

*Global Aquaculture
Production Survey and
Forecast*

*October, 2020
Gorjan Nikolic
RaboResearch*

*Shrimp: presented by the
Global Aquaculture Alliance
and Rabobank*



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Acknowledgements:

Many thanks to:

- All the survey respondents
- Darryl Jory from GAA
- Robins McIntosh from CP Foods



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Americas

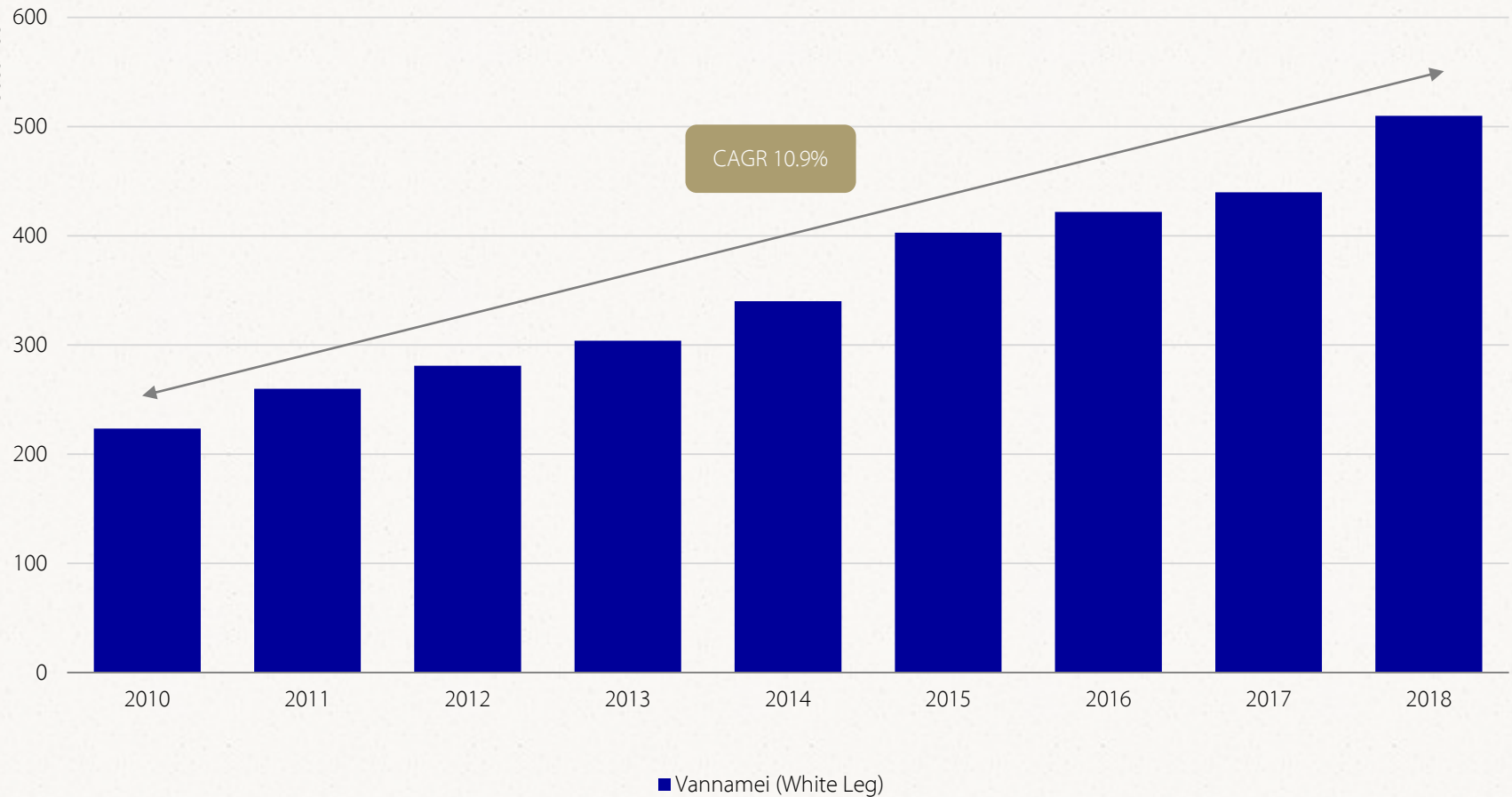


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Ecuador Vannamei Shrimp production FAO

