

Extrait du rapport de la FAO Globefish – Production et commercialisation du Tilapia - January 2014

Production in China is currently reported to be down by 30% while other producers in Asia, Africa and Latin America continue to intensify tilapia farming. Demand remains firm, which will help keep prices steady and strong.

China

Official figures for tilapia production have not been released yet but tilapia production was estimated to be 1.5 million tonnes in 2012, up from 1.4 million tonnes in 2011 in response to increased domestic and foreign market demand. However, industry sources report at least a 30% decline in production to date and attribute this to farmers' financial constraints to restock ponds, affected by the harsh weather conditions in 2012.

In the first six months of 2013 total tilapia exports from China reached 161 200 tonnes, 7% more than a year ago. In value Chinese tilapia exports were higher by 11% with a value close to USD 543 million.

The frozen fillet category took the largest share of tilapia exports (45%) but posted negative growth both in volume (-7%) and value (+3.6%). Exports of frozen fillet to the USA, the main market, were down by about 18% while Mexico imported 34% more. Exports of frozen fillet also increased to the EU markets of Spain (+32%), Poland (+62%) and Germany (+19%). In Latin American Costa Rica, Peru and Colombia also imported more while exports to Iran and Southeast Asia (Malaysia, Viet Nam and Thailand) increased by 138% each.

Whole frozen tilapia exports in contrast experienced a 24% rise in volume while in value, they increased by 44% to USD 124 million. This category also took a larger share of the total export volume at 36% compared with 32% in the previous reporting period. The growth was largely facilitated by higher demand from Africa and the Middle East markets.

EU

Frozen tilapia fillet imports increased by 13% during the first six months of this year, continuing the positive trend from the first quarter. Asian exporters dominated the market, supplying 99% of imports with China in the lead followed by Indonesia, Viet Nam and Thailand. Imports increased from all Asian sources except from Malaysia. The EU-27 imported 8 353 tonnes of frozen tilapia fillet during this period.

Taiwan Province of China

Taiwan PC exported 32% more frozen tilapia during the January-June 2013 period at 18 400 tonnes compared with a year ago, with frozen whole tilapia taking a 90% share. Exports of this category (16 564 tonnes) increased to almost all markets except for Saudi Arabia, Japan and Qatar.

As a part of a Belize-Taiwan Aquaculture Project, the latter has donated USD 651 725 to the Ministry of Agriculture of Belize making it the second donation toward the five-year tilapia project that will cost approximately BZD 5 million. The project aims to provide male tilapia fingerlings to small-scale farmers around the country.

USA

This year's lower production in China (down by 30%) has pushed prices up amidst renewed interest in the US market. Buyers are reportedly securing products for the year-end to avoid shortages. Industry sources say that current buying activity is strong and there is a shortage of 7-9 oz/pc size; buyers are going for 3-5 oz/pc size instead. Despite current interest, average import prices declined from USD 3.78/kg during January-June 2012 to USD 3.65/kg in the same period in 2013, but are expected to end higher during the rest of 2013.

Demand for high value fresh/chilled (air-flown) tilapia fillet continues to rise despite increasing prices. During the first six months of 2013 imports of fresh/chilled tilapia fillet shot up to 14 092 tonnes valued at USD 102.1 million (up 65% in volume and 71% in value) against the same period last year. Lower supplies of frozen fillet from China and also from Indonesia were quoted as the main reason for the trend. Honduras overtook Ecuador as the largest supplier of fresh tilapia fillet to the market followed by Costa Rica. Both countries managed to increase their shipments by 53% and 180% respectively this year, while supply from Ecuador declined by 3.2%. These three countries contributed almost 75% of the total imports fresh/chilled tilapia fillet to the US market.

Supplies of frozen tilapia during the first half of 2013 declined 16% from the same period last year, while the value of imports declined by 18%. Supplies of frozen fillet from China were significantly lower (-21%) as more whole frozen fish is diverted to African markets. Domestic markets in most supplying countries are also absorbing more products to cater for local demand.

Uganda

Tilapia from Uganda will soon be available on the market in Germany, bringing in more income for commercial fish farmers and local fishermen. Demand for tilapia is on the rise although Nile perch is still widely available in the domestic market. During the January to May period in 2013 Germany imported 1 170 tonnes of frozen tilapia fillet, with 80% coming from China and Indonesia. In the meantime, plans are underway to link the fisheries sectors of Uganda and Germany to enable the exchange of technical knowledge and strategic investment. Over 15 500 tonnes of fish were exported mostly to Europe in 2011, with Nile perch species contributing a larger percentage. However, demand for tilapia has pushed prices up in the recent months.

Africa

The African Development Bank (AFDB) is providing finance for an agro-industrial project to increase tilapia farming in Zimbabwe on Lake Kariba reported the Zimbabwe Standard. The ambitious project hopes to increase tilapia production by seven times the current level by 2015 and to produce 20 000 tonnes of fish. Demand for tilapia is growing in the countries adjacent to Zimbabwe. The Democratic Republic of Congo, Zambia, South Africa, Malawi and Angola together require 100 000 tonnes of imported fish annually, with a combined fish consumption of 1.3 million tonnes. The project will create around 900 new jobs by 2015 and it is hoped that it will contribute an estimated USD 33 million to the country in the next 10 years.

Colombia

Local production of freshwater species has increased substantially reaching a total of 61 500 tonnes in 2011 of which tilapia comprised 78%. The regions of Huila, Valle del Cauca, Tolima and Meta are the main producing centers of this kind. In terms of exports, the main item is frozen fish, which last year exceeded 41 000 tonnes. Tilapia exports from Colombia almost entirely enter the US market.

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