

October 2020 Webinar



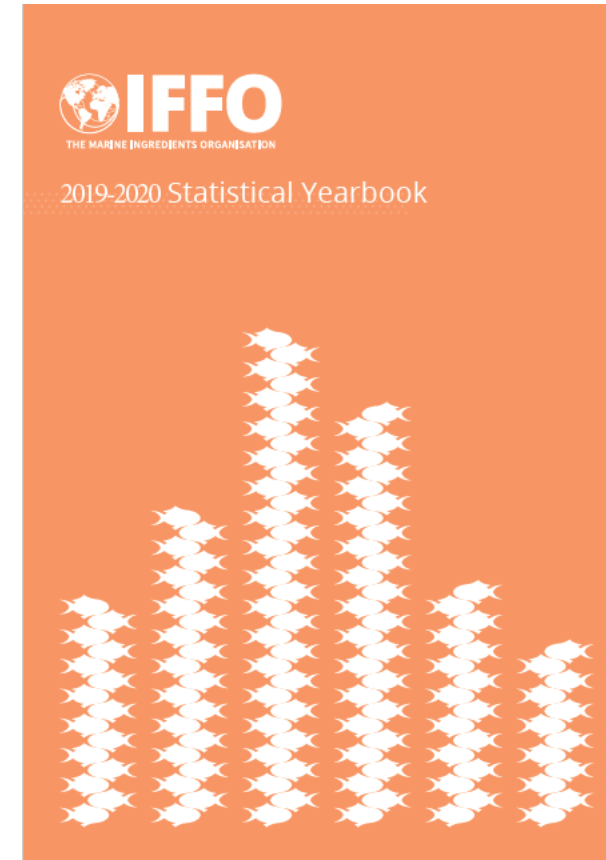
Demand Analysis: trade and consumption

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2019-2020 Yearbook

- The content of this presentation is based on the graphs and statistics published in the Yearbook
- The focus is on the trade and consumption of marine ingredients worldwide



Methodology

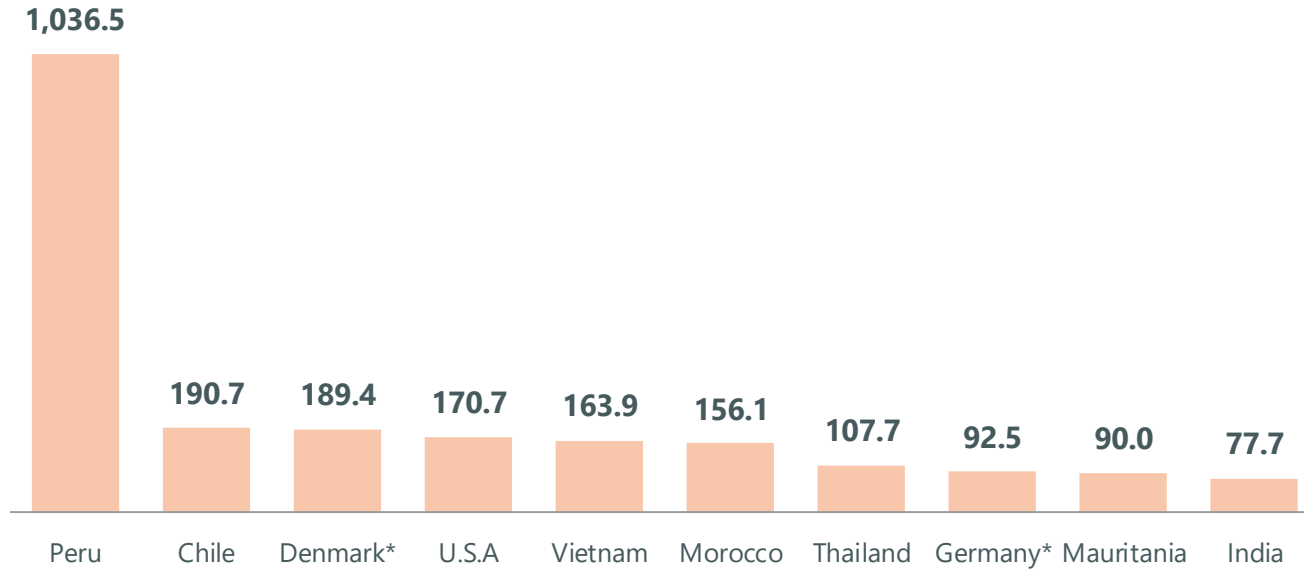
- Dependent on **FAO** downloads for **animal-farming production data** (by country)
- Production data then collated into regional data
- **Aquaculture species collated into groups** (e.g. marine finfish, salmonids, tilapias, other freshwater)
- Groups were formed based on understanding of species which are fed farmed fish
- Expert opinion and consultation used to provide an overview of **various parameters, e.g. % fed; FCR; % FMFO inclusion in feed**
- These figures then used to provide overview detail on FMFO volumes used per species group, by region
- Provides useful detail on segregation of aquaculture market