Ecuador Aquaculture Vannamei (White Leg) Shrimp FAO

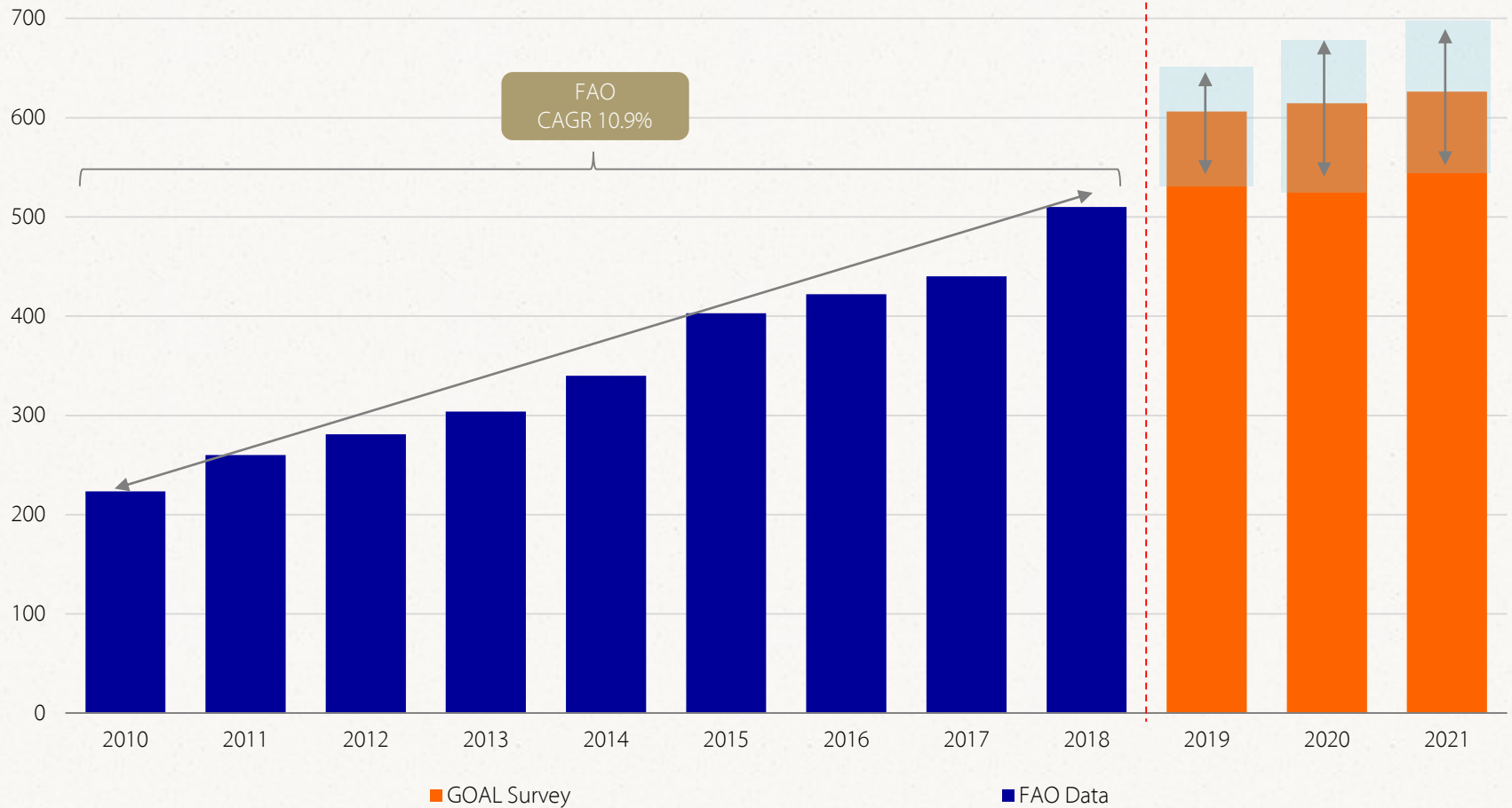
'000 tonnes



Ecuador Vannamei Shrimp production forecast

Ecuador Aquaculture Vannamei (White Leg) Shrimp FAO

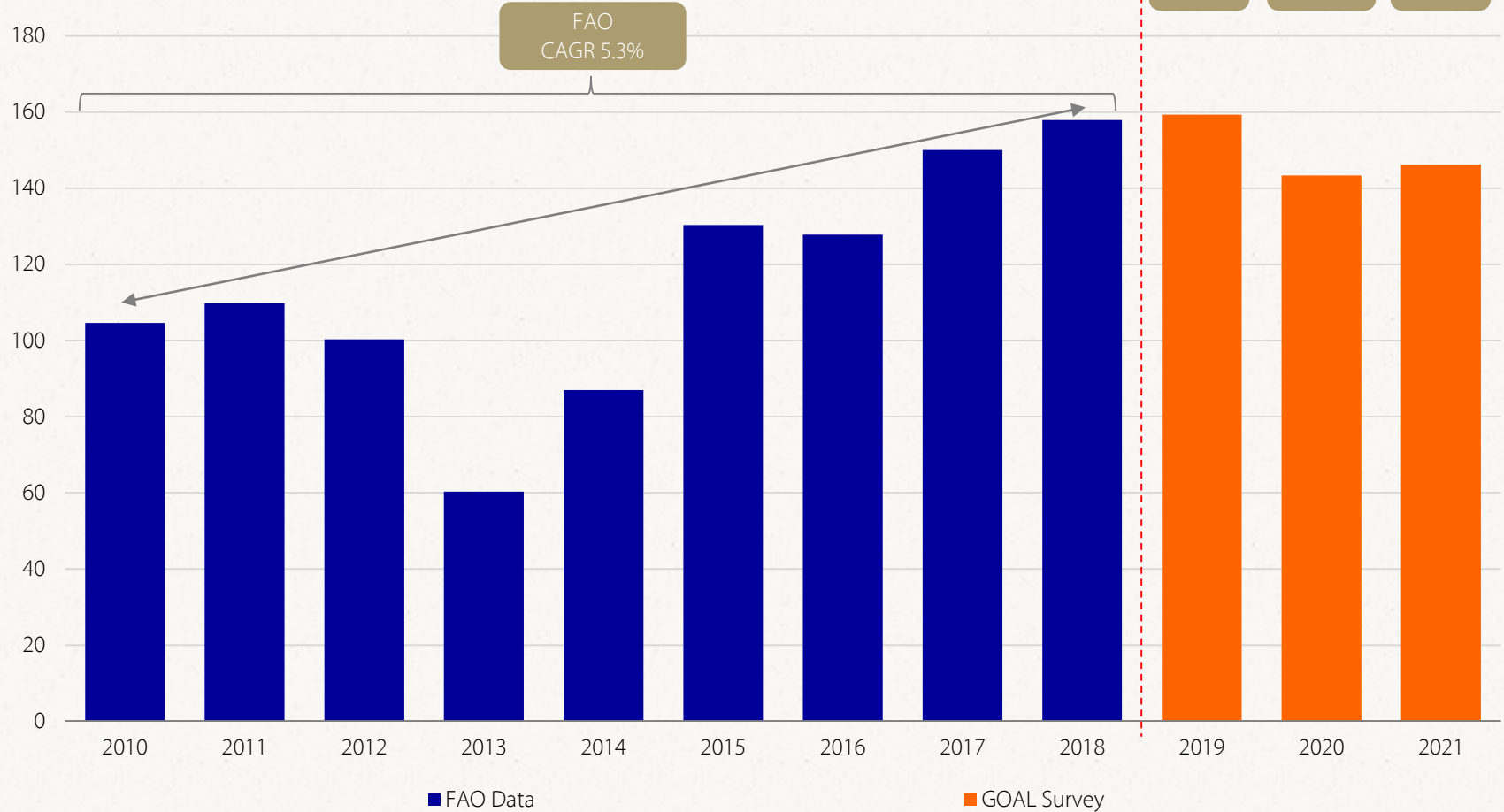
'000 tonnes



Mexico Vannamei Shrimp production forecast

Mexico Aquaculture Vannamei (White Leg) Shrimp FAO

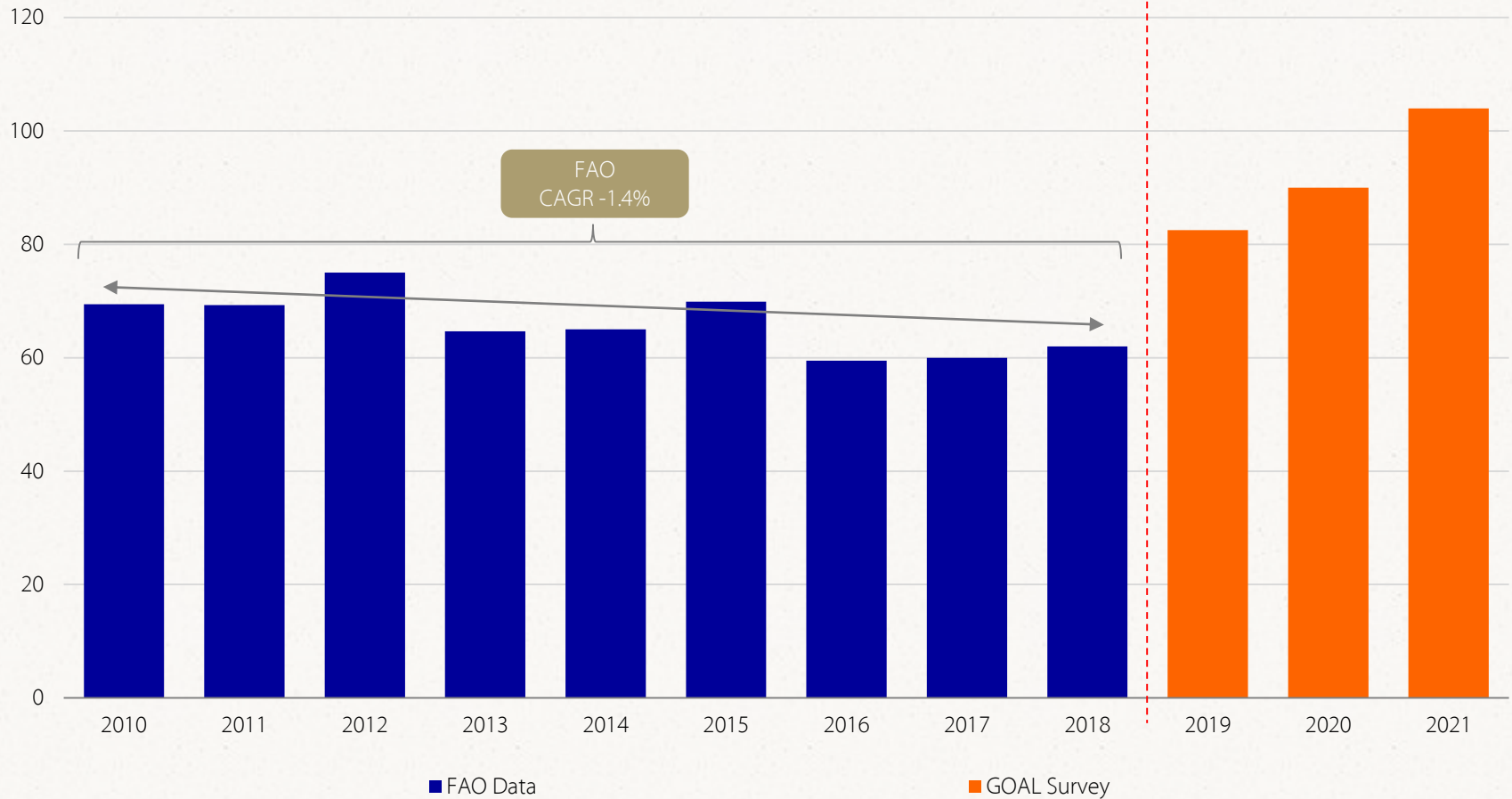
'000 tonnes



Brazil Vannamei Shrimp production forecast

Brazil Aquaculture Vannamei (White Leg) Shrimp FAO

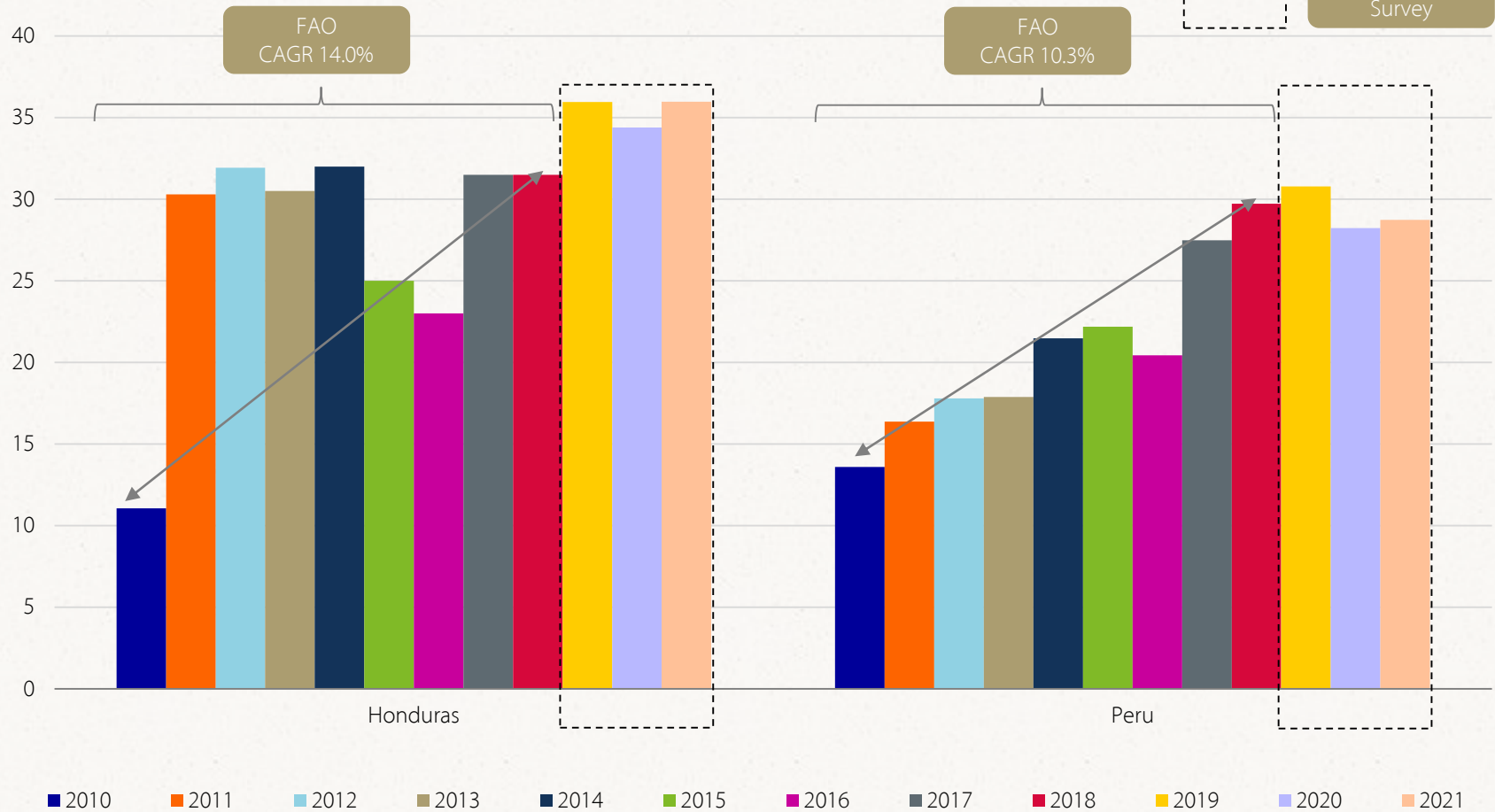
'000 tonnes



Honduras and Peru Vannamei Shrimp production forecast

Honduras and Peru Aquaculture Vannamei (White Leg) Shrimp FAO

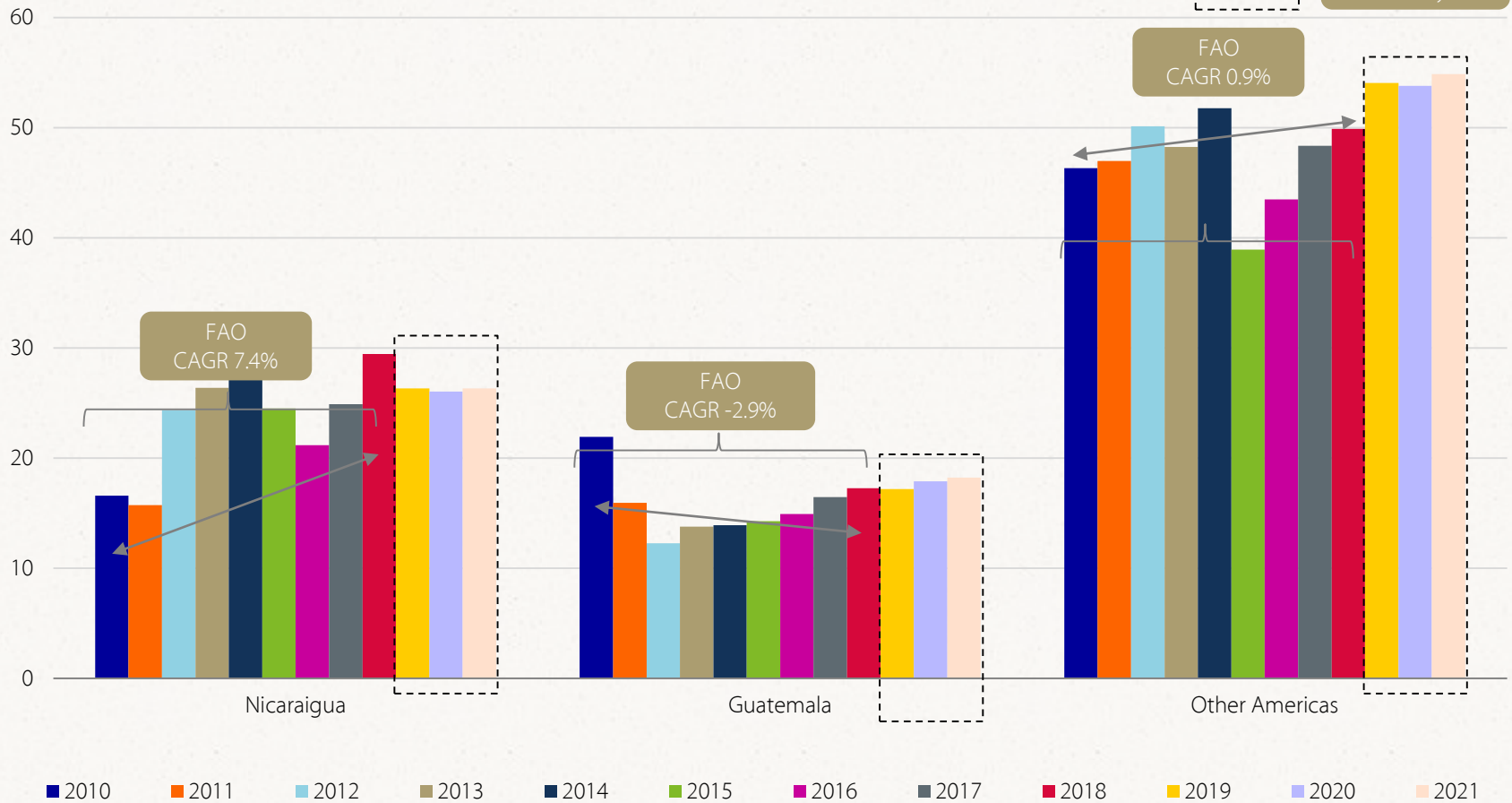
