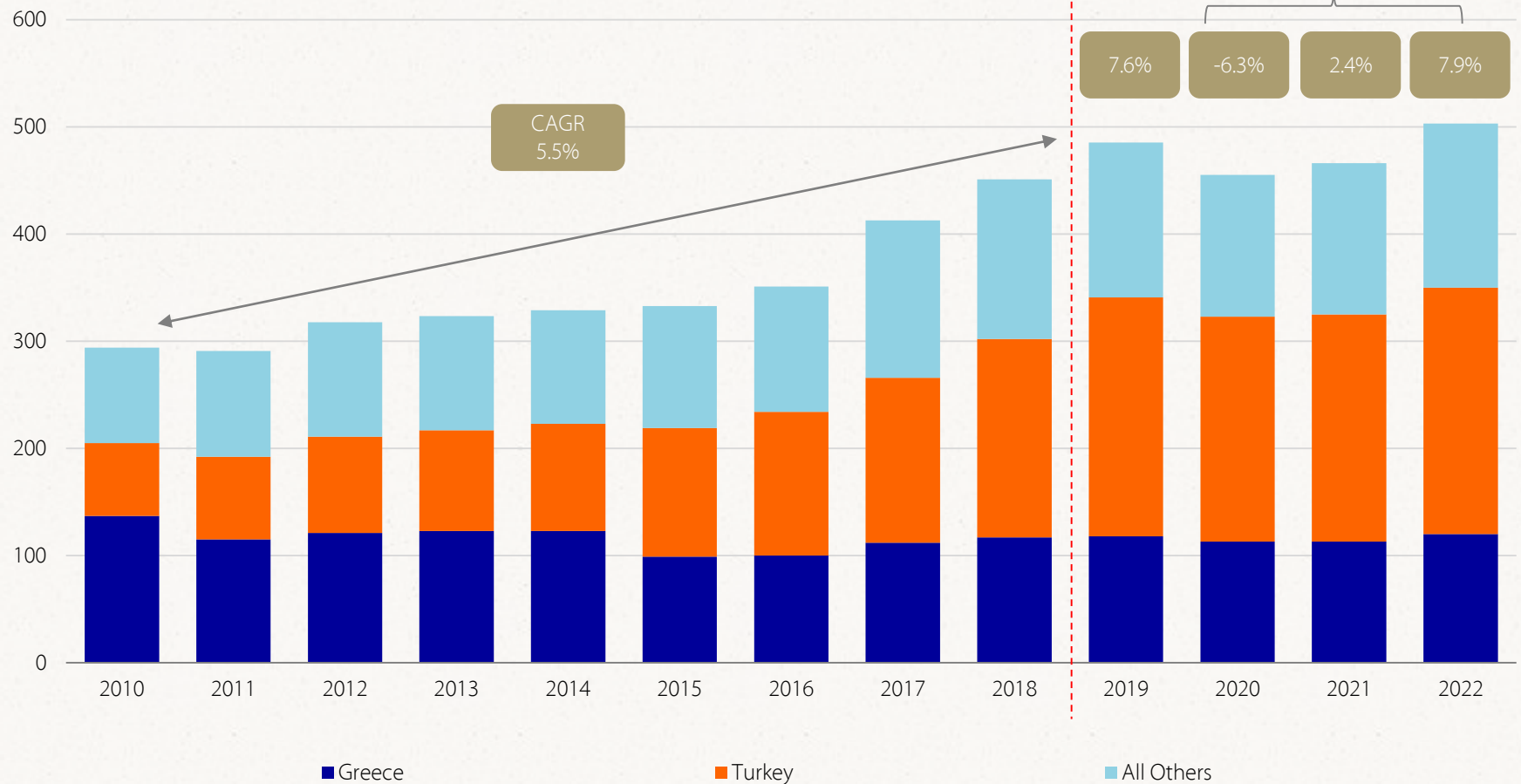


Rabobank

# Sea Bass and Seabream production and Kontali forecast

Sea Bass and Seabream production Kontali

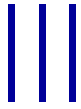
'000 tonnes



Source: Kontali 2020



Rabobank



Tilapia

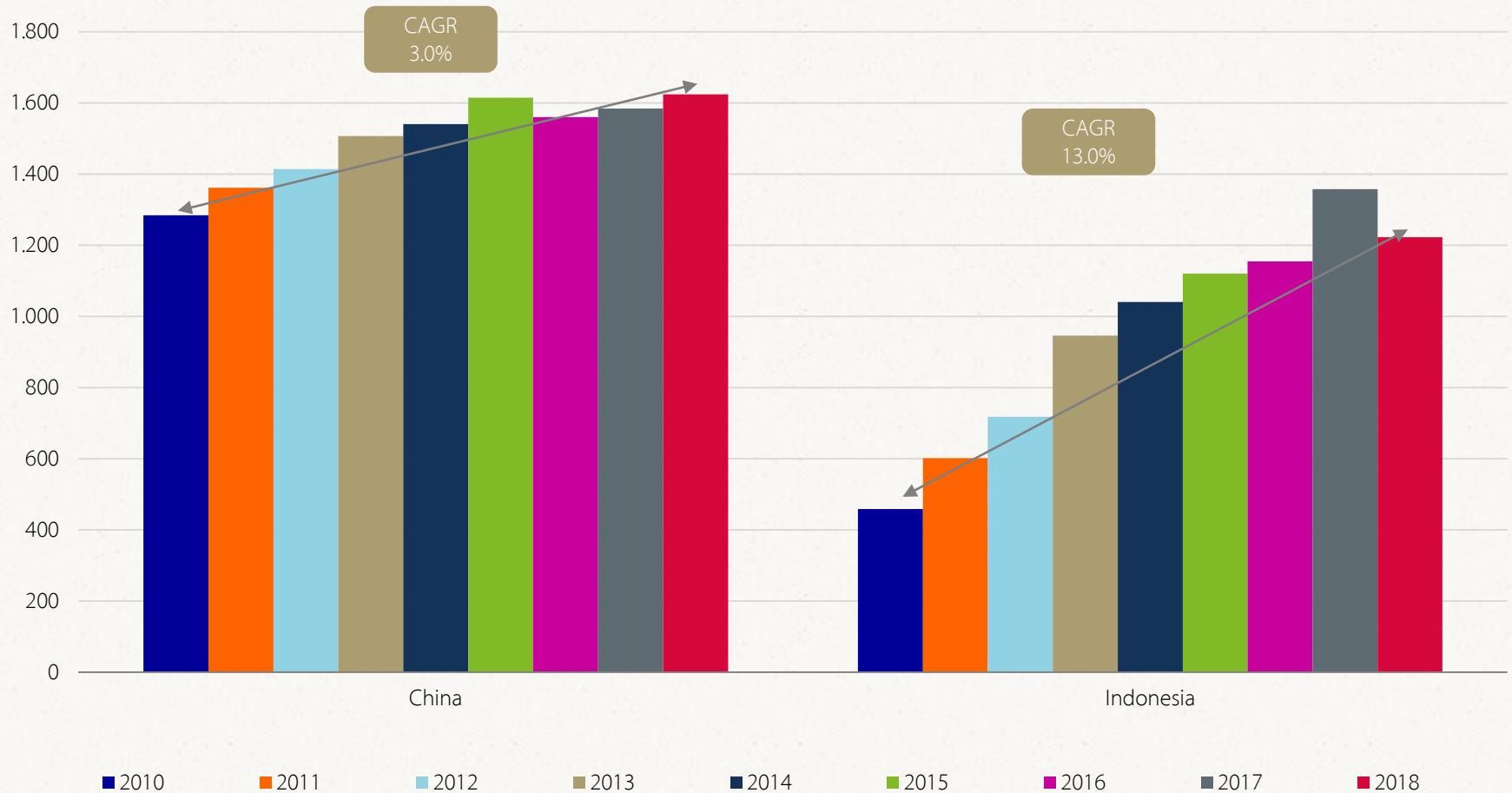


Rabobank