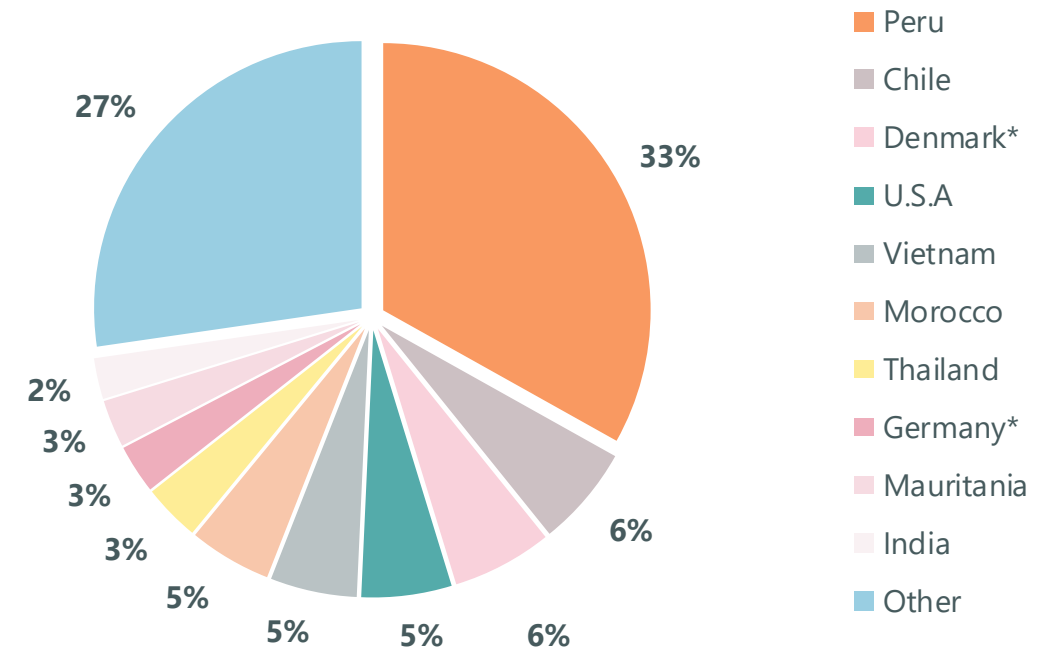
Fishmeal exports

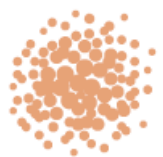
Fishmeal export (000 mt) 2019



*including re-export

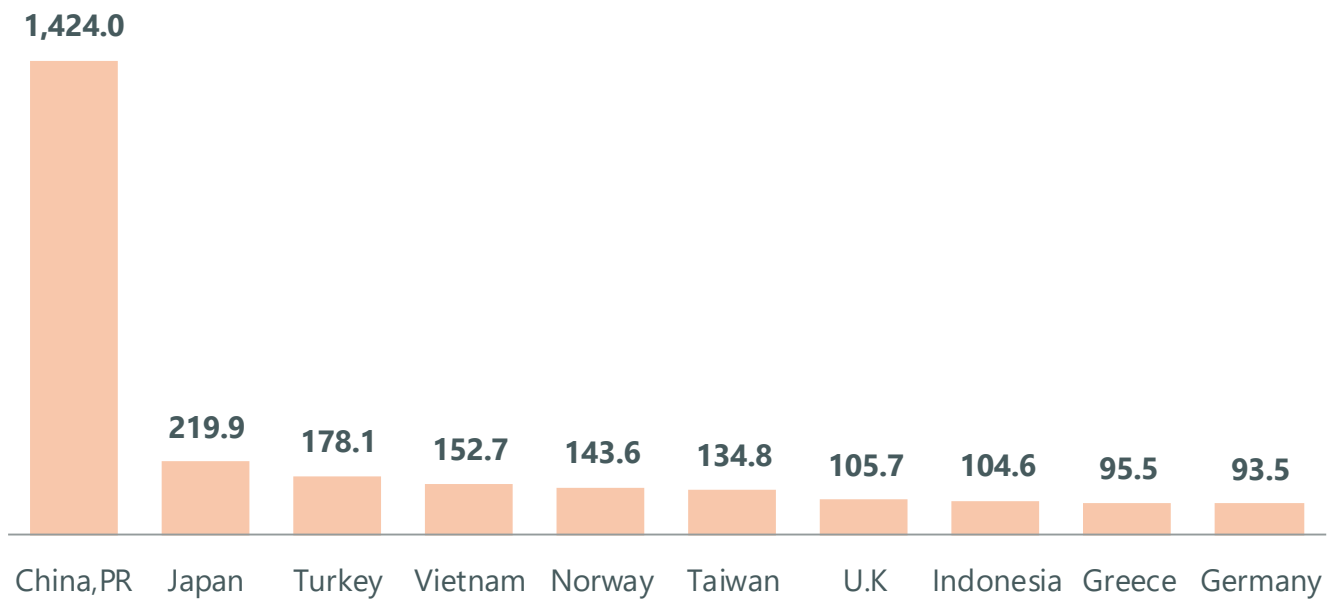
Fishmeal export (%) 2019



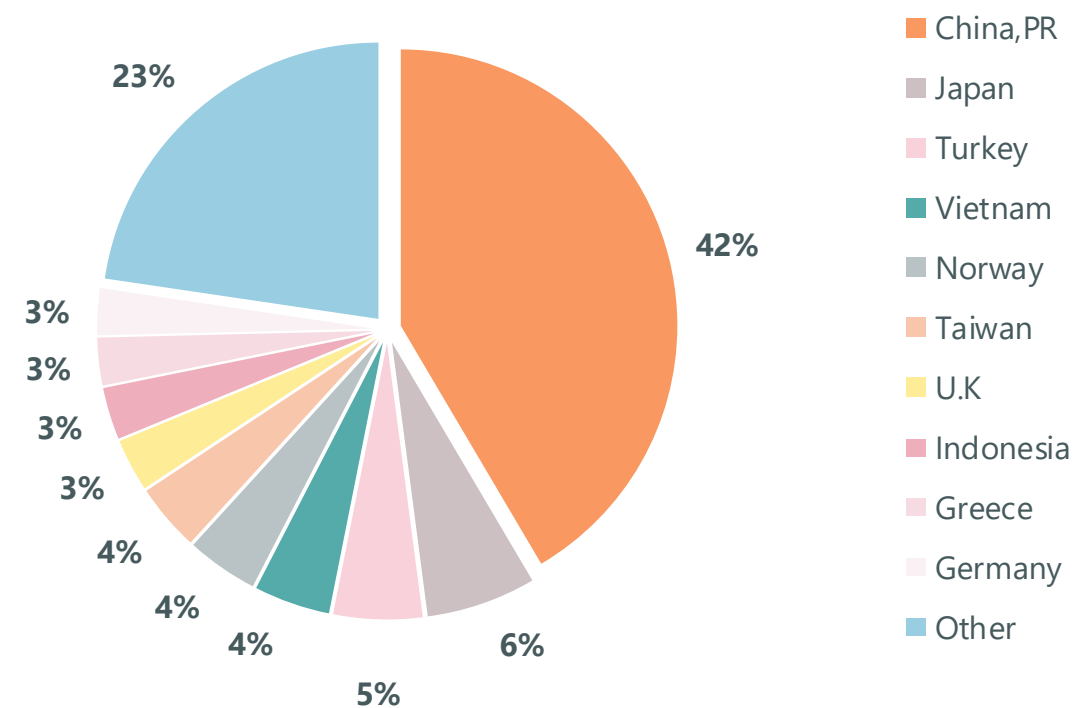