'000 tonnes



Rest of Americas Vannamei Shrimp production forecast

Rest of Americas Aquaculture Vannamei (White Leg) Shrimp FAO

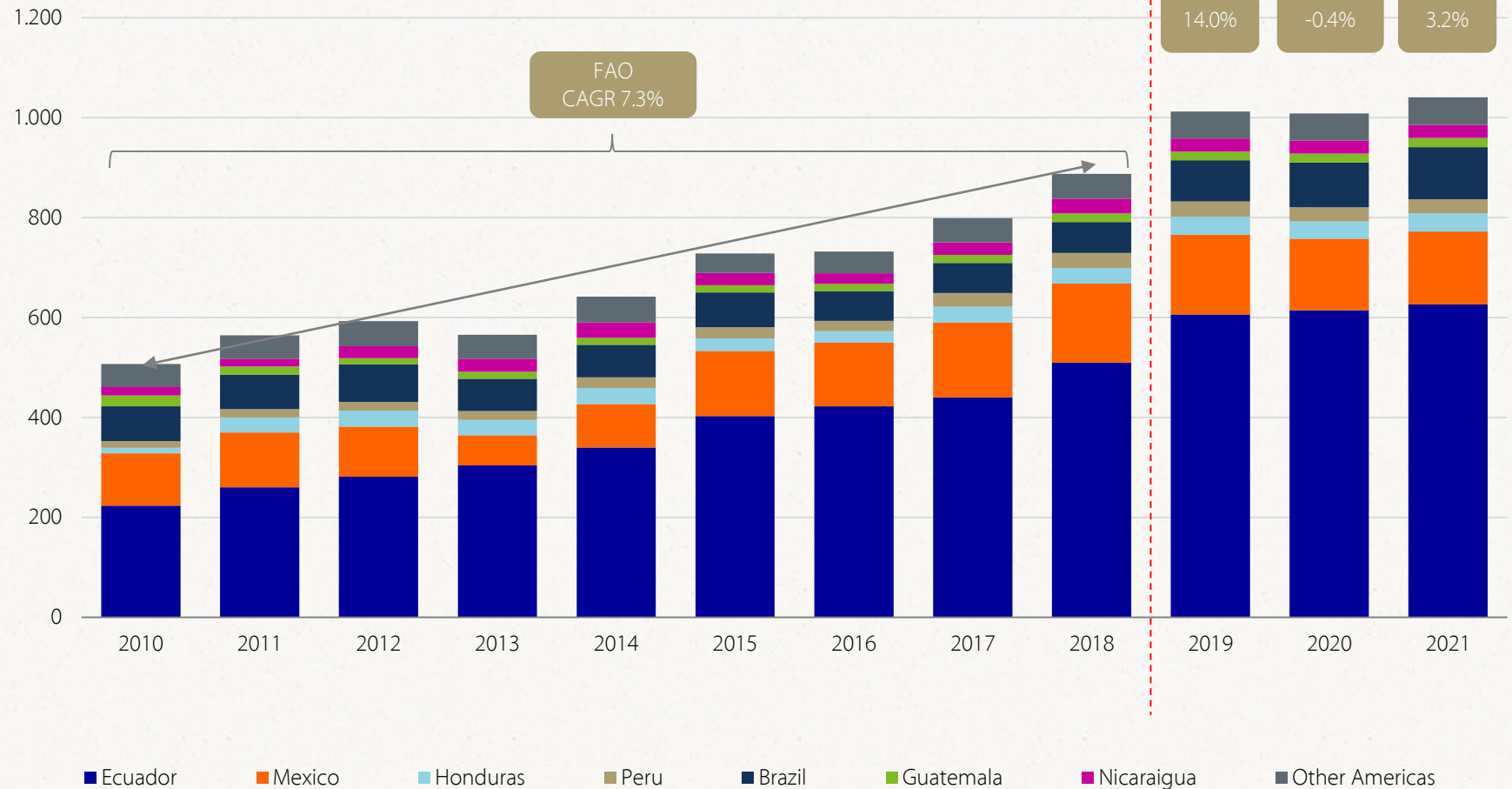
'000 tonnes



Americas Vannamei Shrimp production forecast

Americas Aquaculture Vannamei (White Leg) Shrimp FAO

'000 tonnes



2

India and China

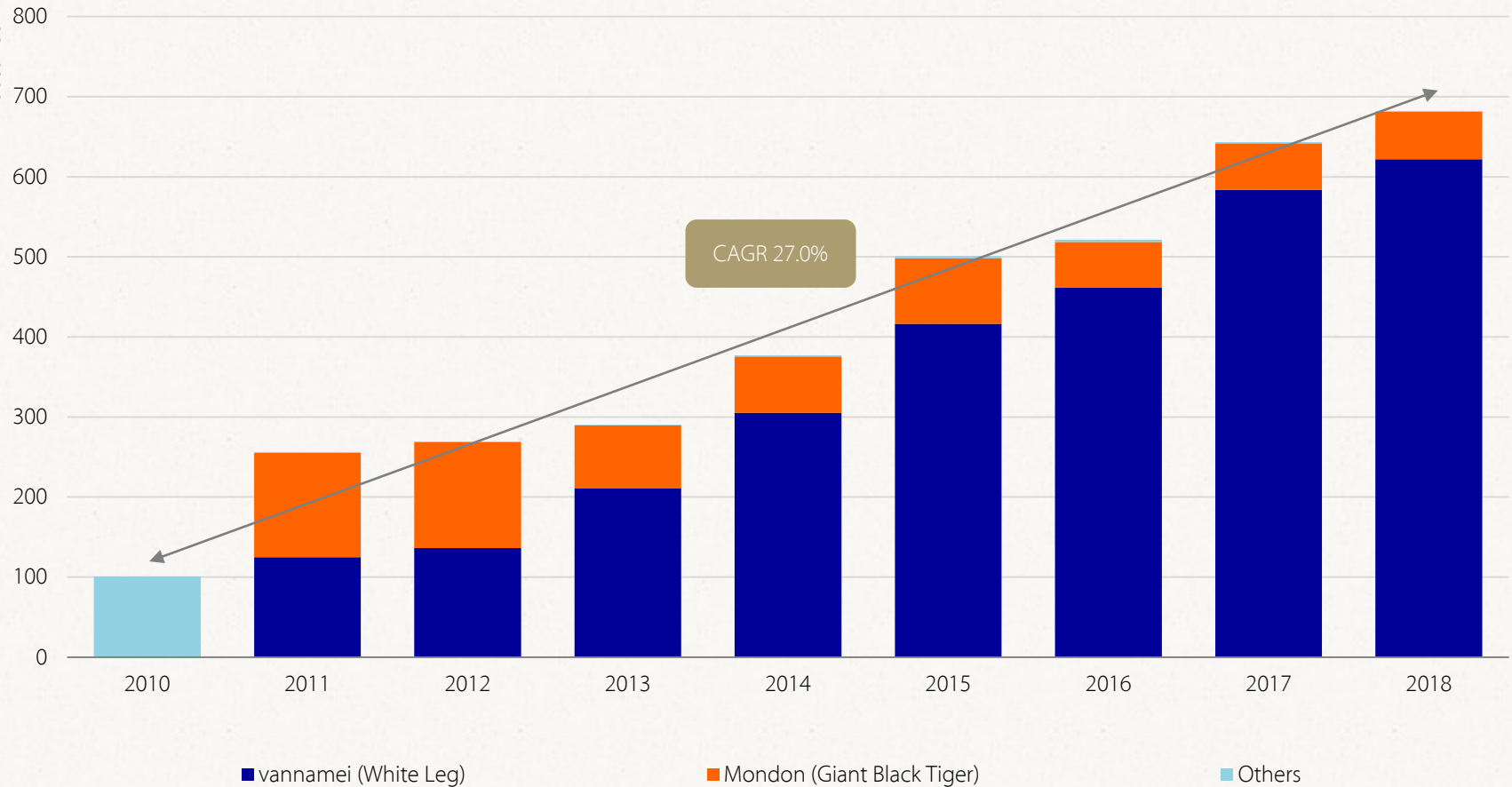


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India Shrimp production FAO

India Aquaculture Shrimp FAO

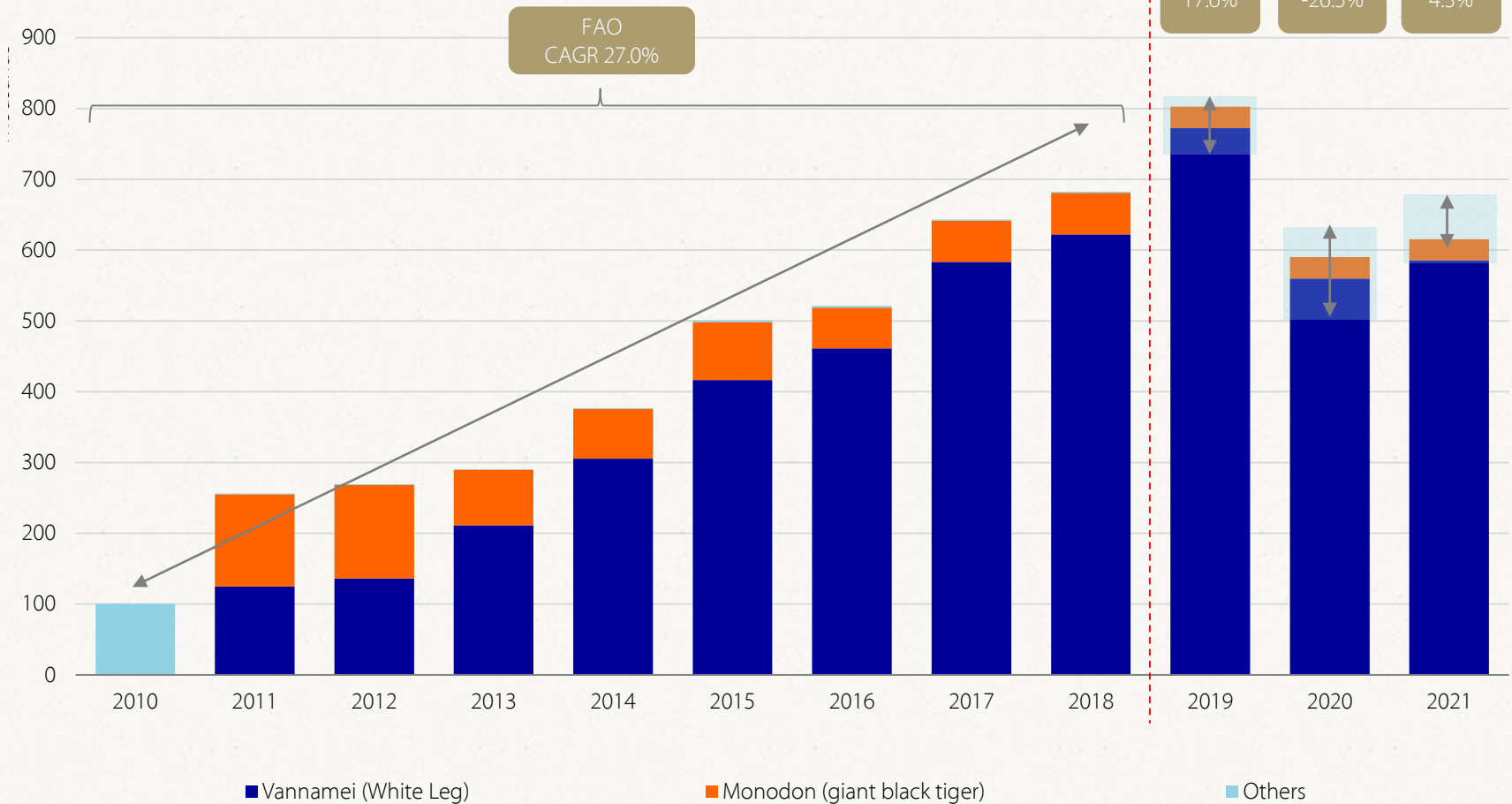
'000 tonnes



India Shrimp production forecast

India Aquaculture Shrimp FAO

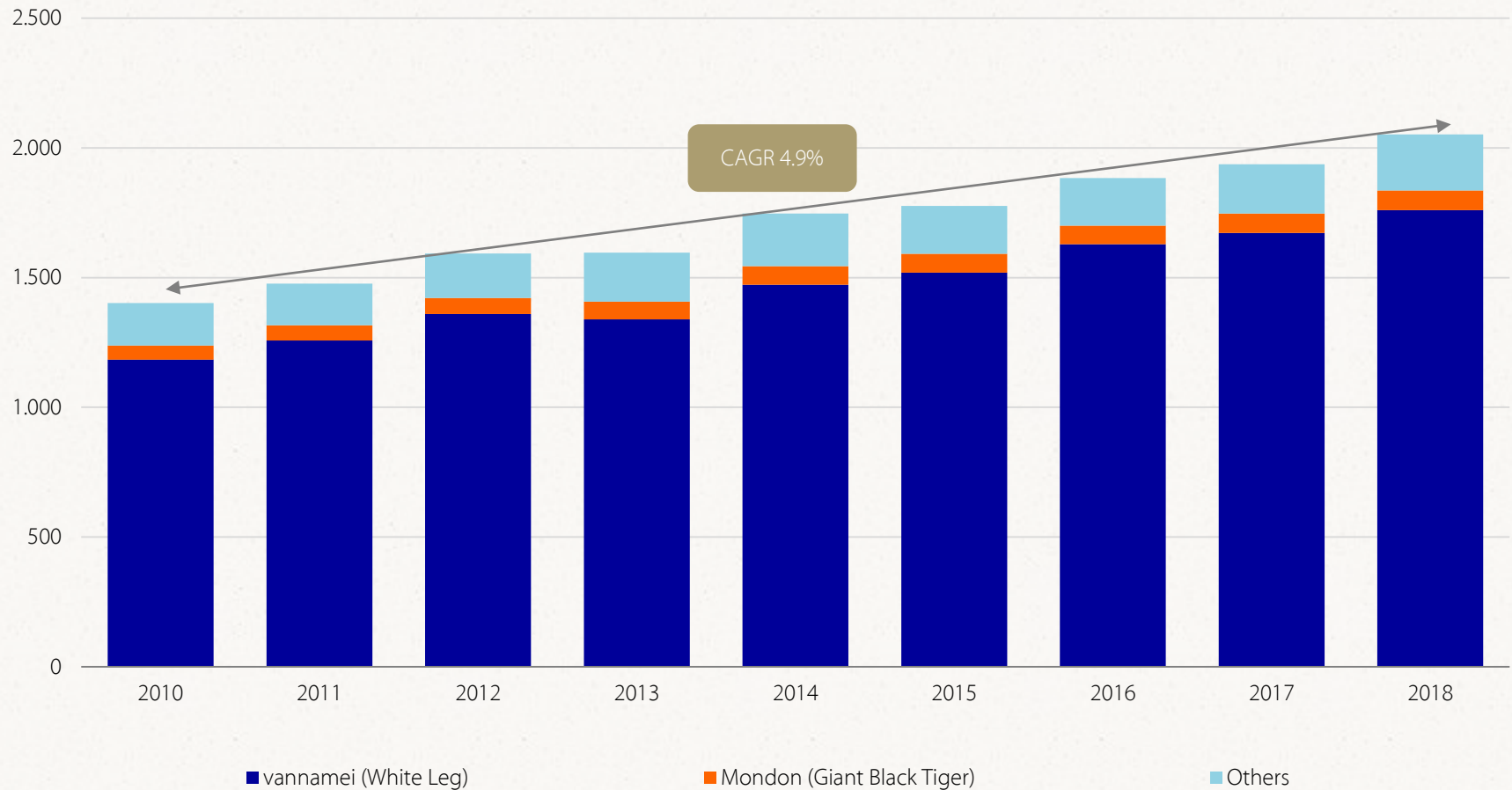
'000 tonnes



China Shrimp production - FAO