# China and Indonesia FAO production

## Tilapias and other cichlids production FAO

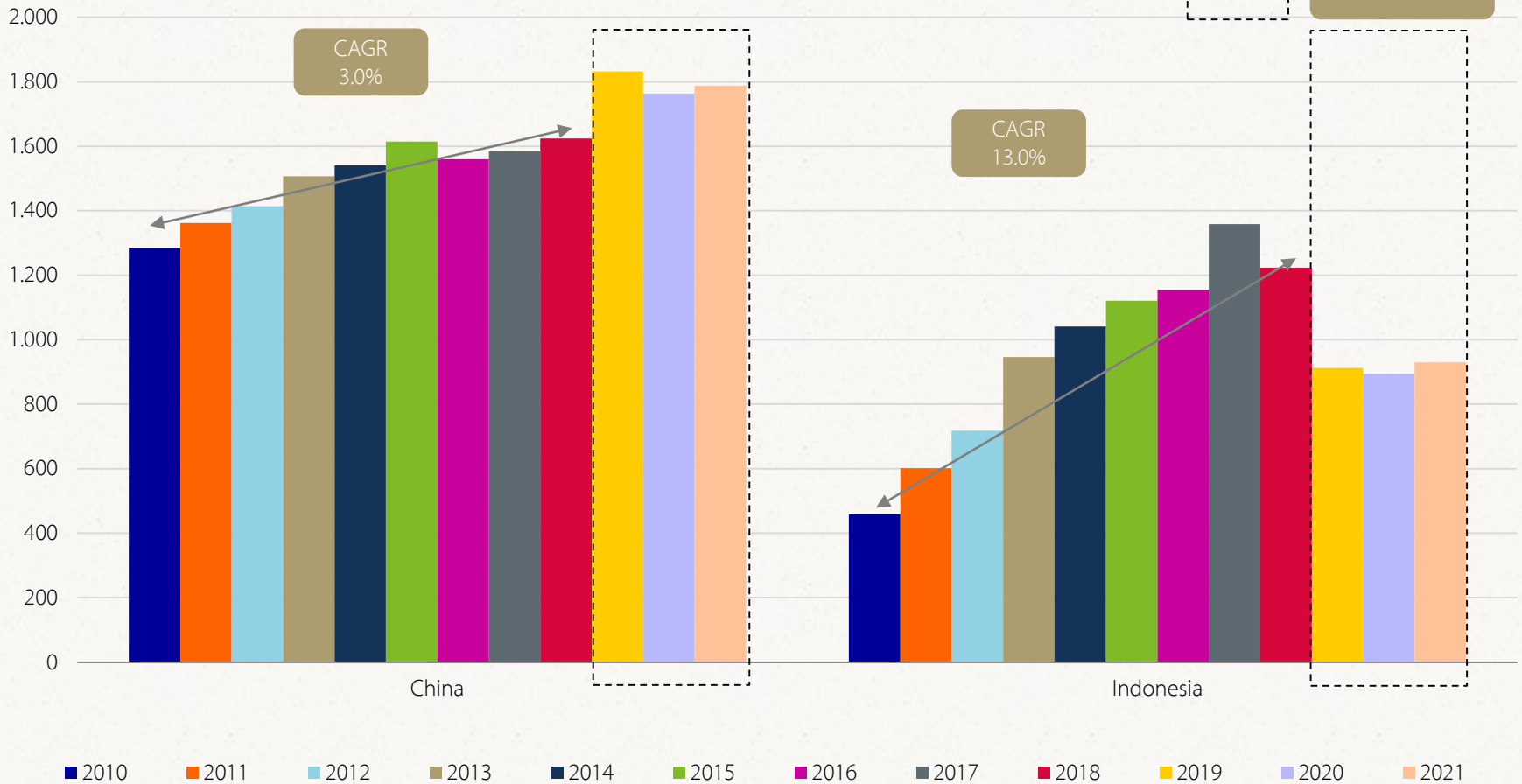
'000 tonnes



# China and Indonesia Tilapia forecast

## Tilapias and other cichlids production FAO

'000 tonnes



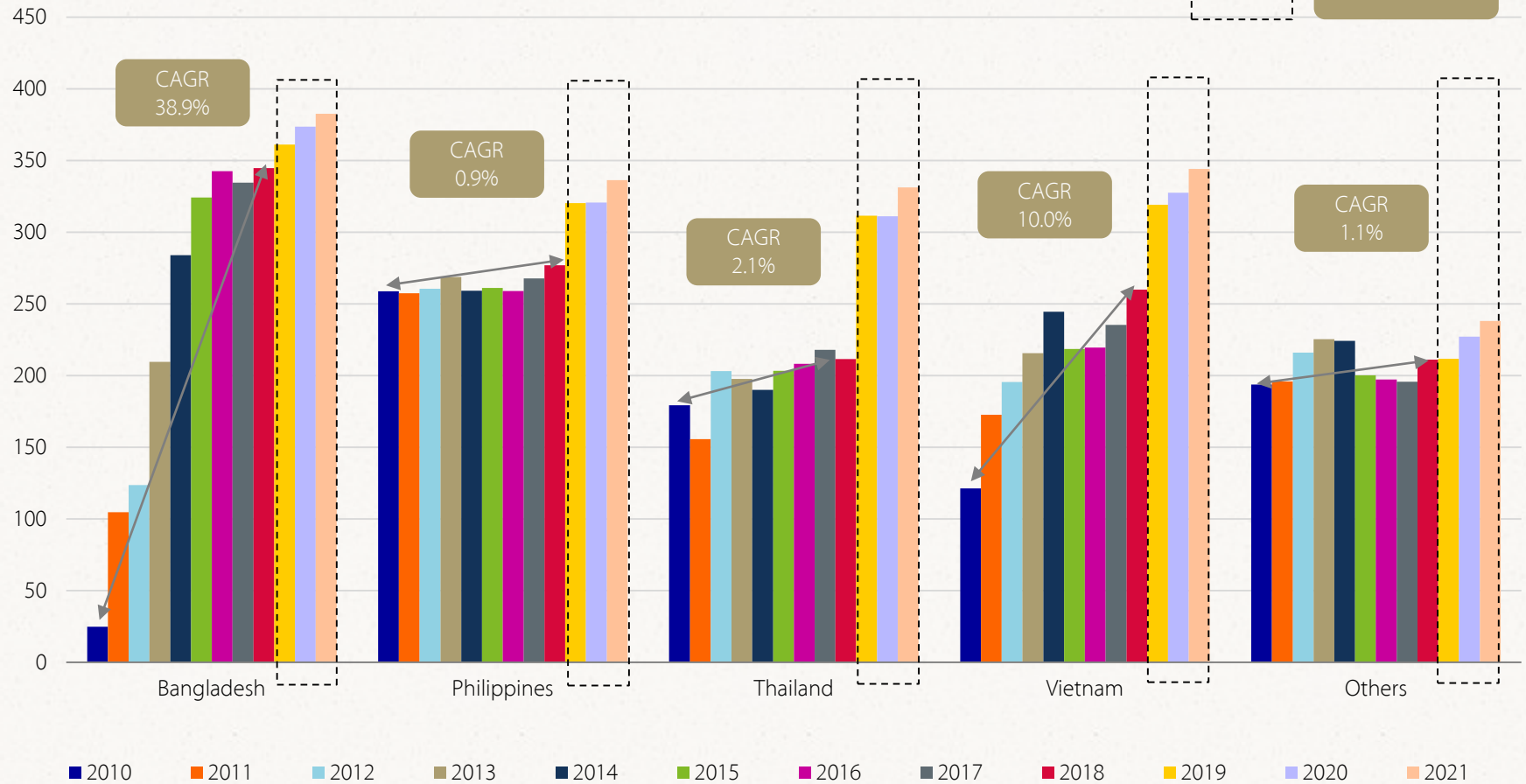
Indonesia FAO data and survey data may not match ?