Fishmeal imports

Fishmeal import (000 mt) 2019



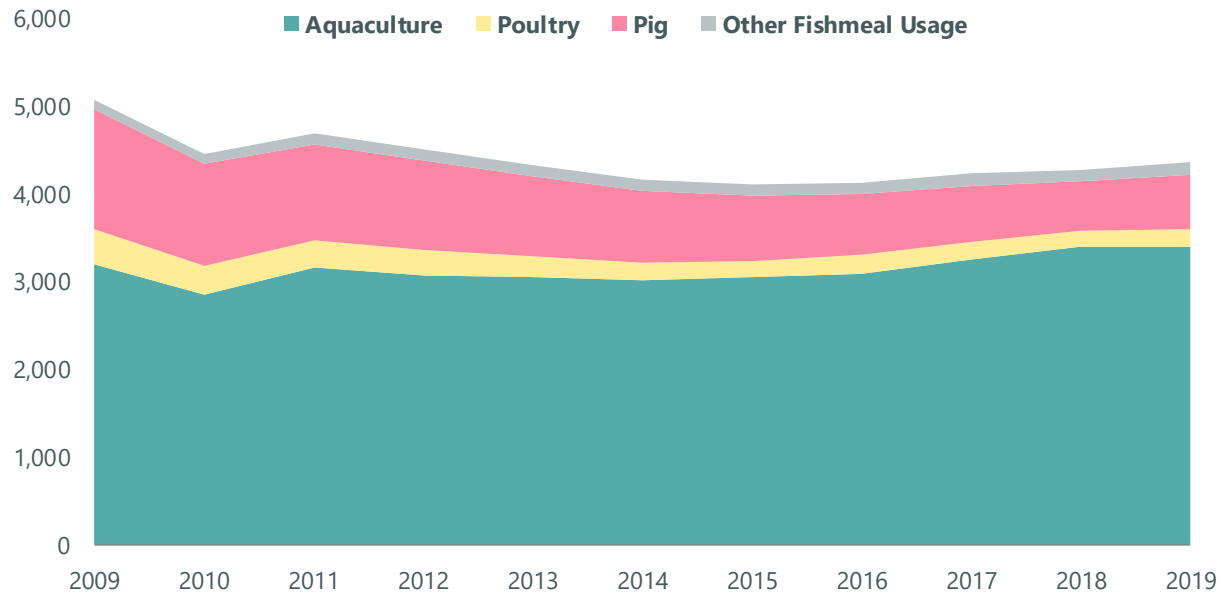
Fishmeal import (%) 2019



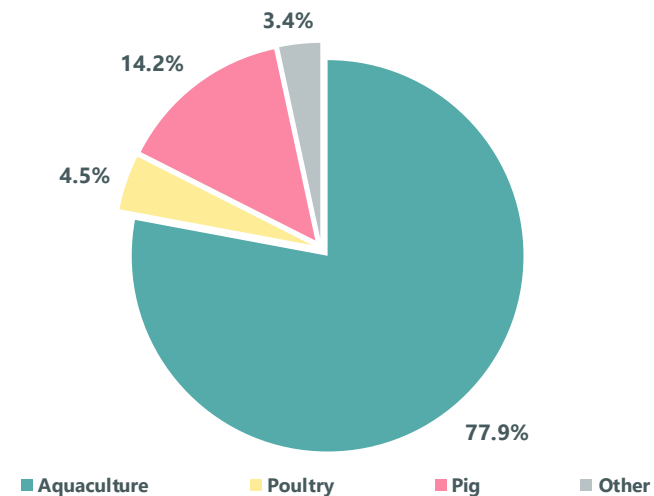


Total fishmeal use

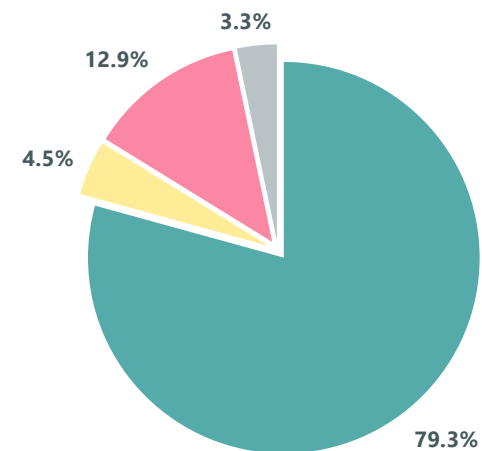
Total fishmeal use ('000 mt)