China Aquaculture Shrimp FAO

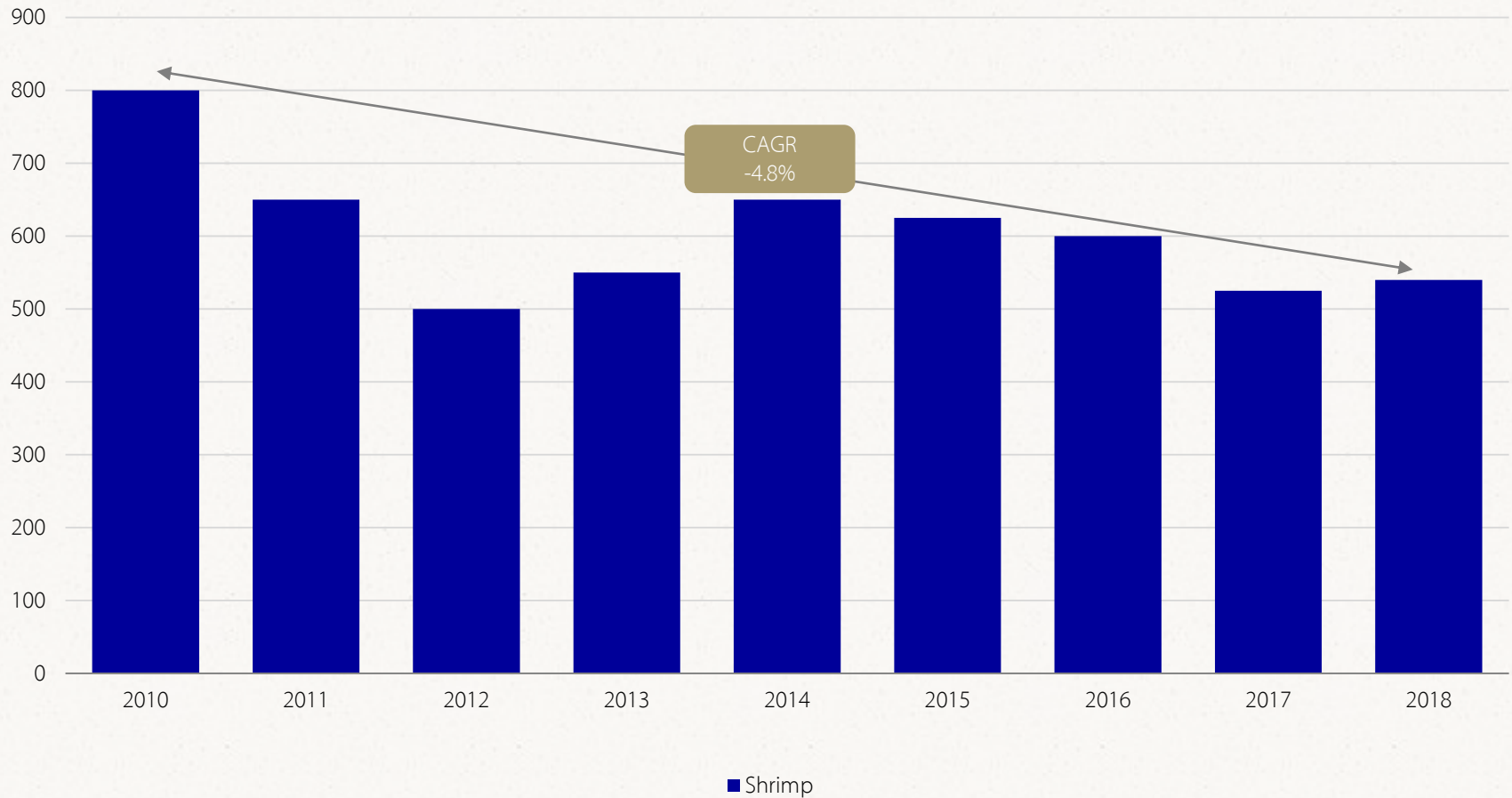
'000 tonnes



China Shrimp production – Estimated production

China Aquaculture Shrimp - Estimated

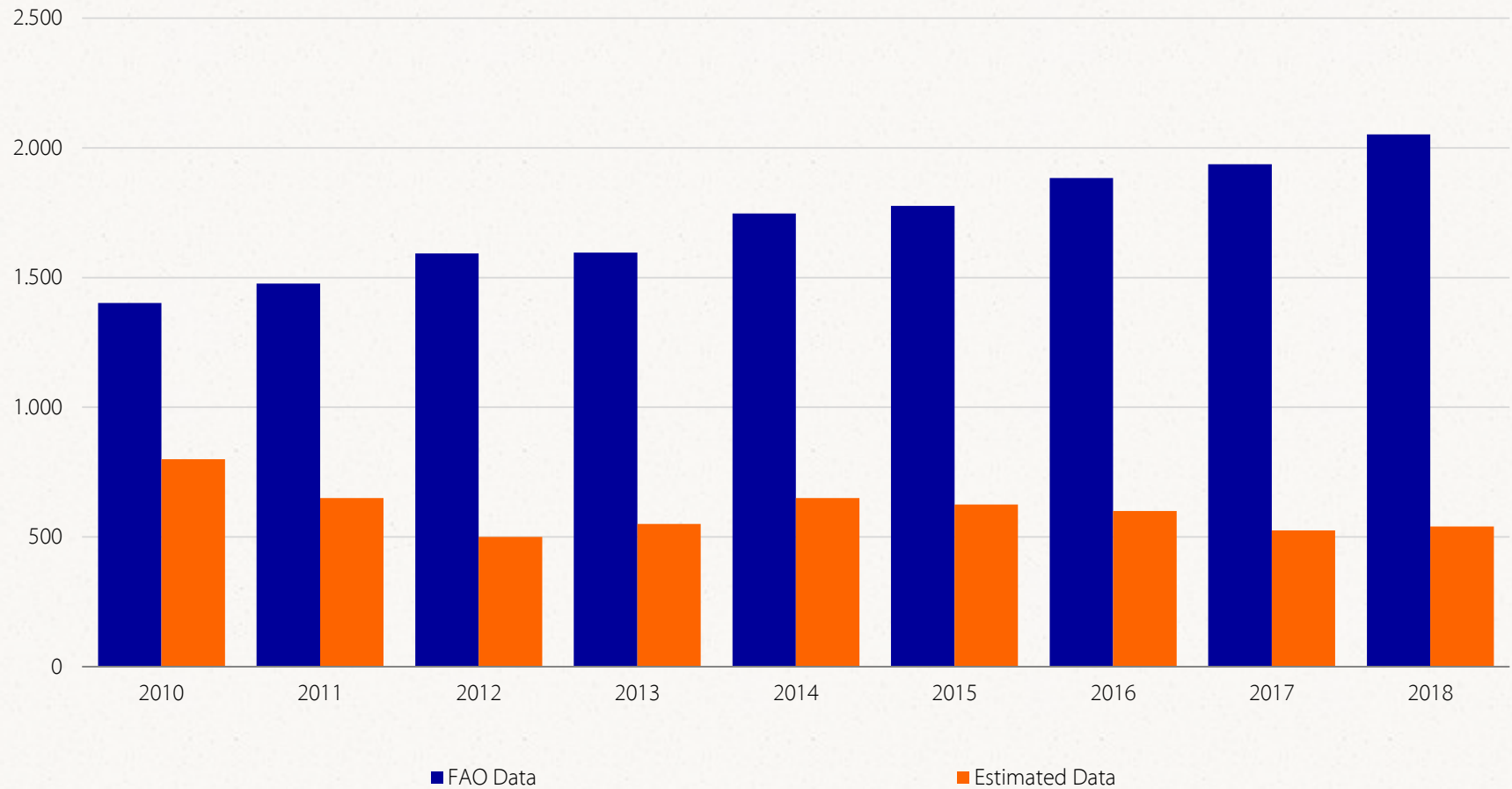
'000 tonnes



China Shrimp production – FAO vs. Estimated production

China Aquaculture Shrimp FAO

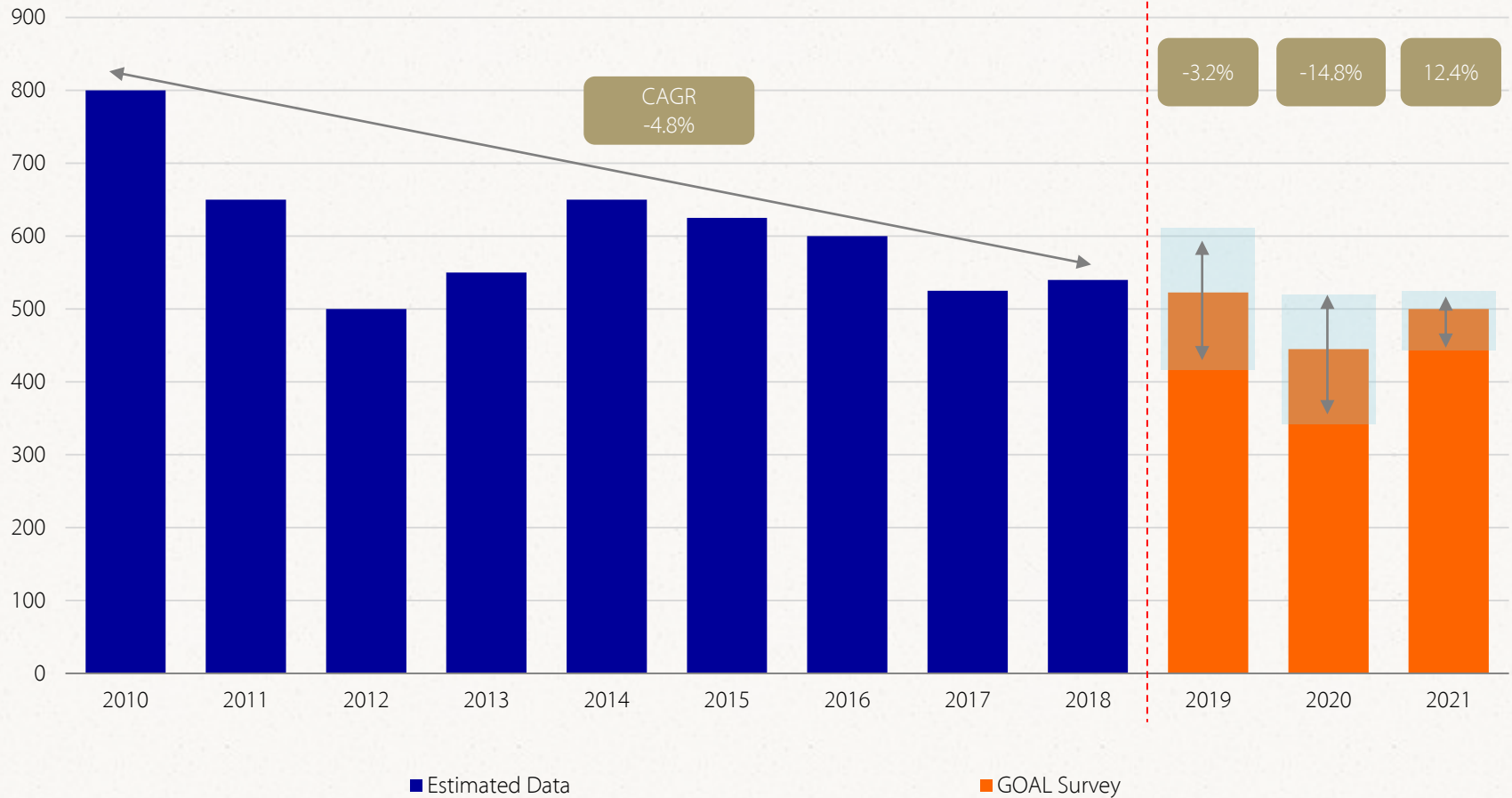
'000 tonnes



China Shrimp production forecast

China Aquaculture Shrimp FAO

'000 tonnes



Source: Rabobank, GAA Survey, Robins McIntosh / CP Foods 2020



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SE Asia

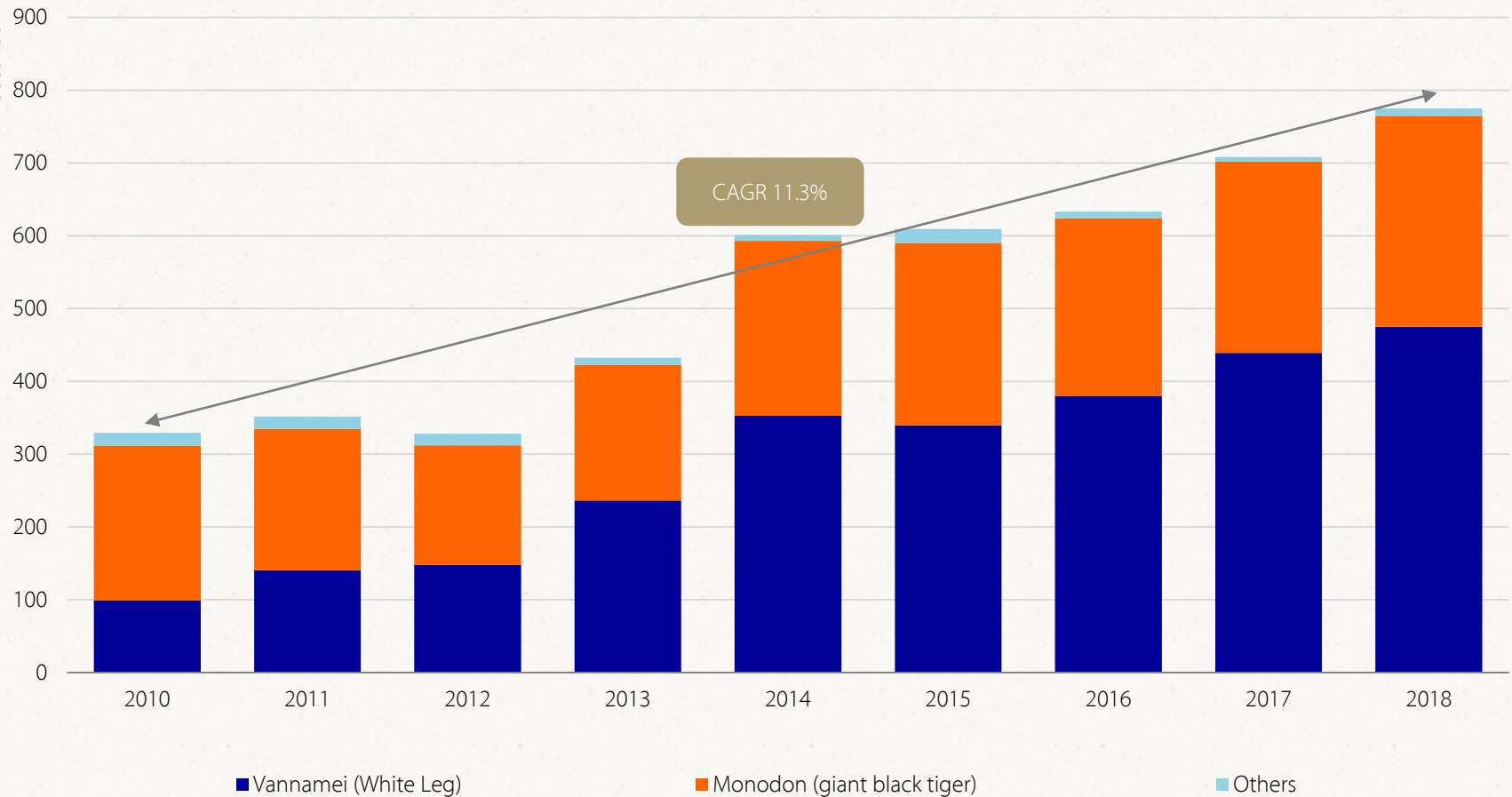


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SE Asia - Vietnam Shrimp production FAO