# Other Asian Tilapia production and forecast

Tilapias and other cichlids production FAO

'000 tonnes



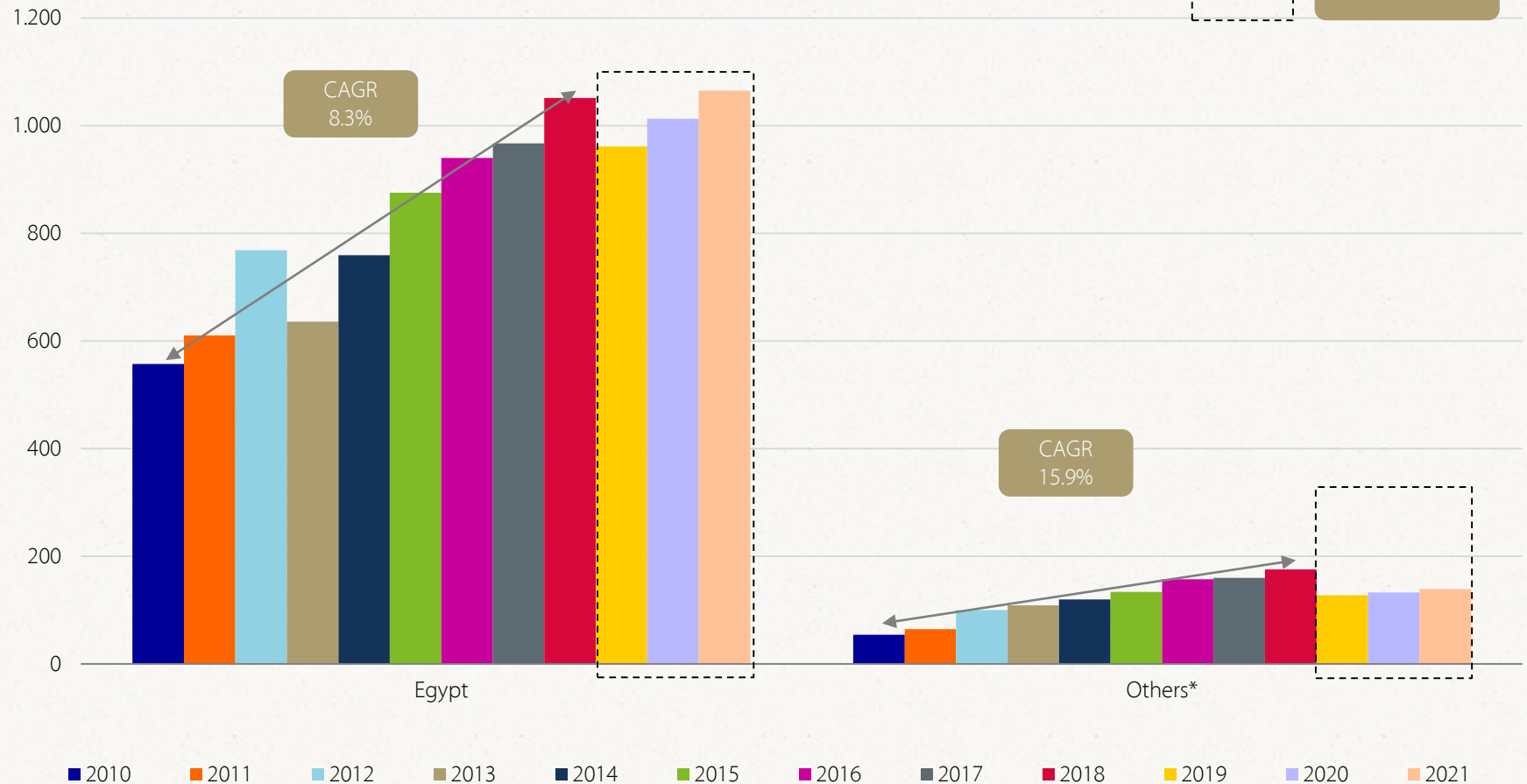
Philippines, Thailand and Vietnam FAO data and survey seem not to match?



# Egypt and rest of Africa Tilapia production forecast

## Tilapias and other cichlids production FAO

'000 tonnes



Source: Rabobank, FAO, GAA GOAL Survey, 2020  
Note\* Others include Ghana, Uganda, Zambia and Zimbabwe