Use of fishmeal by market in 2019

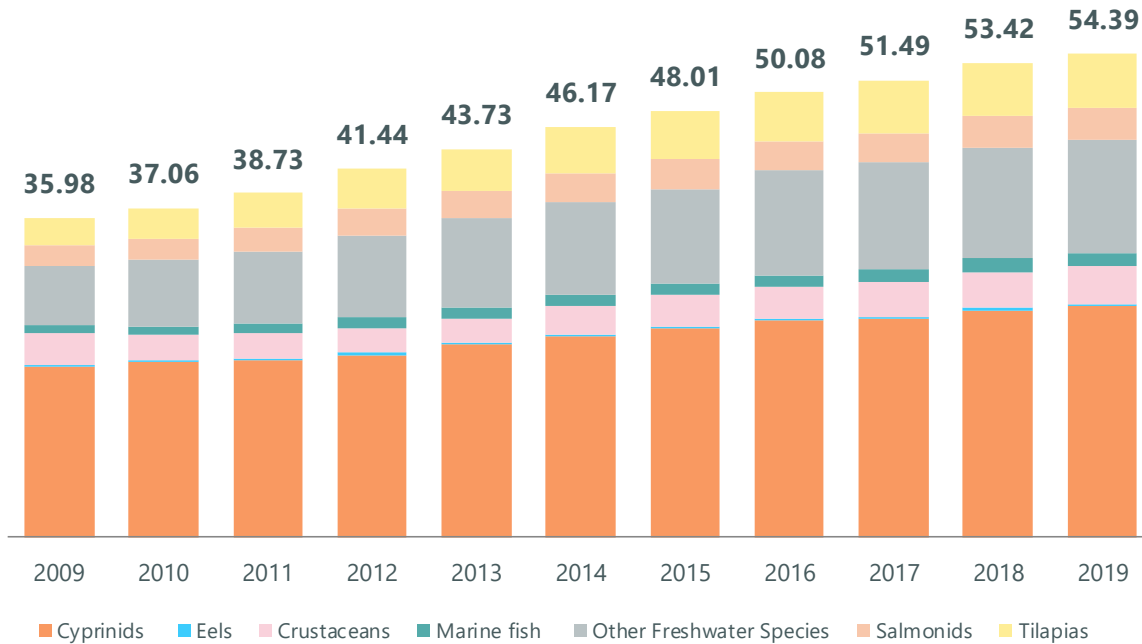


Use of fishmeal by market in 2018

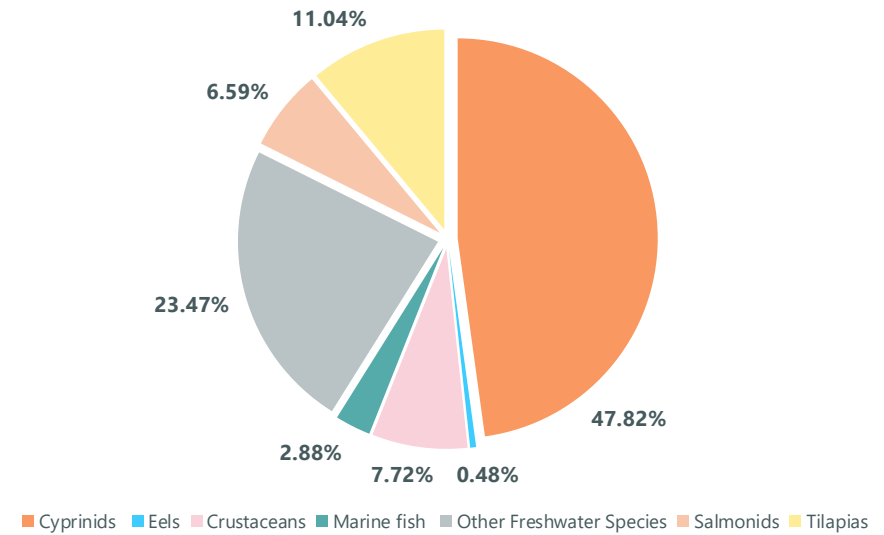


Aquaculture production per species

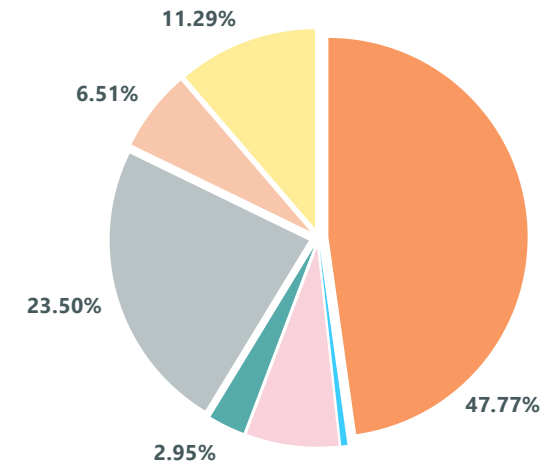
World fed-aquaculture production by species (million mt)