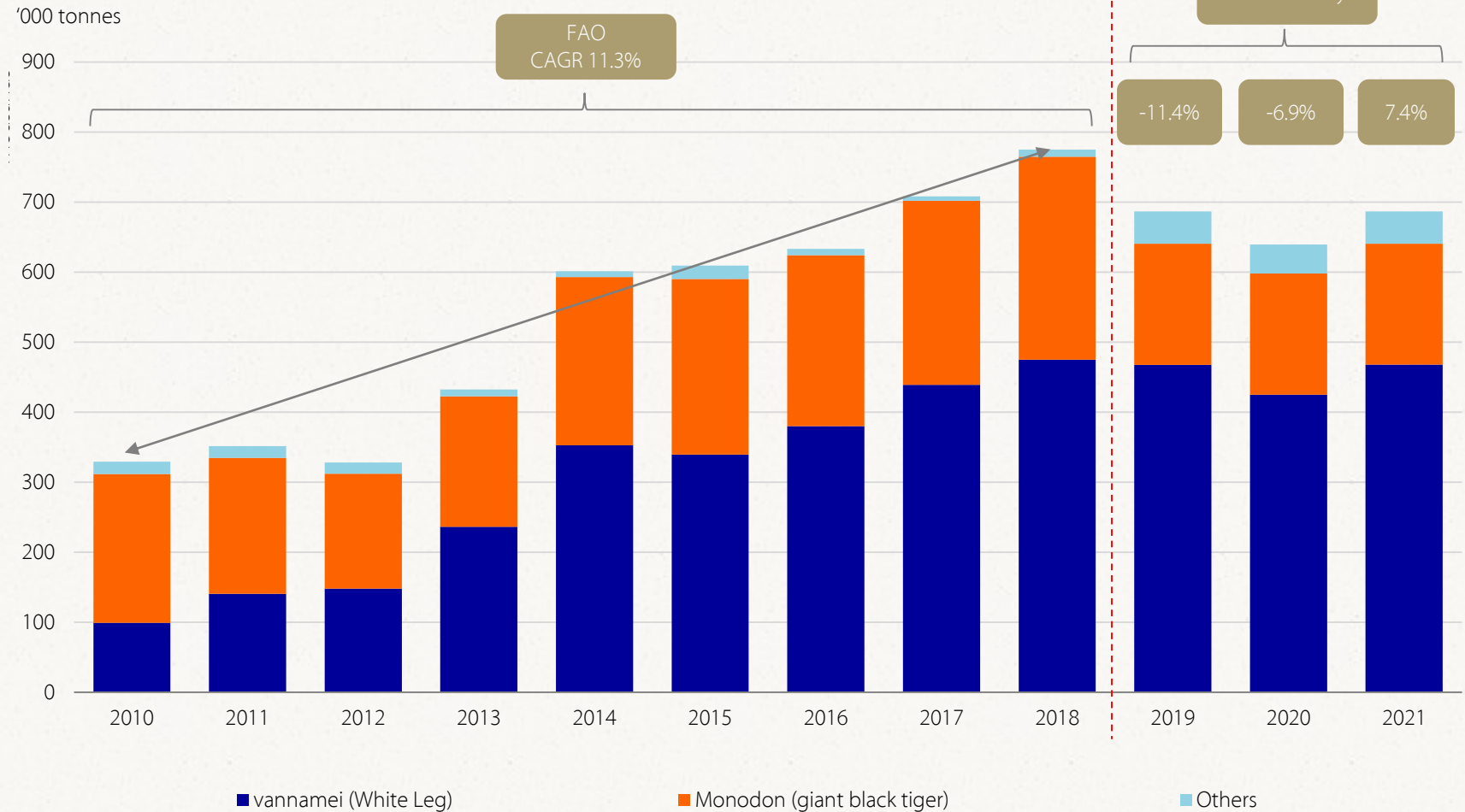
SE Asia - Vietnam Aquaculture Shrimp production FAO

'000 tonnes



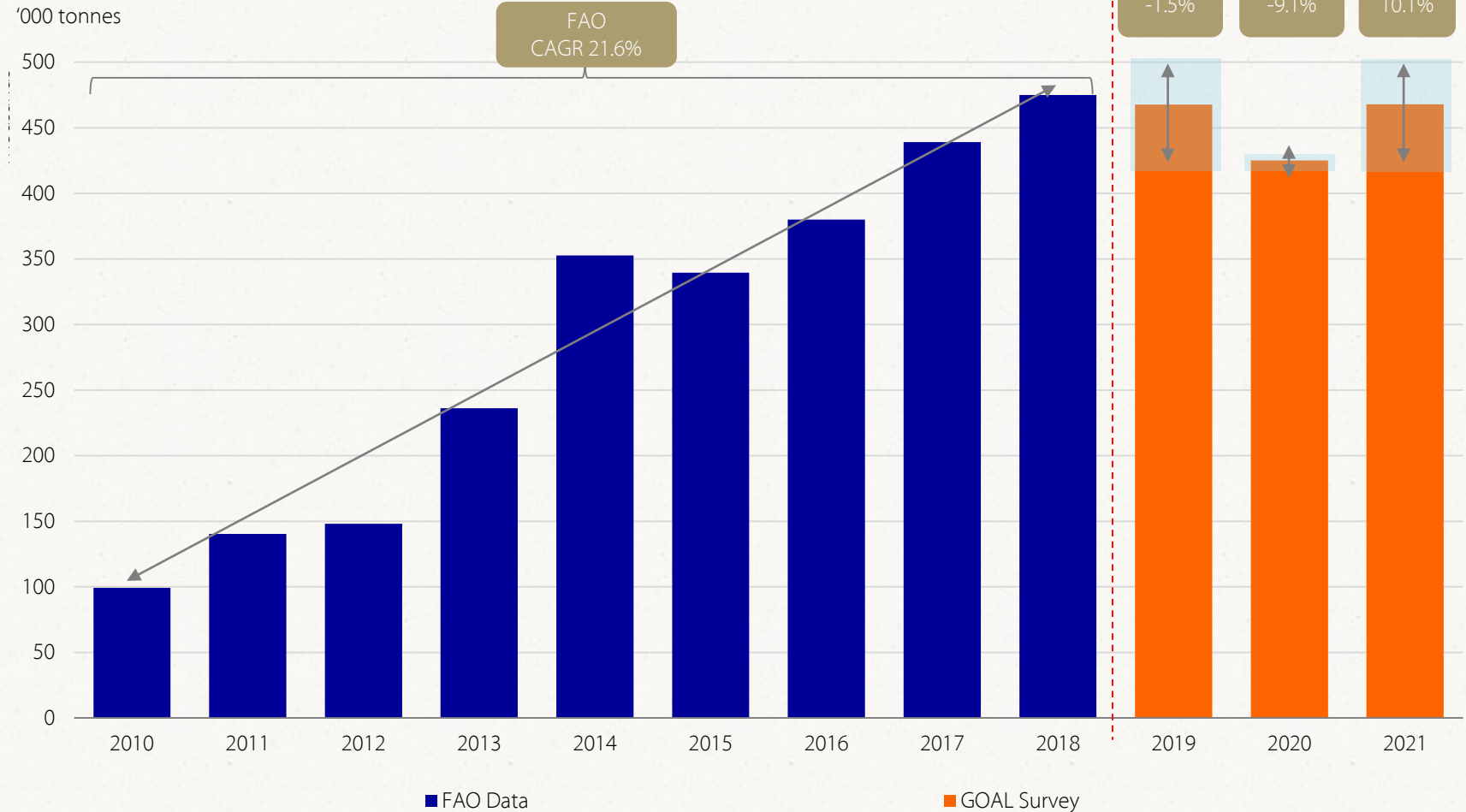
SE Asia - Vietnam Shrimp production forecast

SE Asia - Vietnam Aquaculture Shrimp production FAO



SE Asia – Vietnam - Vannamei forecast only

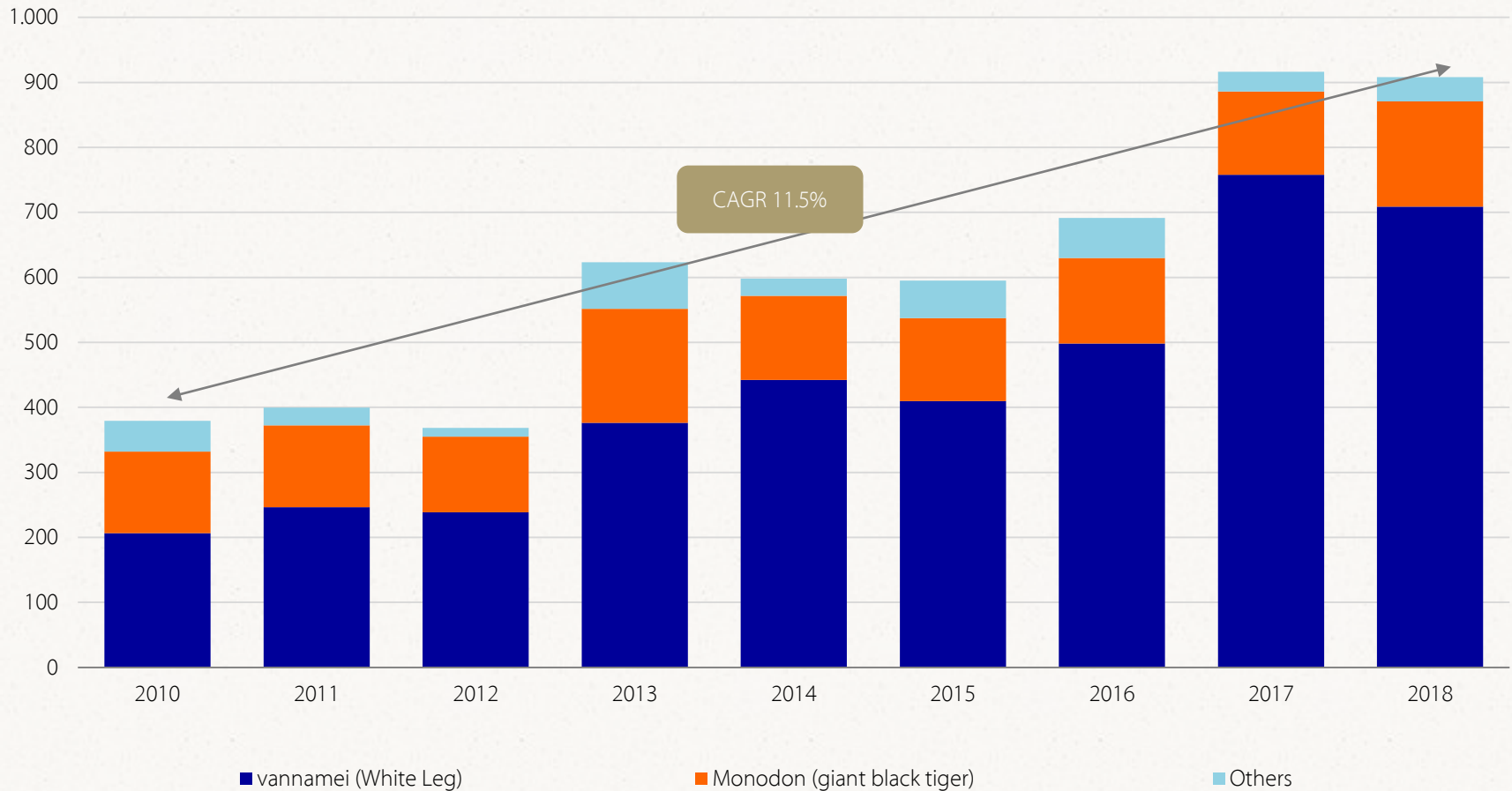
SE Asia Aquaculture – Vietnam - Vannamei (White Leg) Shrimp FAO