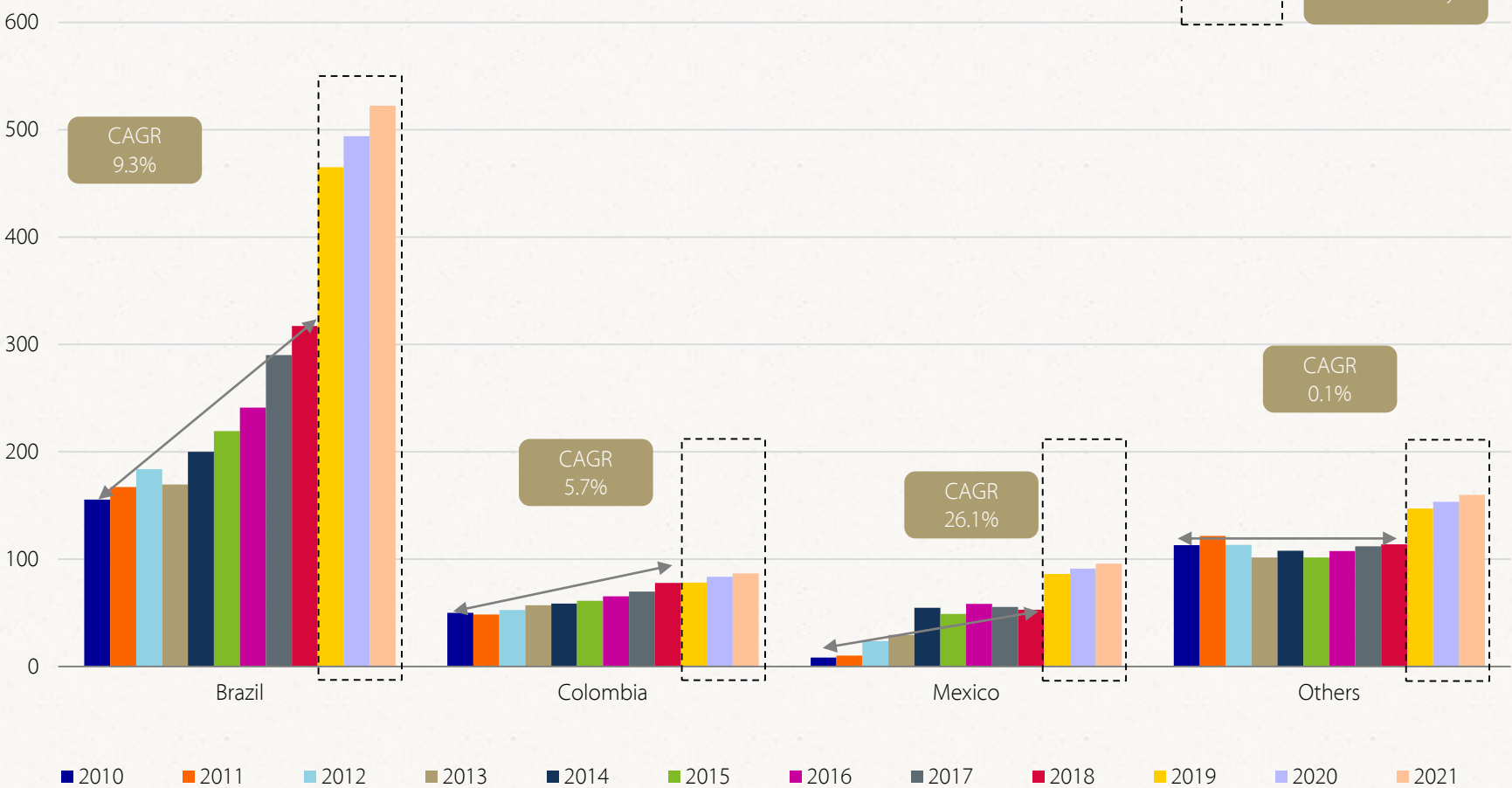


Rabobank

# Latin American Tilapia supply forecast

Tilapias and other cichlids production FAO

'000 tonnes



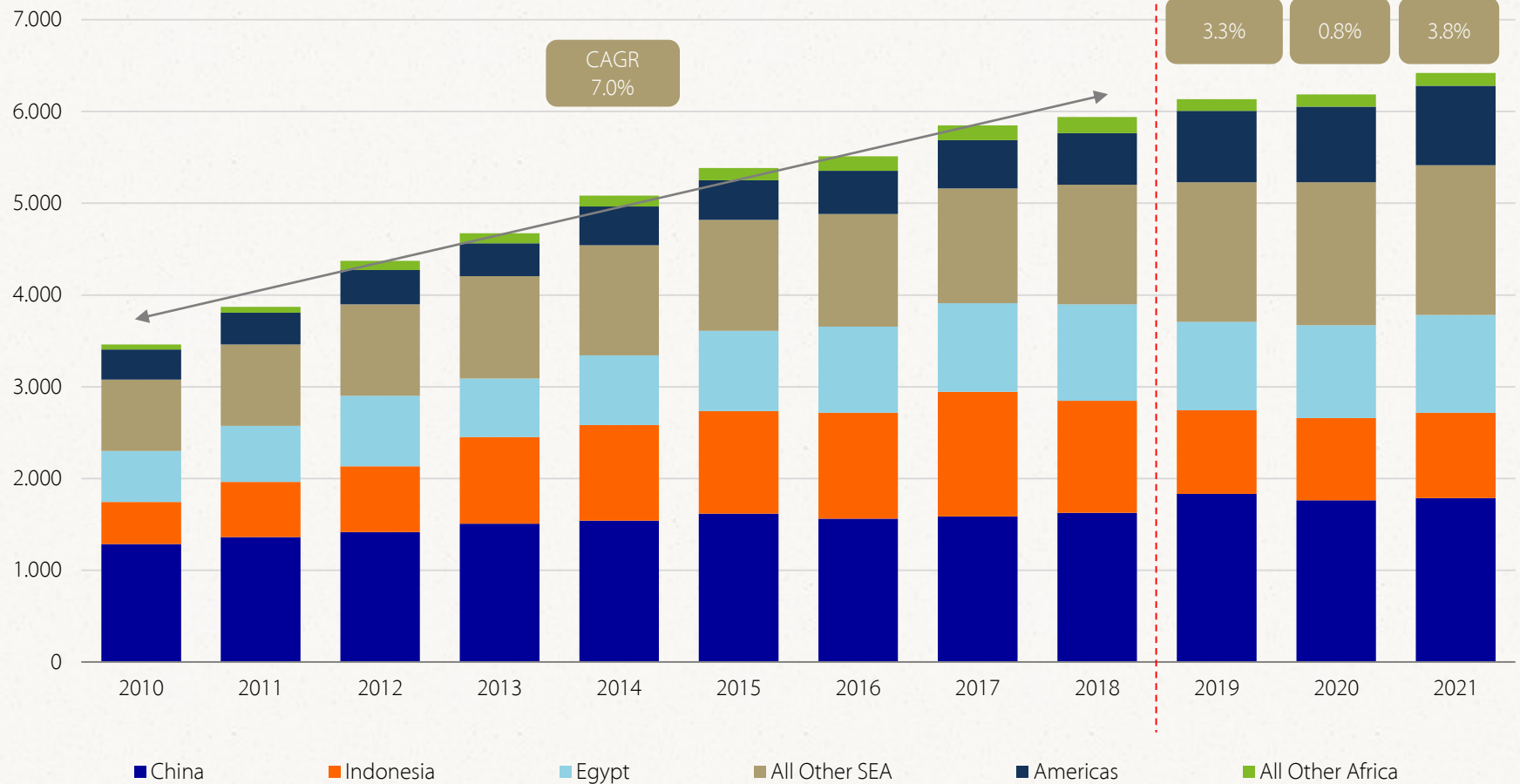
Source: Rabobank, FAO, GAA GOAL Survey, 2020