World fed-aquaculture production by species in 2019

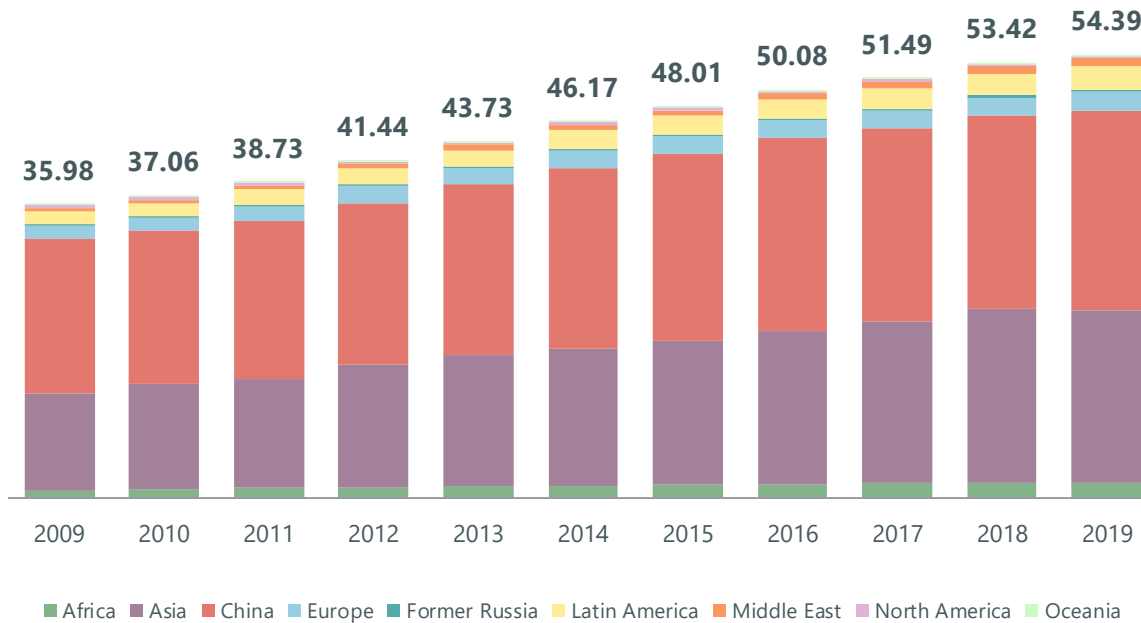


World fed-aquaculture production by species in 2018

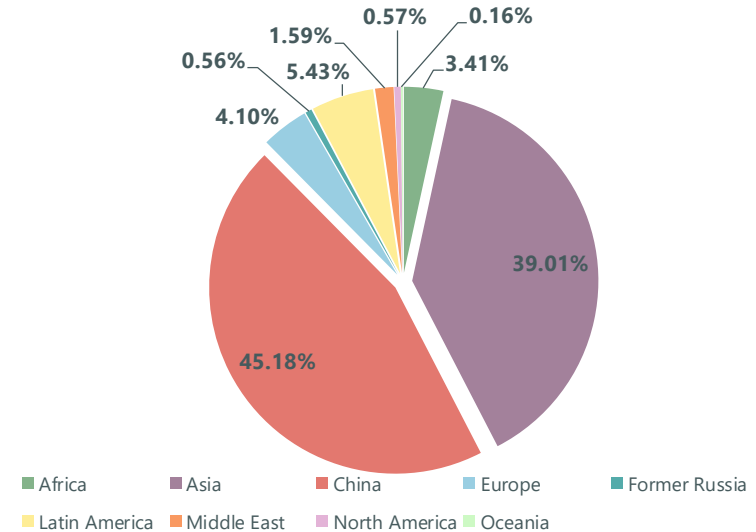


Aquaculture production per region

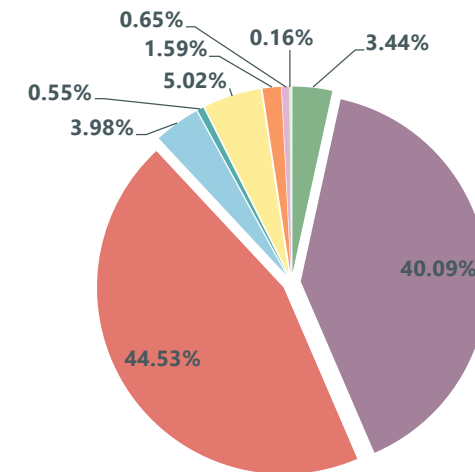
World fed-aquaculture production by region (million mt)