SE Asia - Indonesia Shrimp production FAO

SE Asia - Indonesia Aquaculture Shrimp production FAO

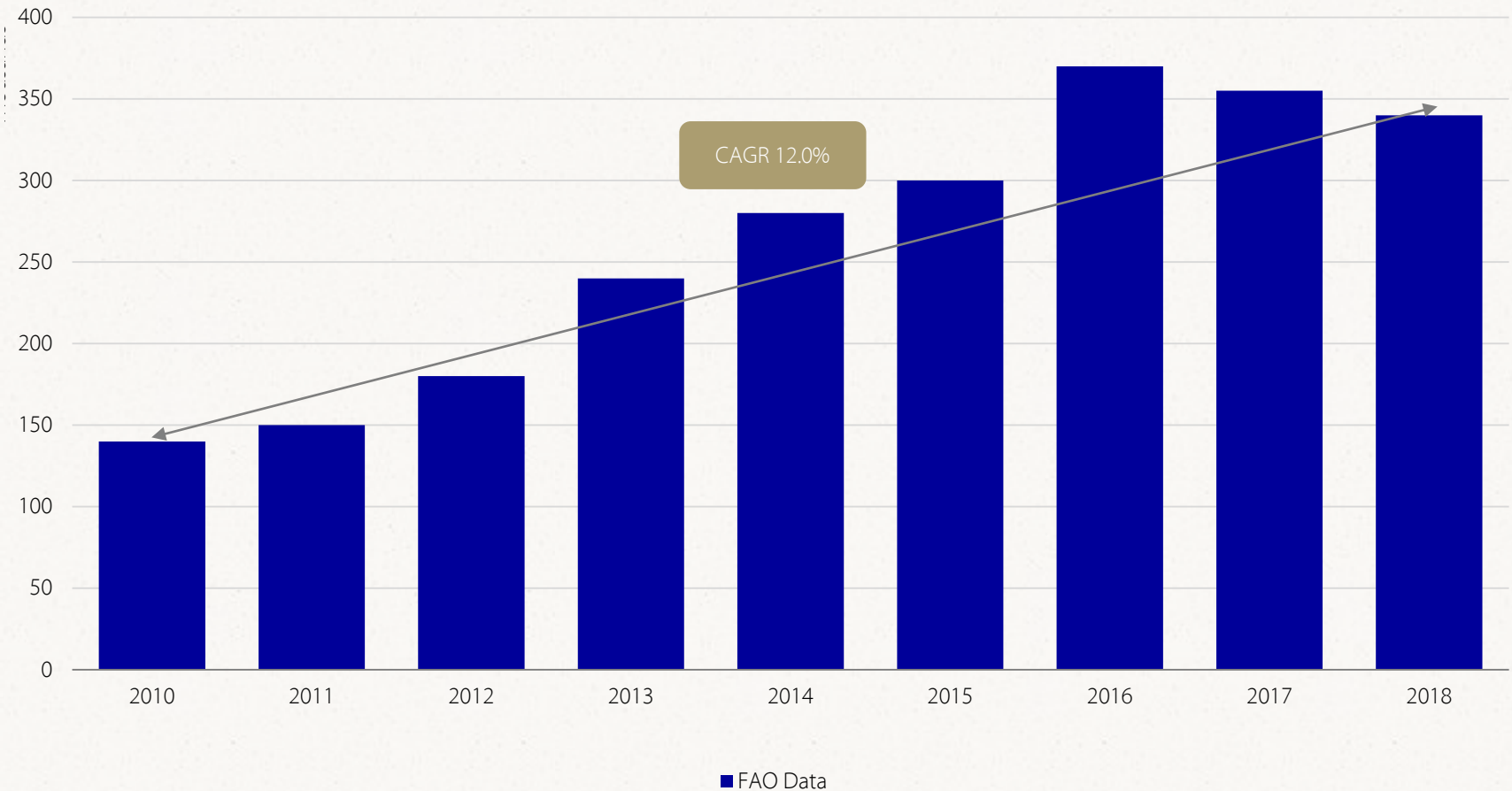
'000 tonnes



SE Asia - Indonesia Shrimp production – Estimated Production

SE Asia - Indonesia Aquaculture Shrimp production – Estimated Production

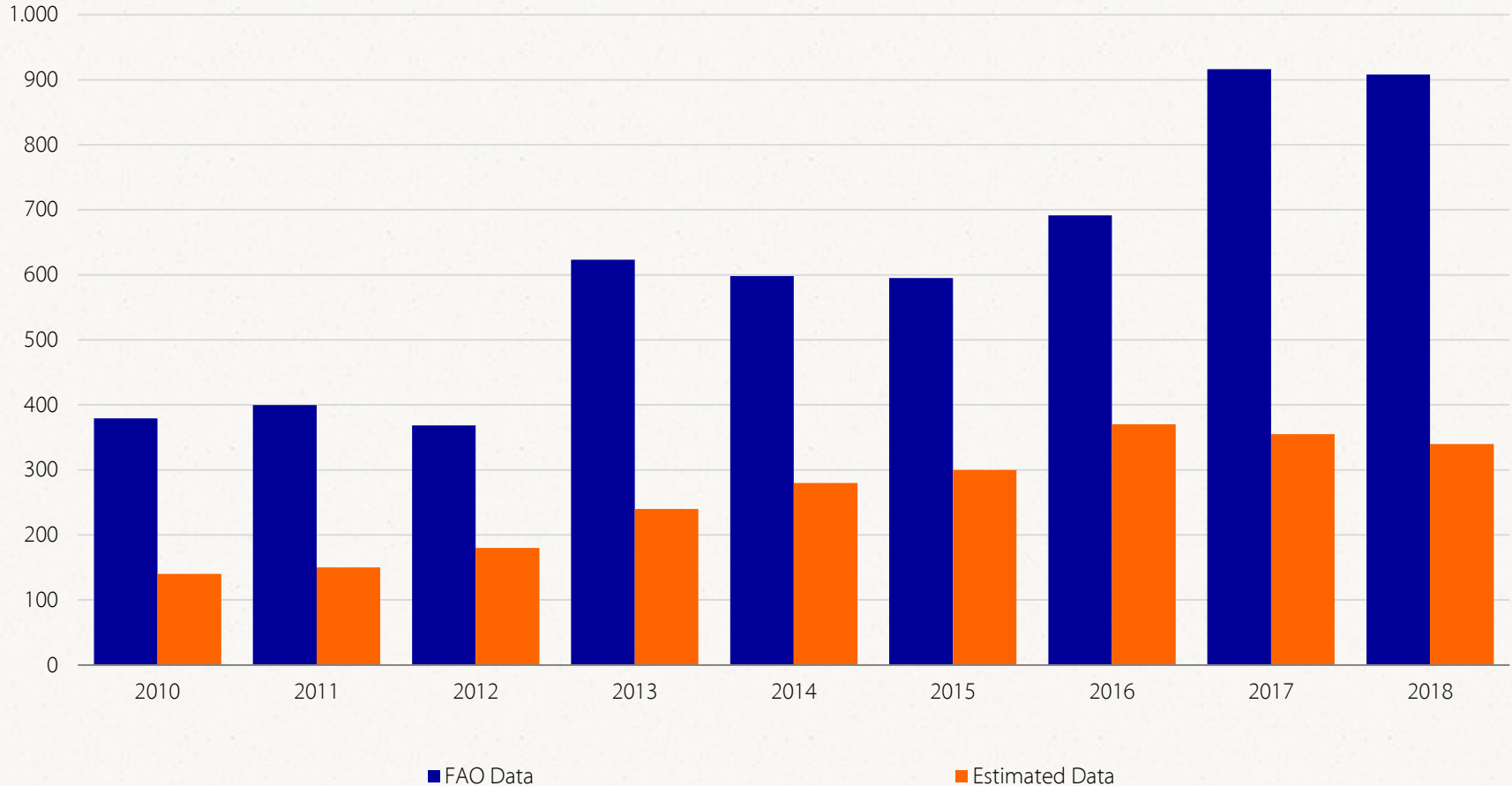
'000 tonnes



Indonesia Shrimp production FAO vs. Estimated

Indonesia Aquaculture Shrimp

'000 tonnes

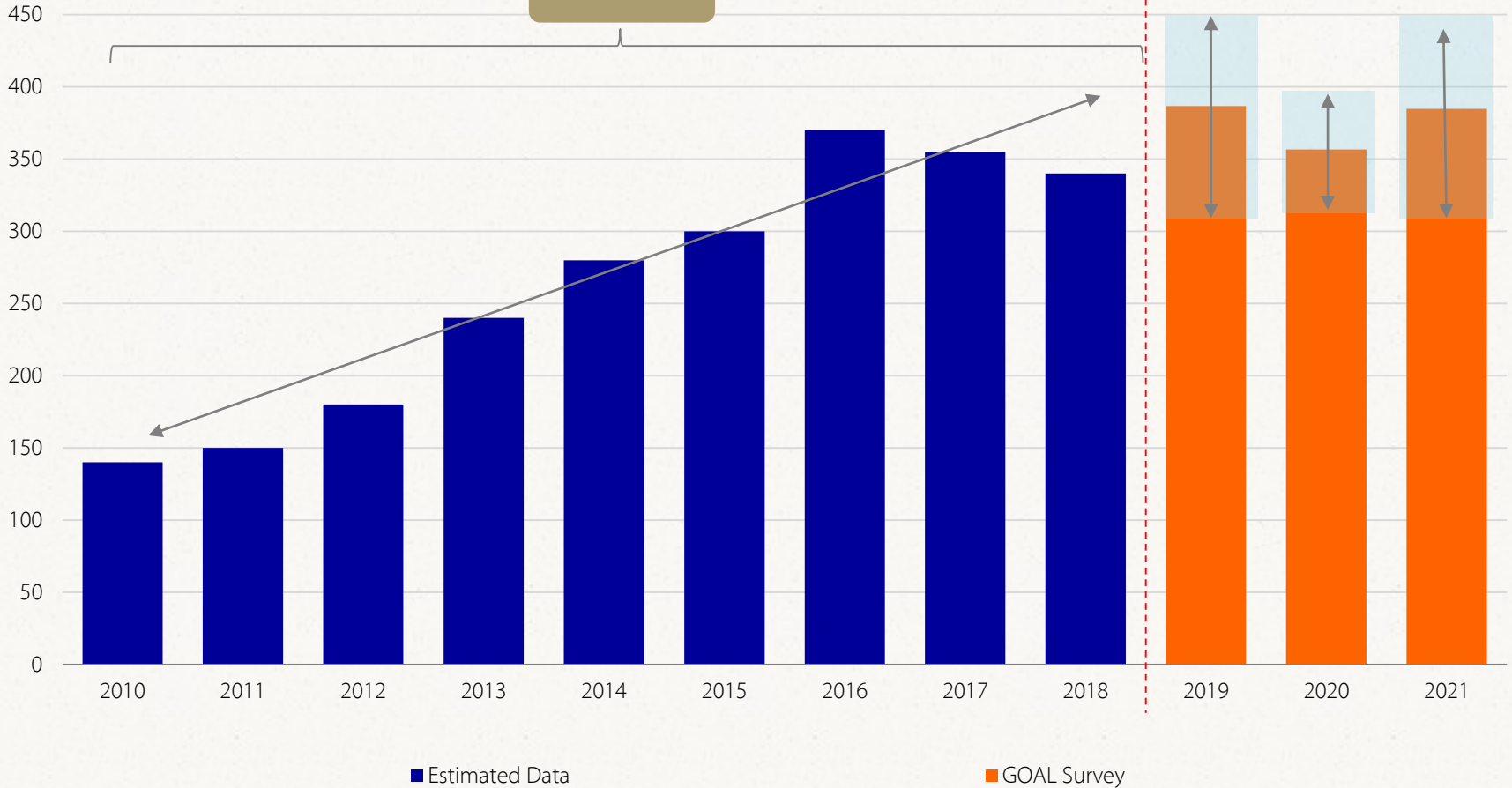


SE Asia - Indonesia Shrimp forecast

SE Asia - Indonesia Aquaculture Shrimp production FAO

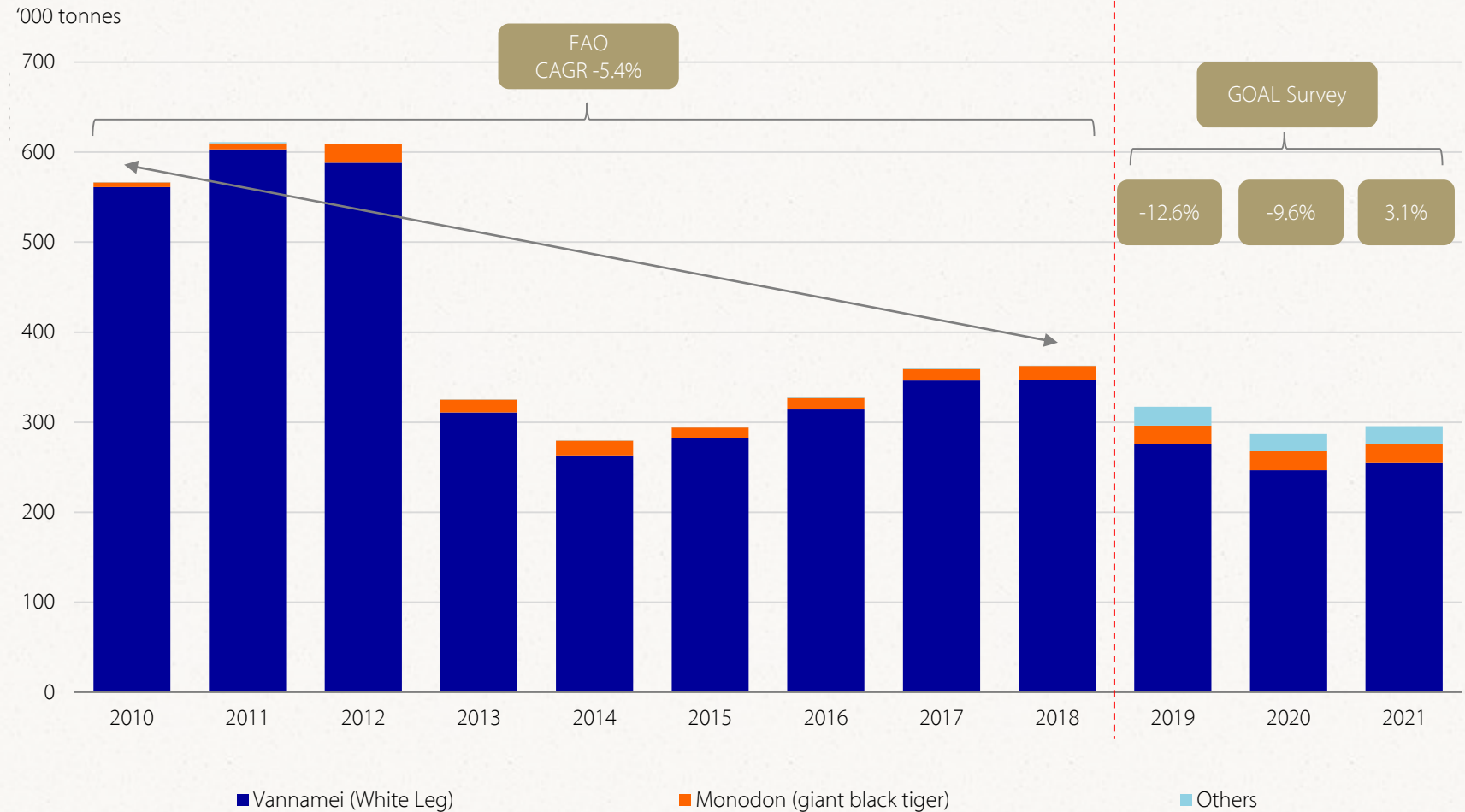
'000 tonnes

CAGR 12.0%



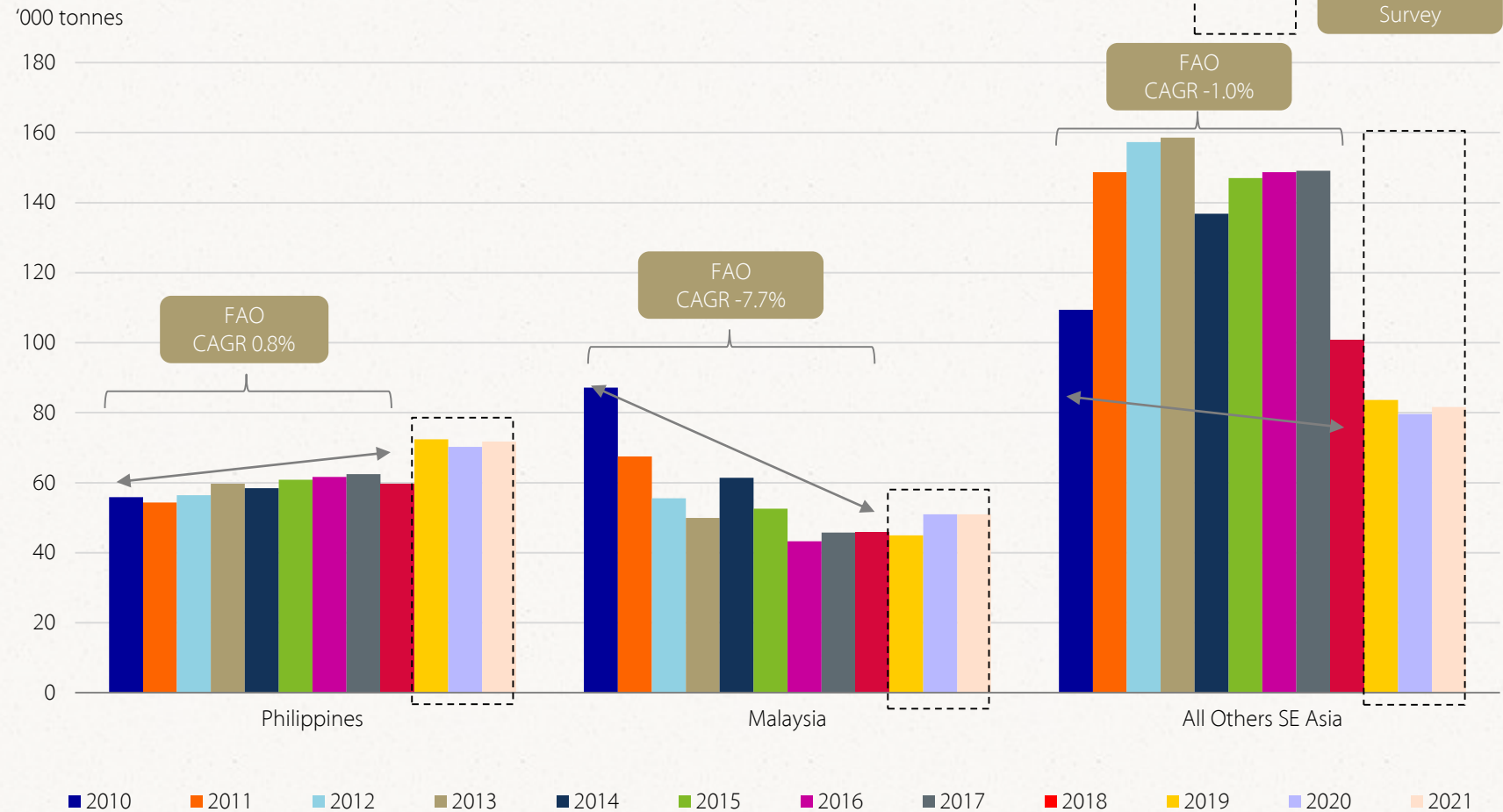
SE Asia - Thailand Shrimp production and forecast

SE Asia - Thailand Aquaculture Shrimp production FAO



SE Asia – Philippines , Malaysia and All Other SE Asia Shrimp production forecast