# Global Tilapia supply and forecast

Tilapias and other cichlids production FAO

'000 tonnes



# IV

## Pangasius (Striped Catfish)

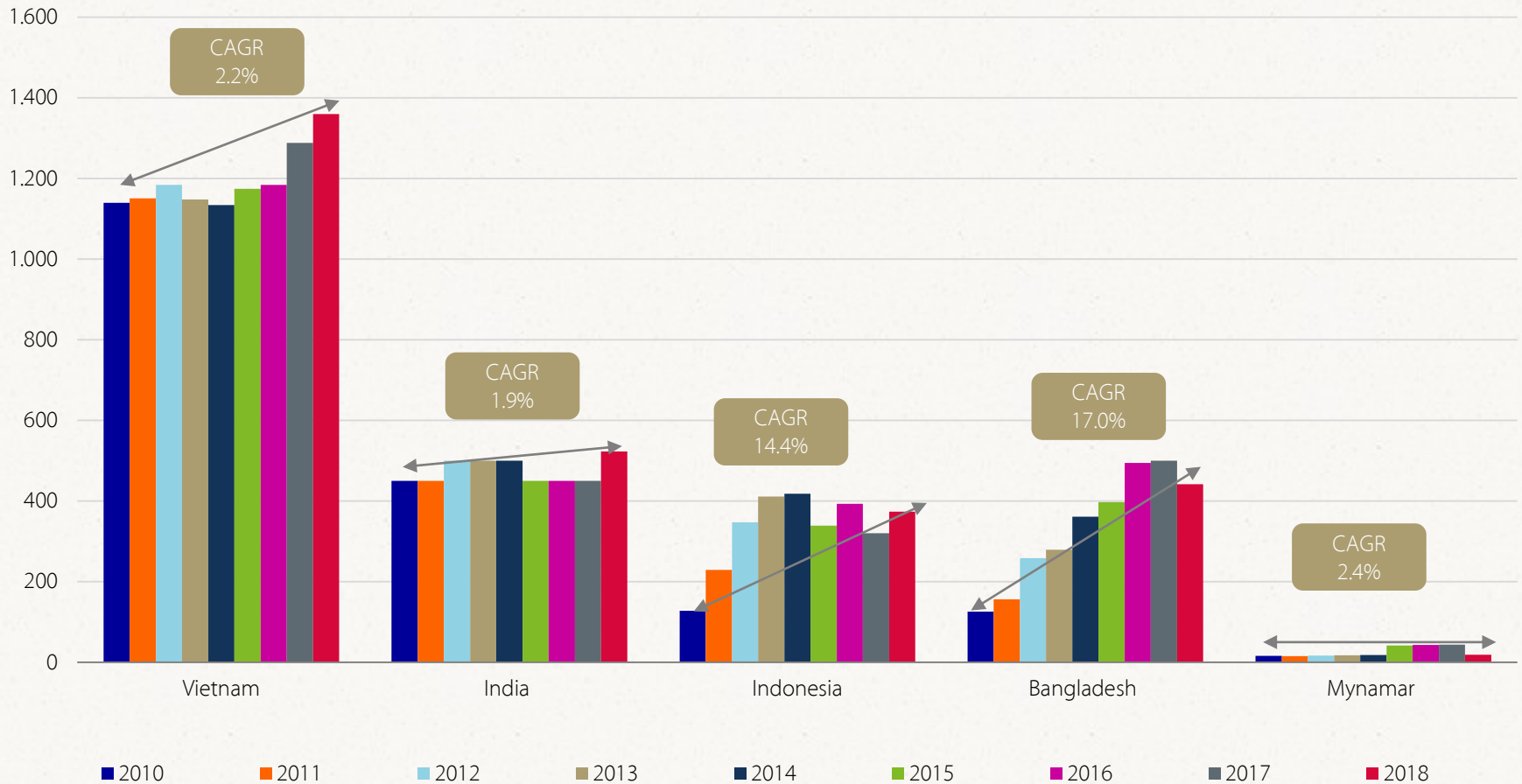


Rabobank

# Pangasius (Striped Catfish) FAO supply, key regions (excluding China)

Pangasius FAO supply

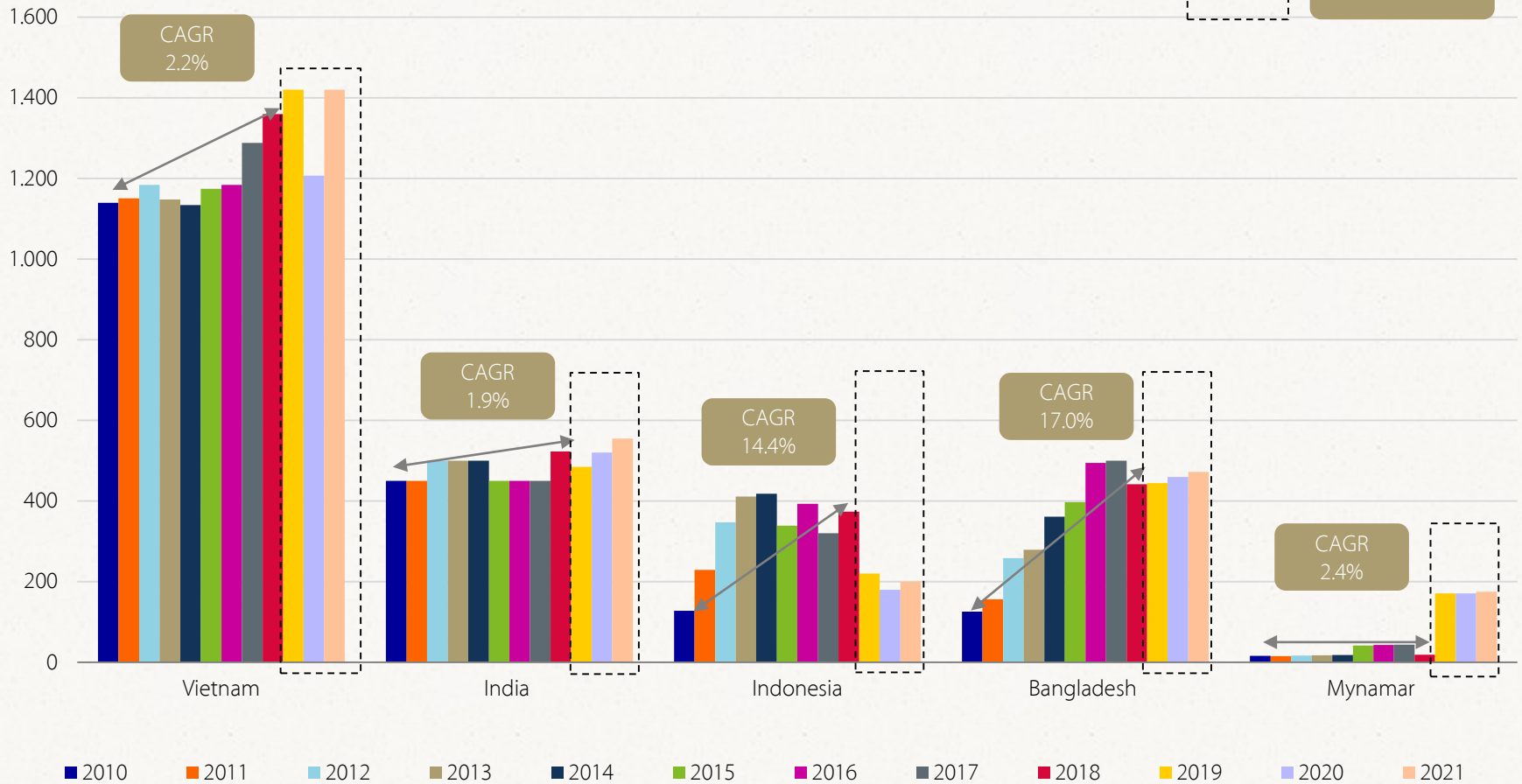
'000 tonnes



# Pangasius (Striped Catfish) forecast

## Pangasius FAO supply

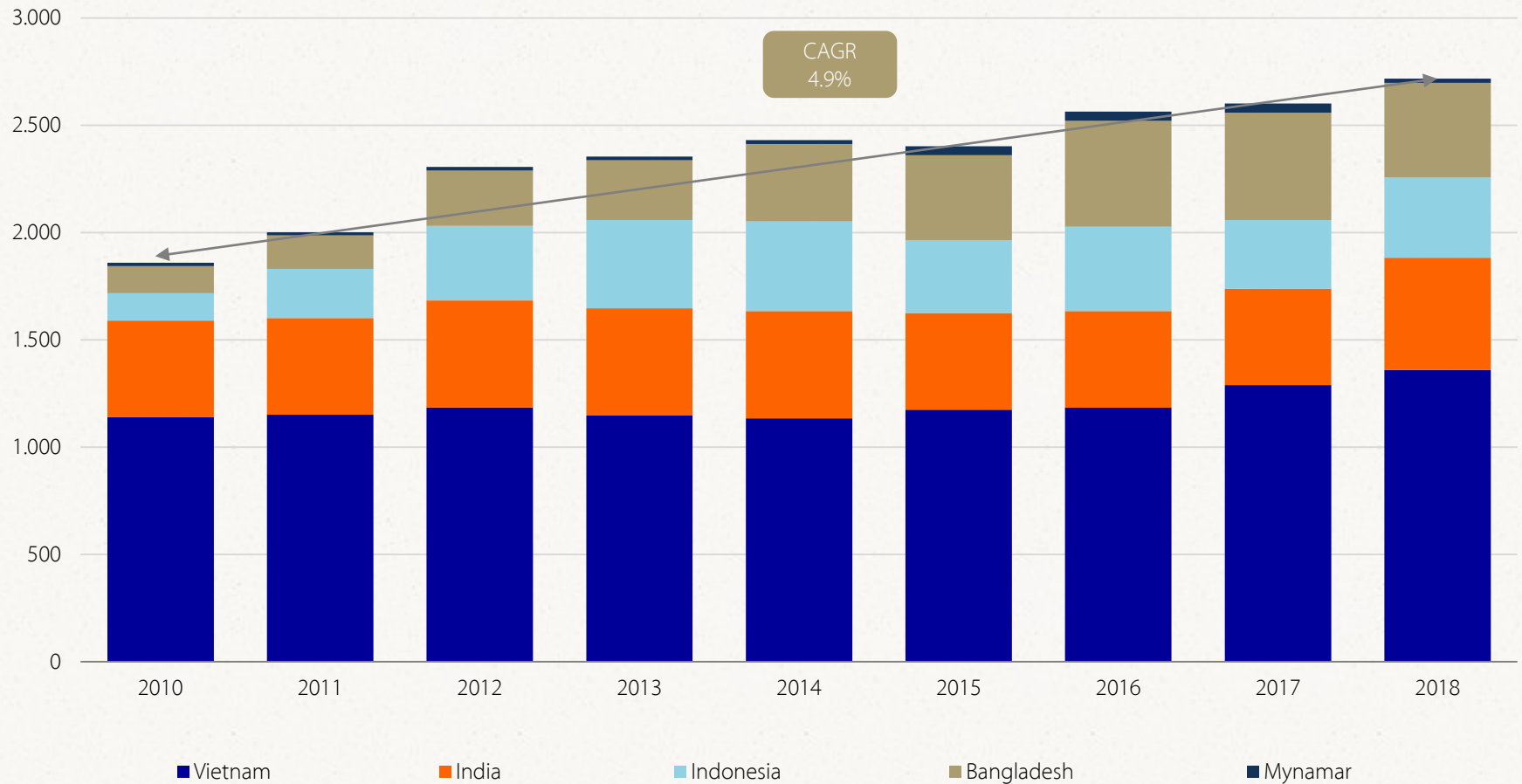
'000 tonnes