World fed-aquaculture production by region in 2019



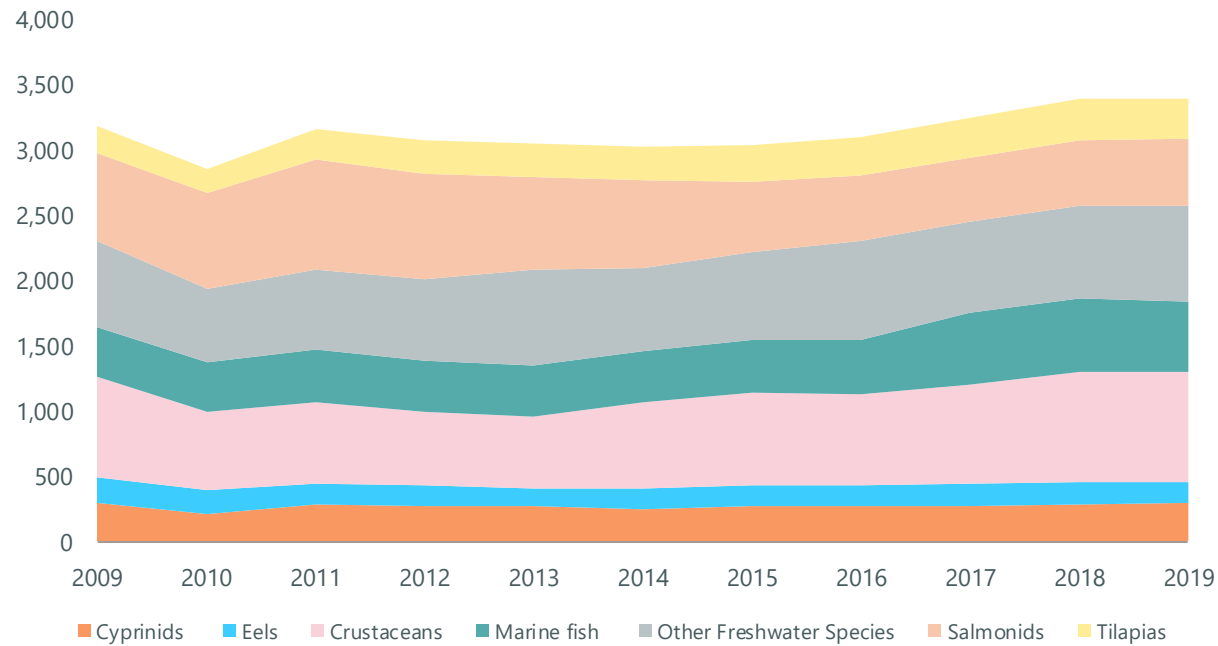
World fed-aquaculture production by region in 2018



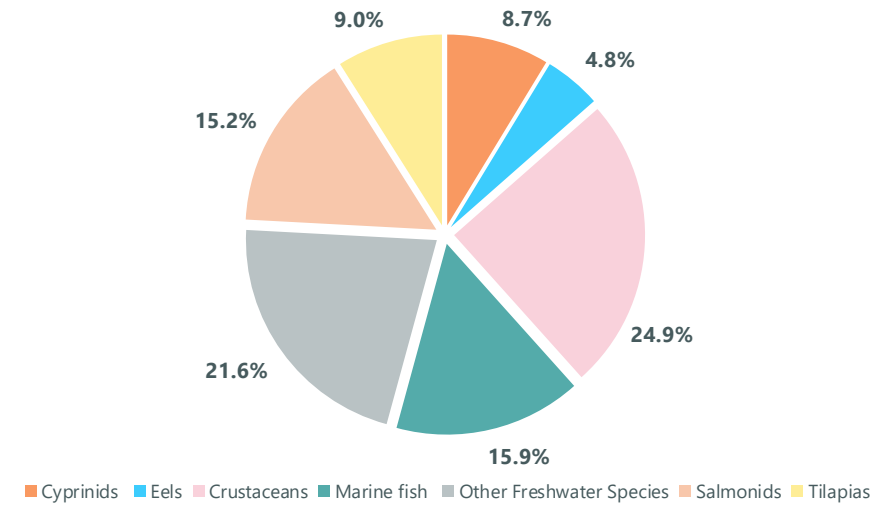


Use of fishmeal in aquaculture per species

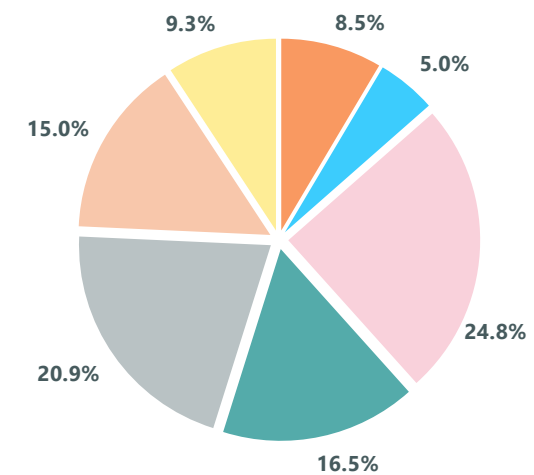
World fishmeal aquaculture usage ('000 mt)