SE Asia Aquaculture – Philippines, Malaysia and All Other SE Asia Shrimp production FAO



Source: Rabobank, FAO, GAA Survey, 2020
Note* All Others include Bangladesh, Myanmar and Taiwan

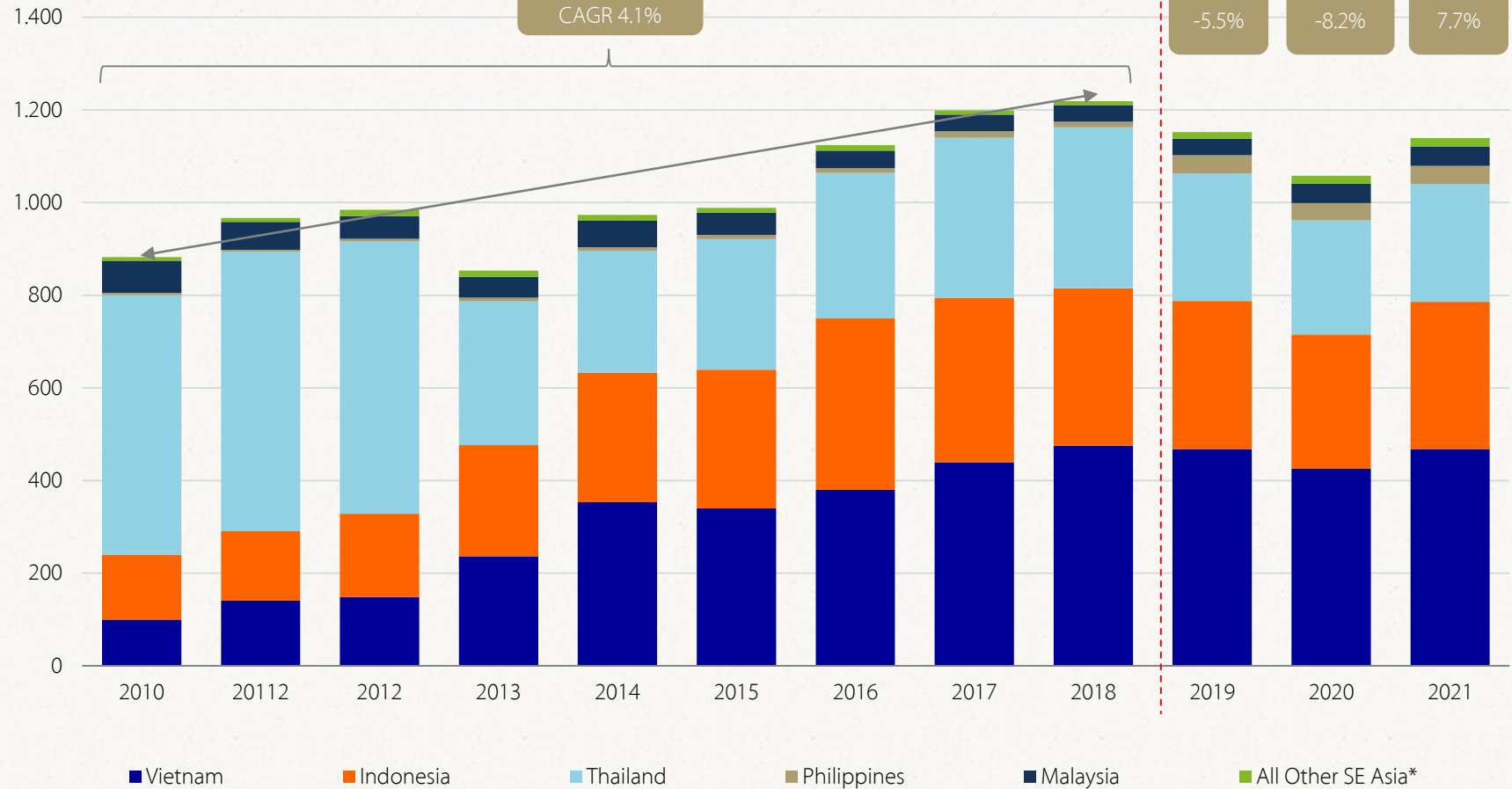


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SE Asia:Vannamei Shrimp production forecast

SE Asia Aquaculture Vannamei (White Leg) Shrimp

'000 tonnes



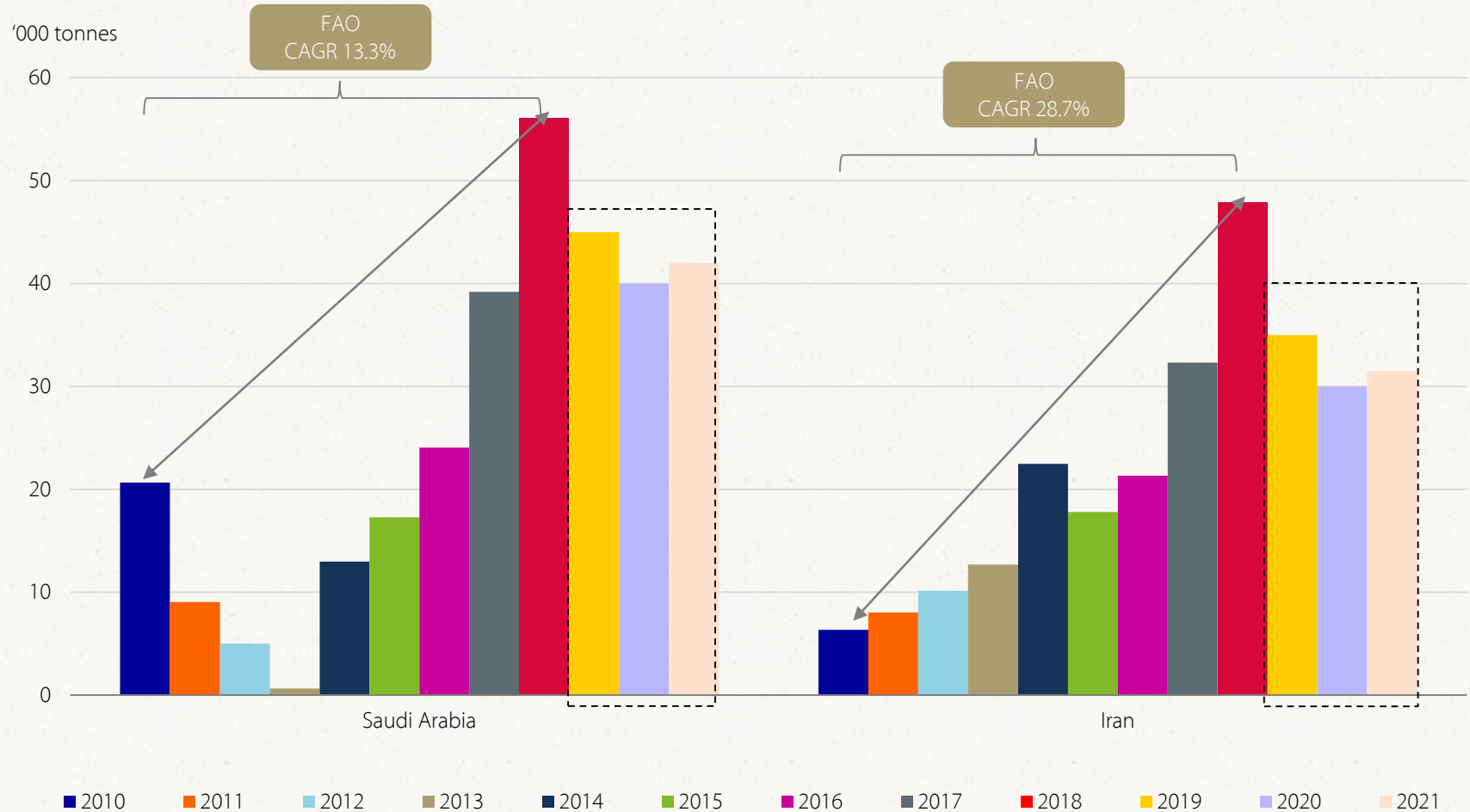
Source: Rabobank, FAO, Robins McIntosh/CP Foods 2020
Note* Bangladesh, Myanmar and Taiwan



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Saudi Arabia and Iran Shrimp production and forecast

Aquaculture – Saudi Arabia, Iran and Australia Shrimp production FAO





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Global shrimp supply and forecast

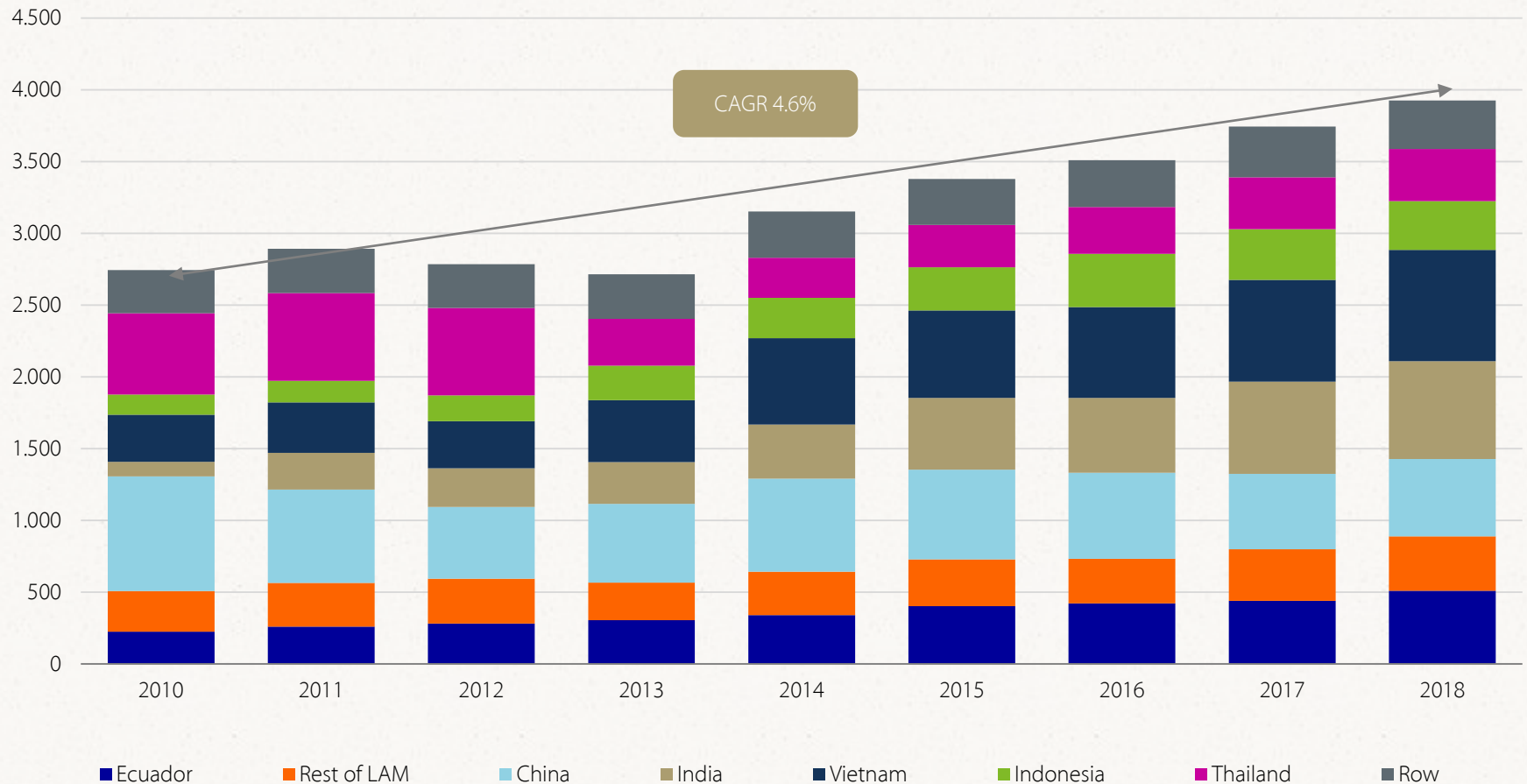


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Total shrimp production (with China and Indonesia estimated)