# Total Pangasius production FAO (excluding China)

## Total Pangasius production FAO

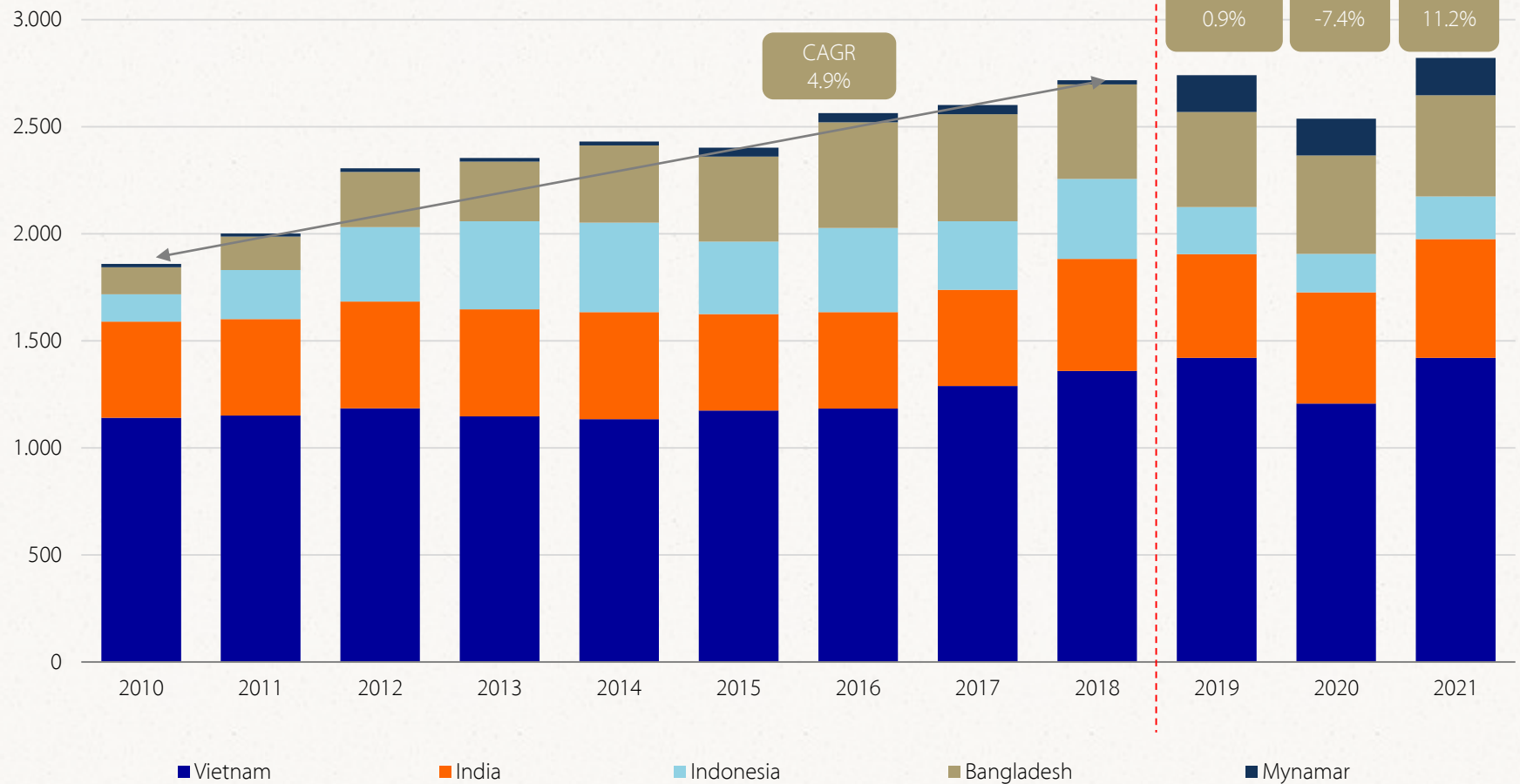
'000 tonnes



# Total Pangasius production forecast

Total Pangasius production FAO

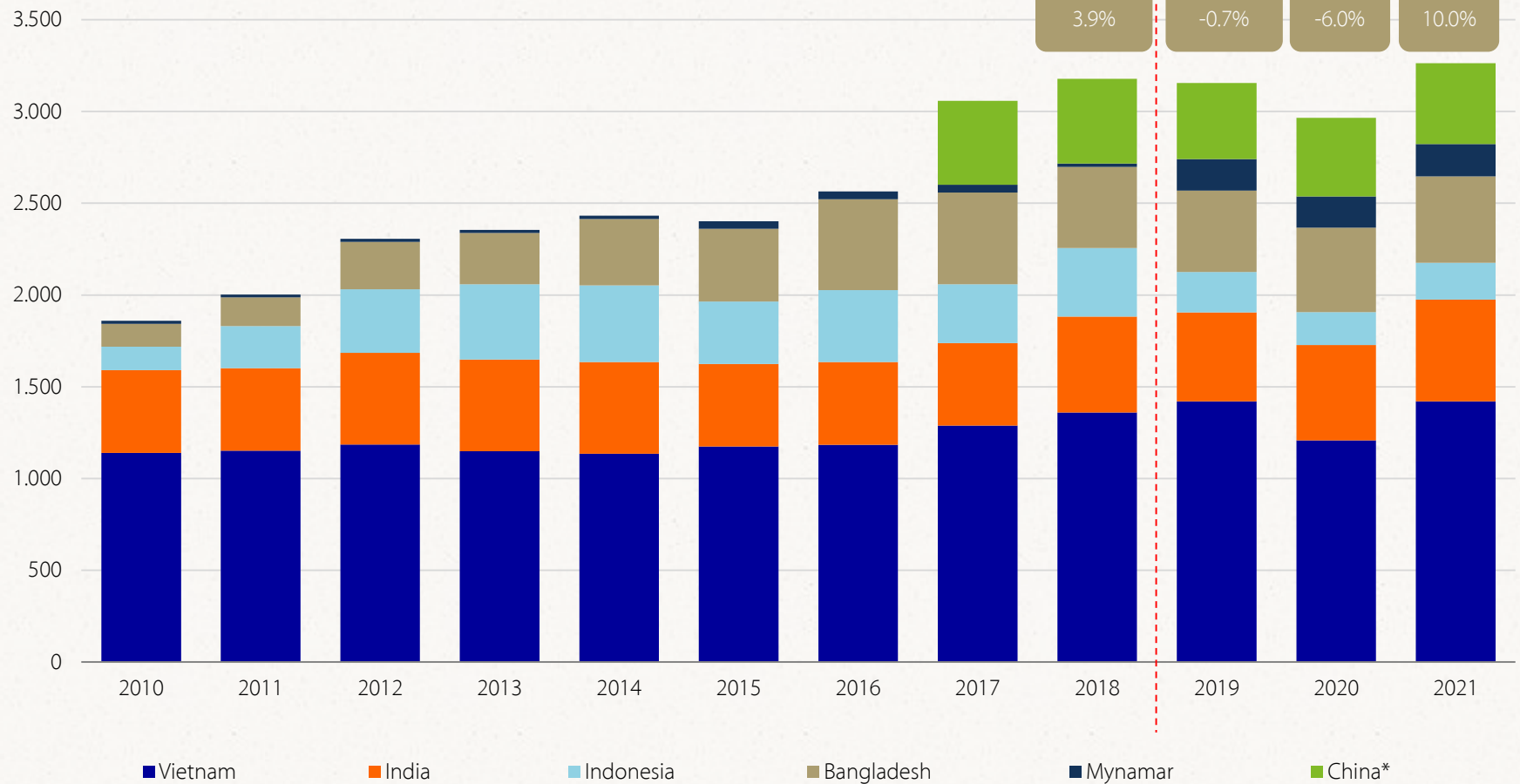
'000 tonnes



# Total Pangasius production and forecast with China included

Total Pangasius production FAO

'000 tonnes



Source: Rabobank, FAO, GAA GOAL Survey, 2020  
Note\* China data is taken from GOAL Survey 2019