Use of fishmeal in aquaculture by species in 2019



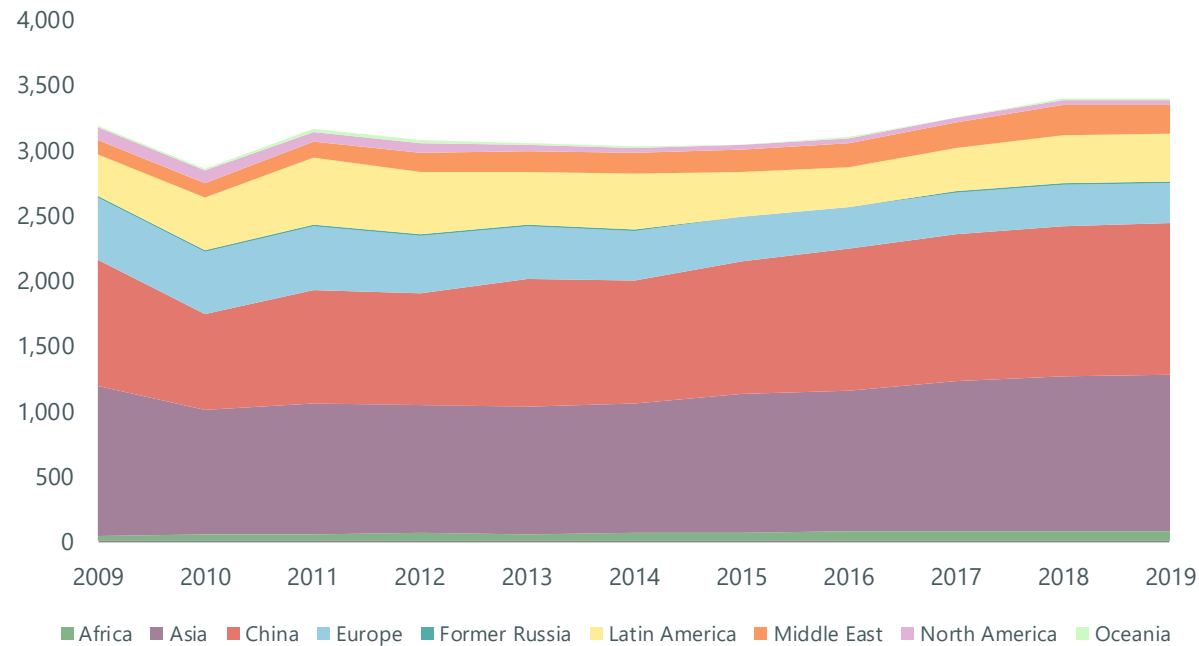
Use of fishmeal in aquaculture by species in 2018



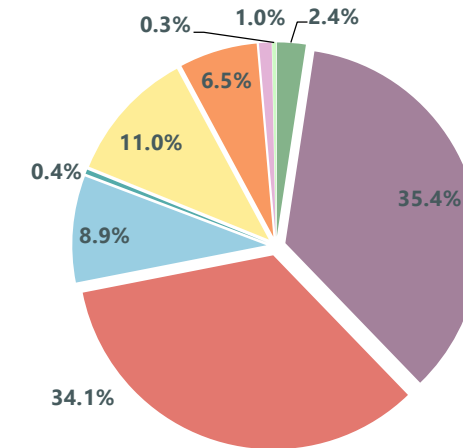


Use of fishmeal in aquaculture per region

Fishmeal use in aquaculture by region ('000 mt)

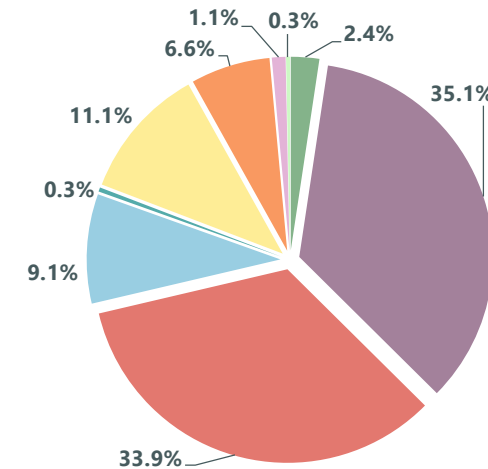


Use of fishmeal in aquaculture by region in 2019



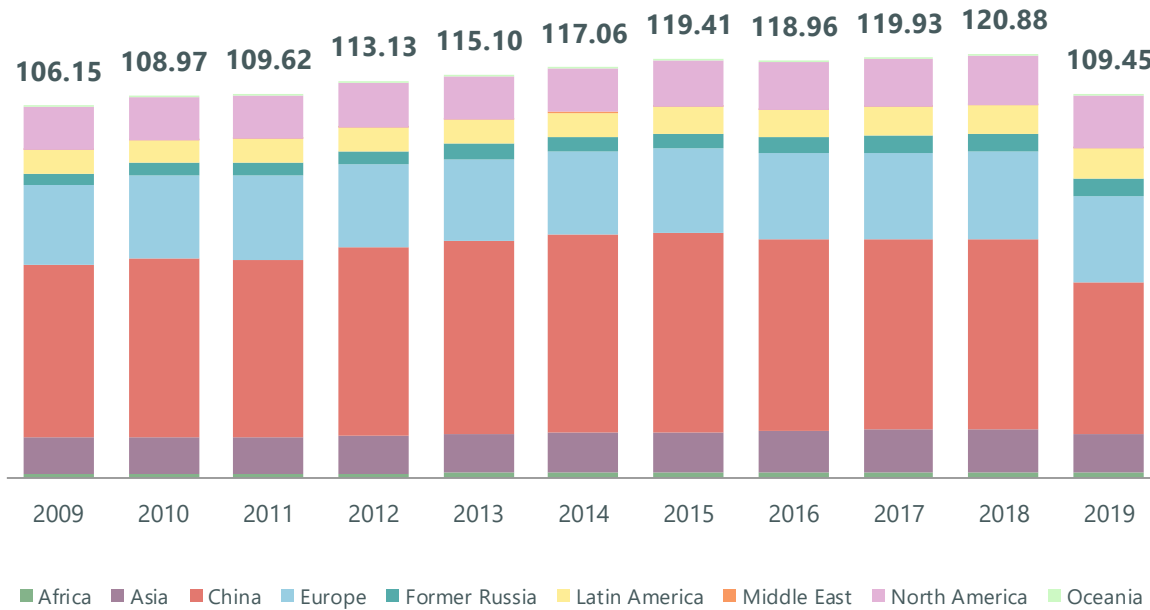
- Africa
- Asia
- China
- Europe
- Former Russia
- Latin America
- Middle East
- North America
- Oceania