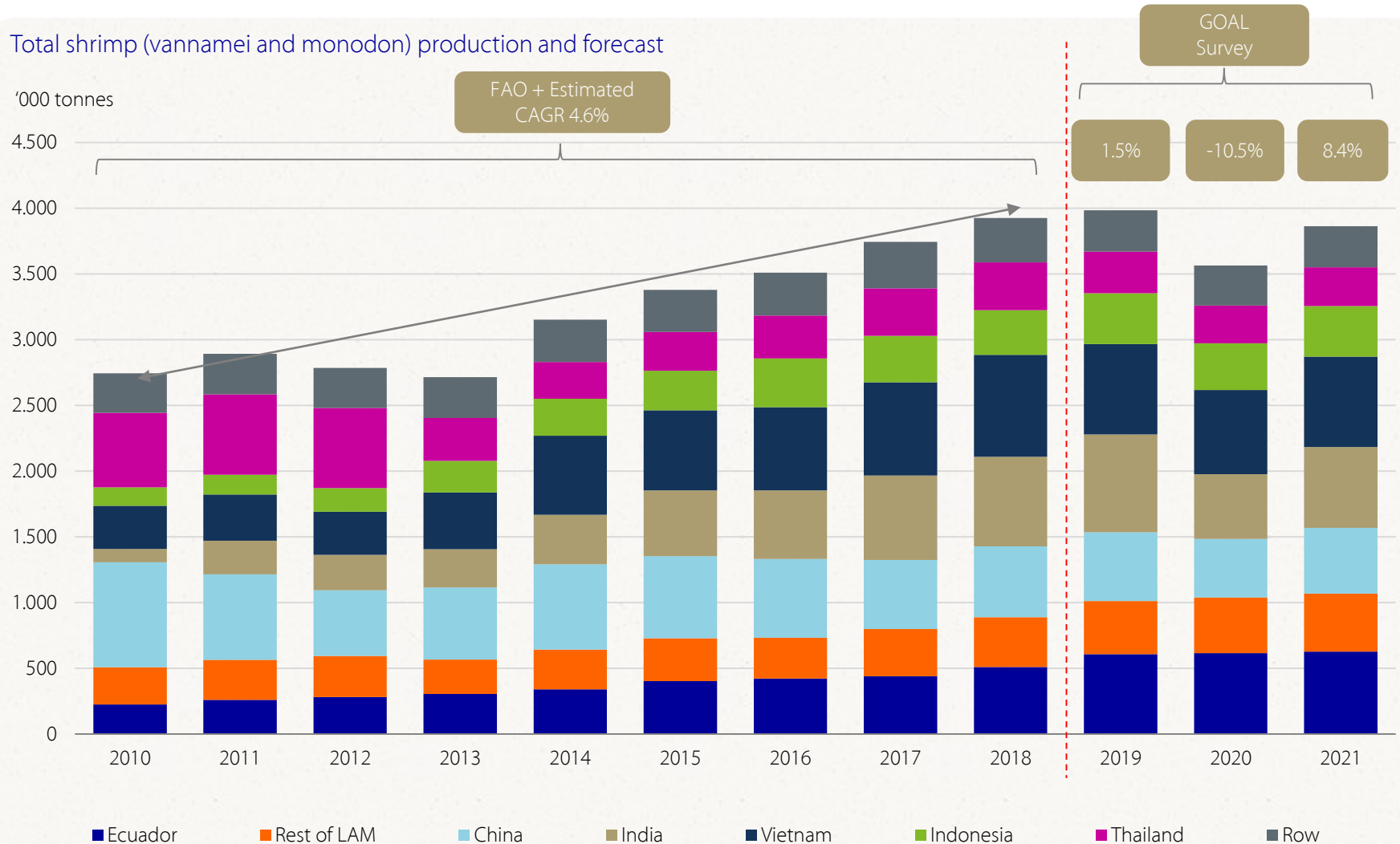
Total shrimp (vannamei and monodon) production FAO

'000 tonnes



Total shrimp production forecast: 10% decline in 2020 is expected

Total shrimp (vannamei and monodon) production and forecast





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Survey Questions



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Survey Question in 2019: The Global Shrimp Market Will Strengthen in 2020 Compared to 2019, Agree, Disagree?

Outlook	Asia	Americas	Others
Strongly Agree			
Agree	Bangladesh, China, Indonesia, Philippines, Taiwan, Vietnam	Ecuador, Guatemala	Egypt, New Caledonia
Neutral / No Opinion	India, Malaysia, Thailand	Mexico, Nicaragua, Venezuela	Australia
Disagree		Belize, Brazil, Colombia, Costa Rica, Honduras, Peru	Madagascar

Strongly Disagree

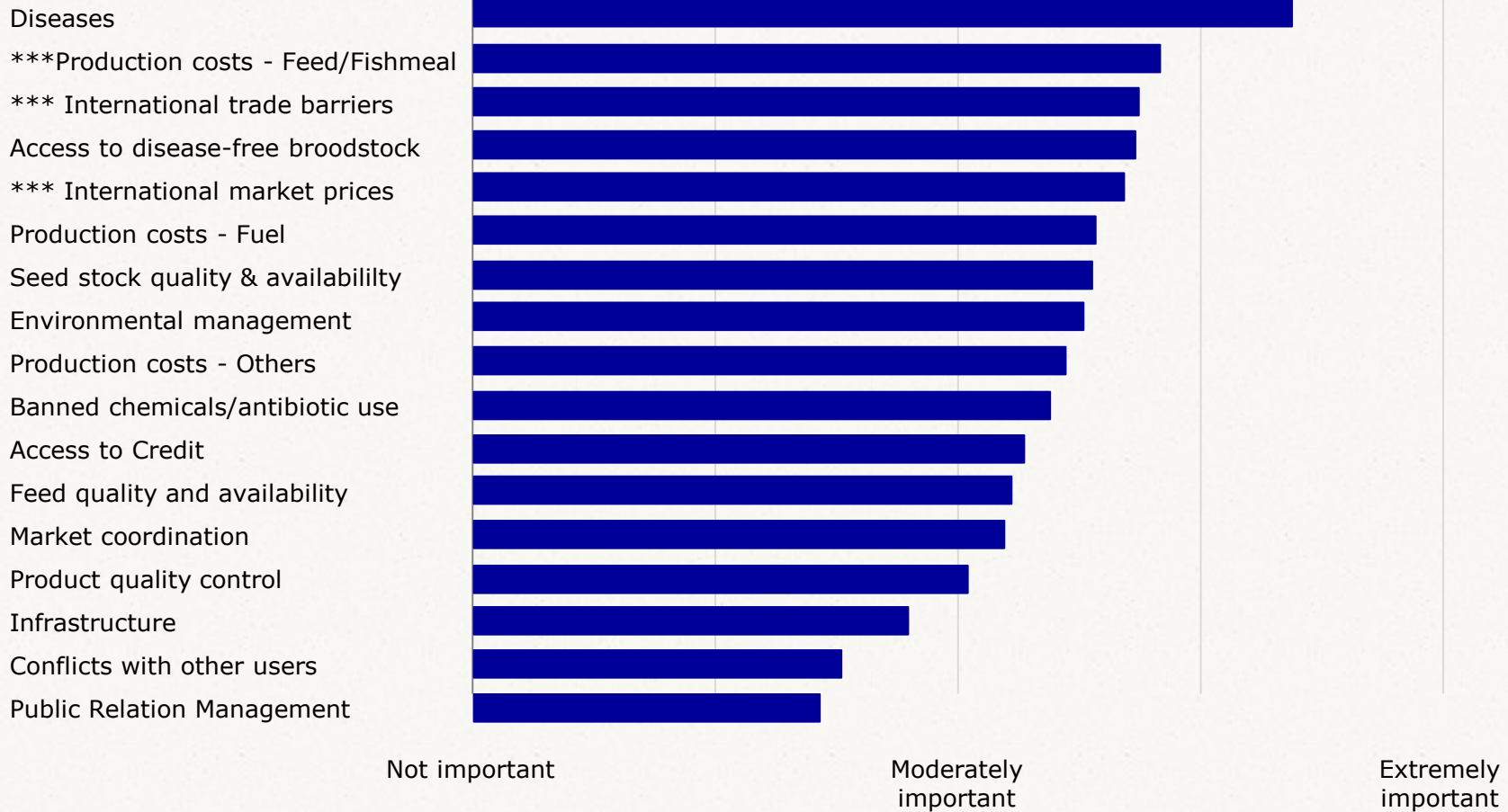
In the 2020 Survey optimism prevails

Question: The Global Market will strengthen in 2021 compared to 2020?

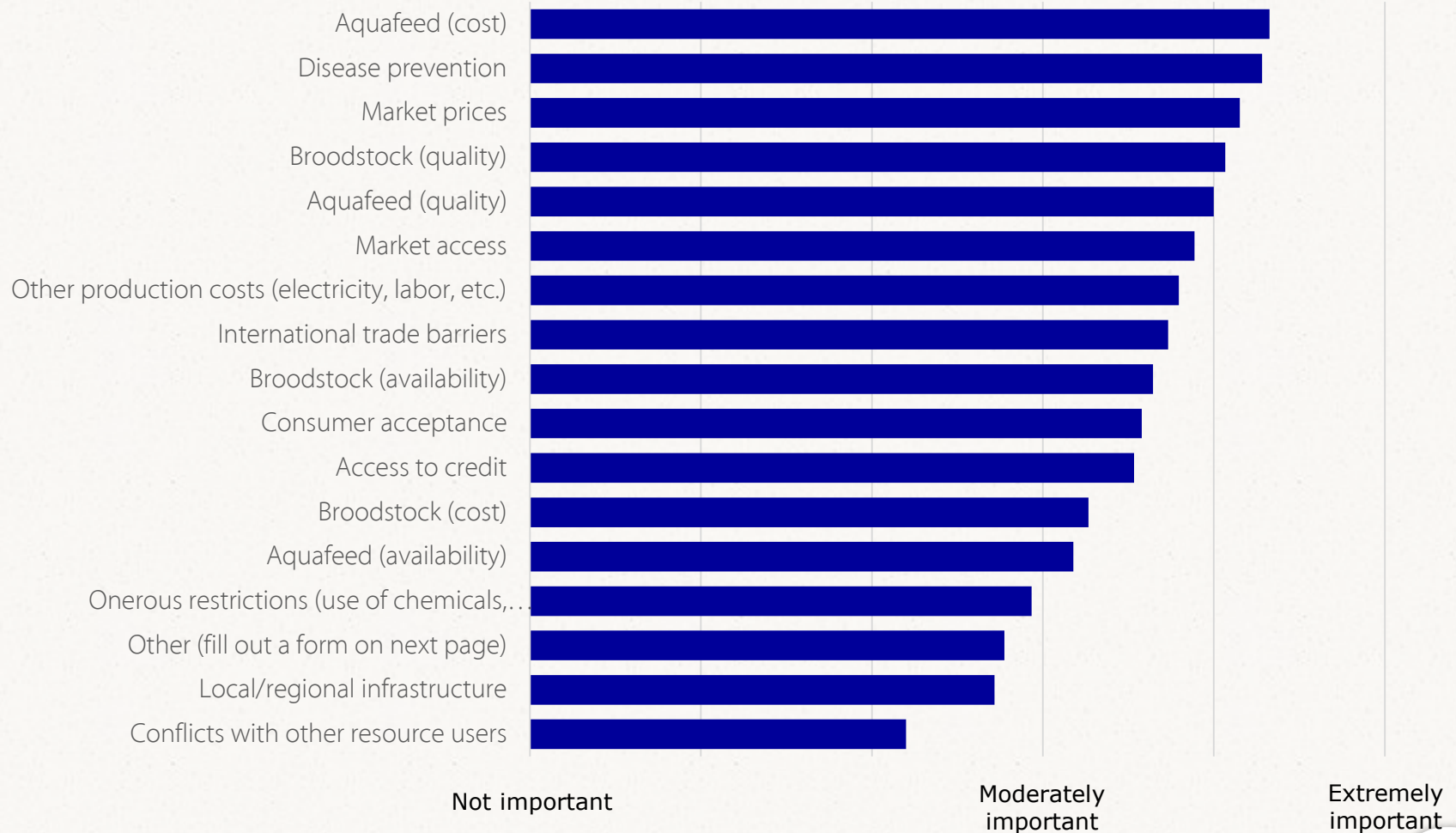
Outlook	Asia	Americas	Europe	Africa
Strongly Agree	China, Philippines	Costa Rica, USA, Ecuador, Colombia, Guatemala, Venezuela		
Agree	Philippines (3), Australia, Japan, Malaysia, New Caledonia, India, Bangladesh	Mexico (5), Ecuador (5), Honduras (2), Peru, Brazil, Chile, Nicaragua, Colombia	Spain, Croatia, Portugal, Malta, Turkey	Tunisia, Morocco
Neutral / No Opinion	China India	Colombia, Mexico (2), Honduras, Costa Rica, Ecuador, El Salvador, Guatemala, Peru, Barbados (4), Bahamas (4)	Albania (4)	
Disagree	Malaysia	Honduras (2), USA, Peru	Spain	
Strongly Disagree	New Caledonia, Philippines	Ecuador		

Goal 2019 Survey – What are the key issues that are faced by shrimp aquaculture industry

What are the key issues that are faced by shrimp aquaculture industry?



Goal 2020 Survey – It seems the price of feed is now the key concern, with disease prevention a close second



Closing remark: 2010 – 2020 was a strong decade for shrimp despite many challenges; 2021 to be a recovery year

Region	CAGR 2010-2020	2021 expected
India	19.3%	4.3%
Ecuador	10.7%	1.9%
Vietnam	15.7%	7.4%
China	-5.7%	12.4%
Indonesia	3.5%	7.9%
Thailand	-7.9%	3.1%
Mexico	3.2%	2.0%
Total	2.6%	8.4%