Rabobank



Carps

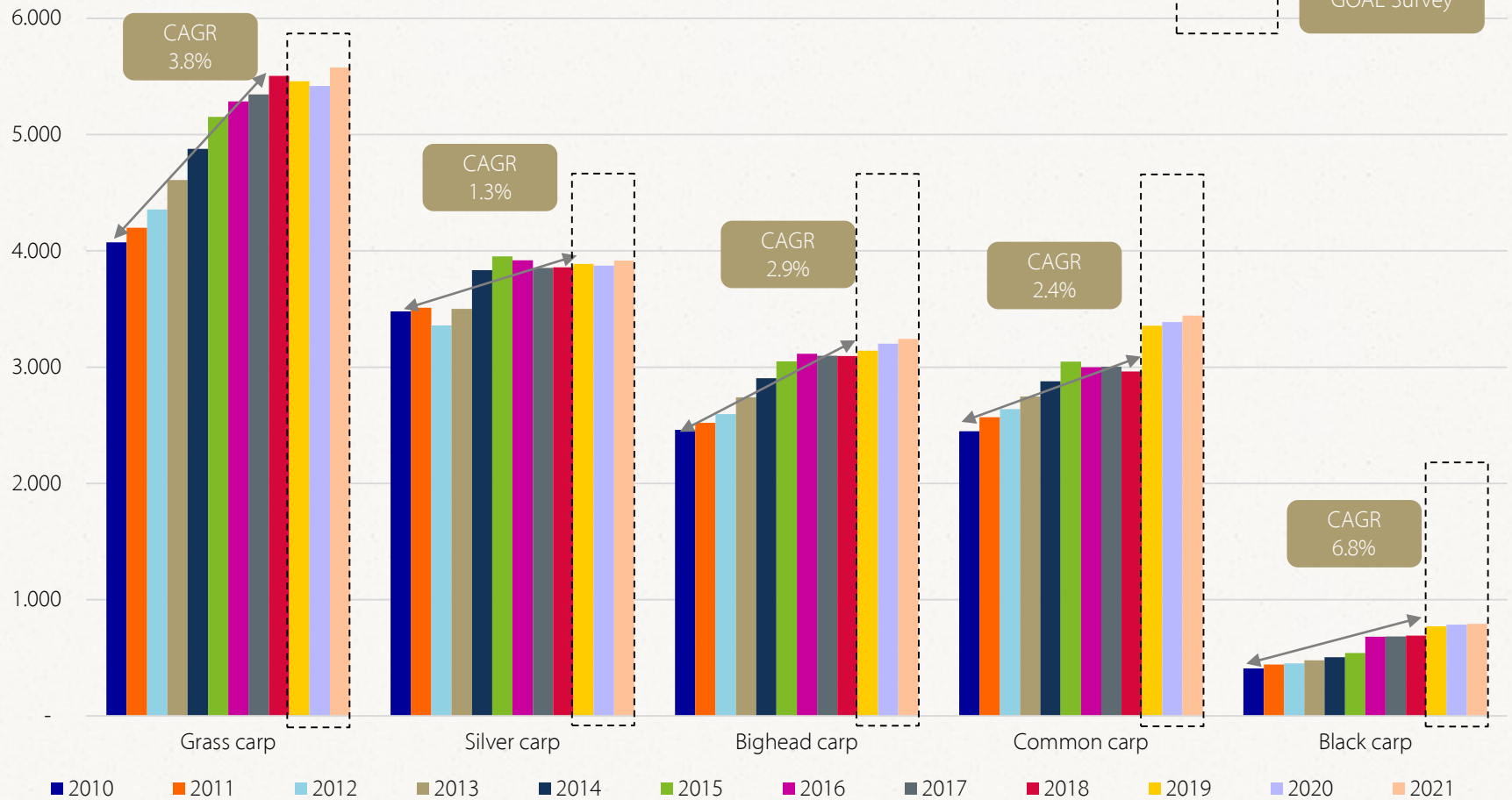


Rabobank

# China Carps production and forecast

## China Carps production FAO

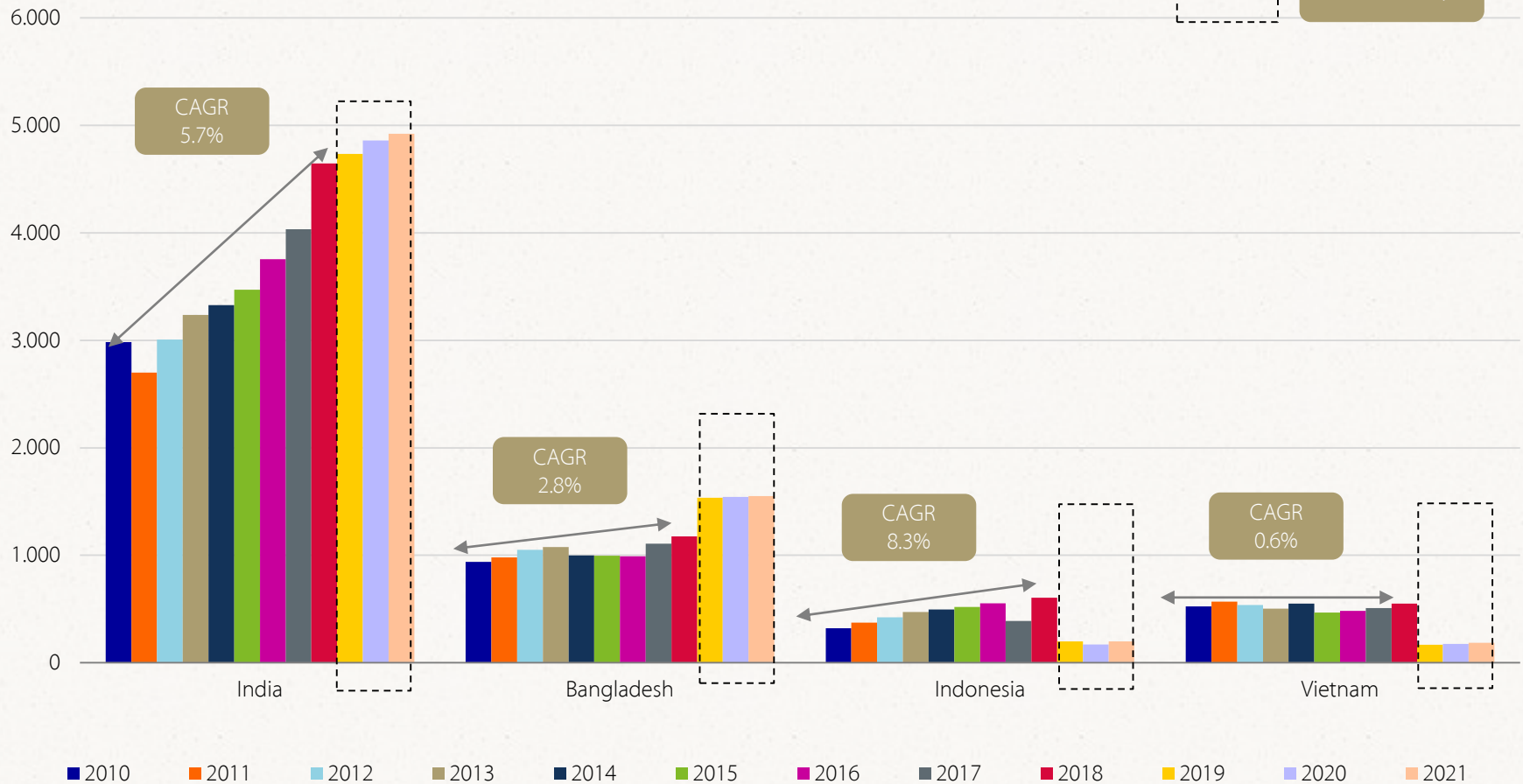
'000 tonnes



# Other Carps production forecast

Carps, barbels and other cyprinids production FAO

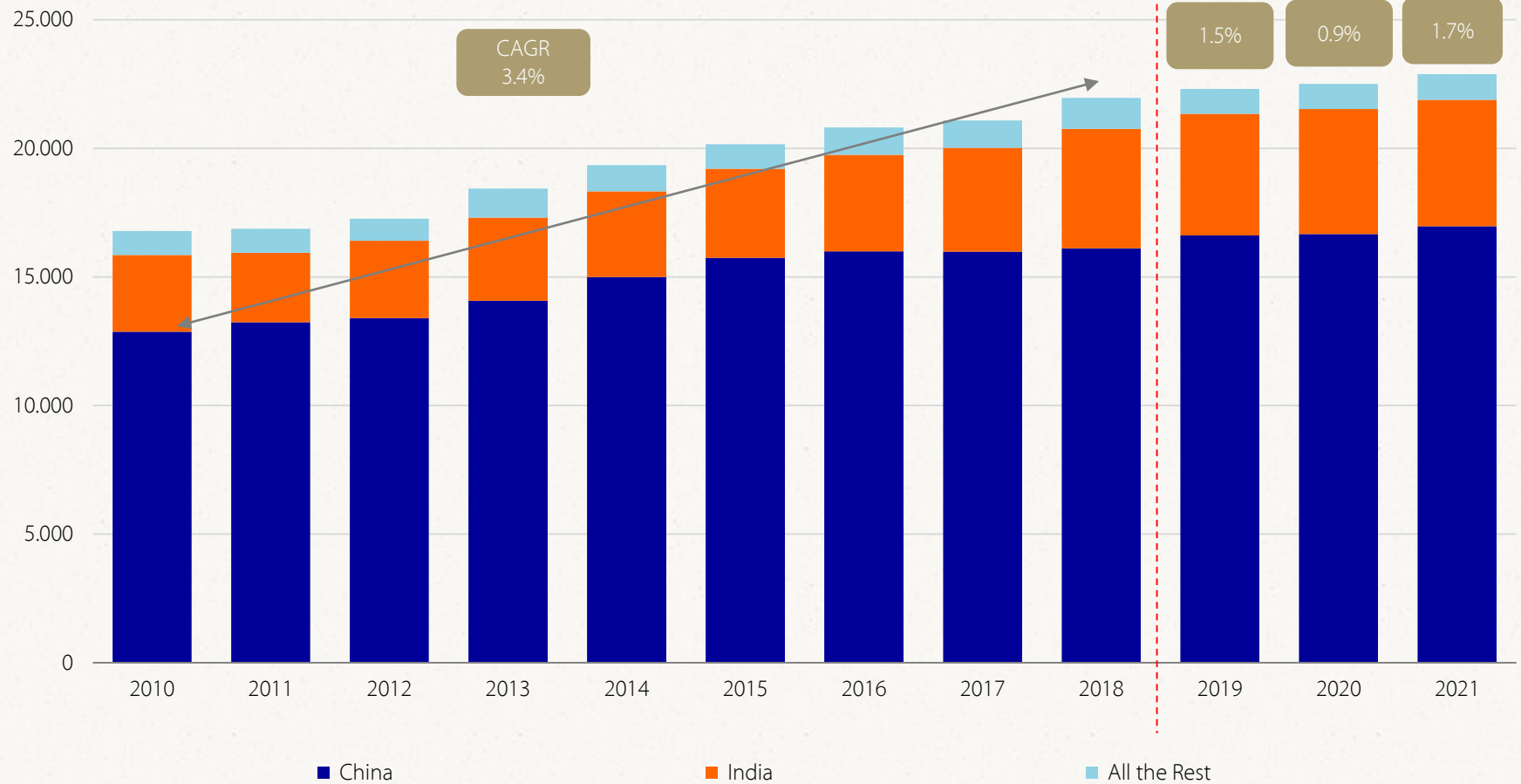
'000 tonnes



# Carps supply FAO and forecast

## Carps production FAO

'000 tonnes

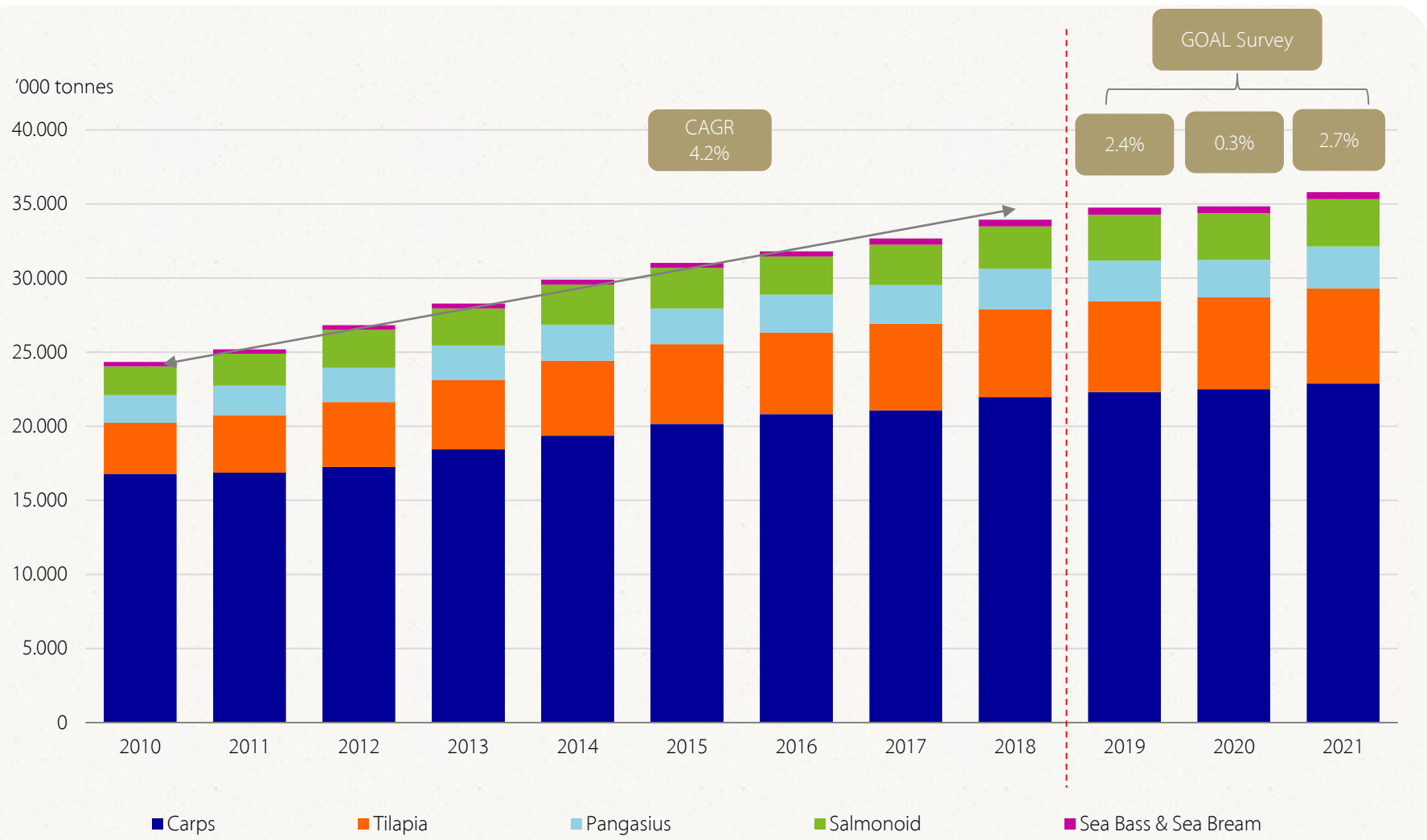


Source: Rabobank, FAO, GAA GOAL Survey, 2020  
All the Rest\* Bangladesh, Indonesia, Vietnam



Rabobank

# All fin-fish in survey total



Source: Rabobank, FAO, GAA GOAL Survey, 2020



Rabobank

# Closing remarks:



## ***1. Salmon and western aquaculture***

- Export focused, mature industry with some limitations to growth and now slowing down further due to Covid impacting food service demand
- Corporate industry, high capital availability and technologically developed. RAS and offshore can boost growth but also be deployed for other species



## ***2. Carps***

- Enormous in volume but a relatively low value artisanal product with only local consumption in few countries (mainly China & India)
- Growth depends on China and showing signs of slowing down, although growth is still strong in India



## ***3. All the rest: A diverse world from Tilapia to Cobia to Pangasid and Pompano***

- Booming industry globally with many aquaculture hubs developing for both local markets and export
- Showing growth even in the current environment. More accurate information is needed to fully capture the plethora of dynamics