Use of fishmeal in aquaculture by region in 2018

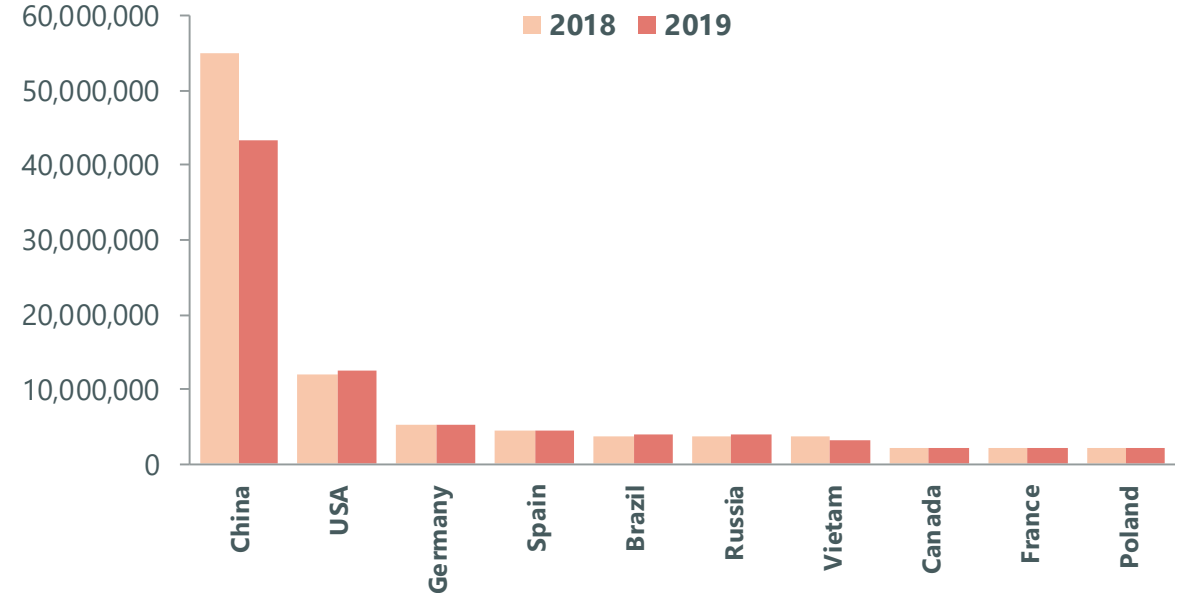


Pig meat production

World pig meat production (million mt)



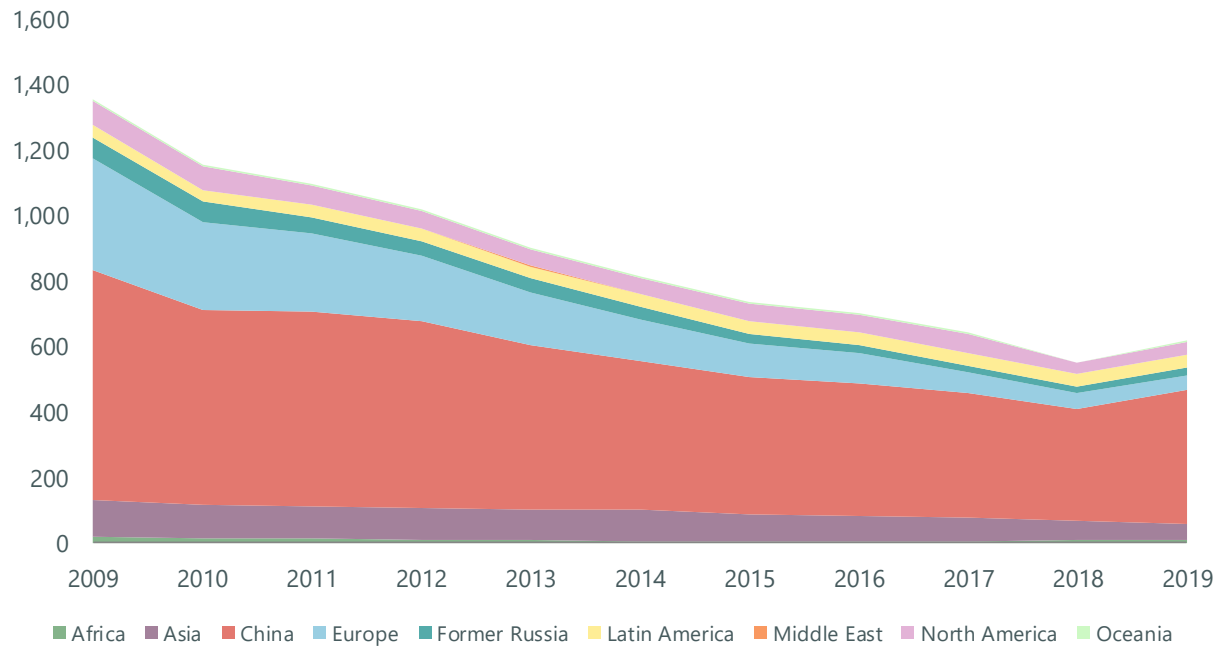
Pig meat production 2018-2019



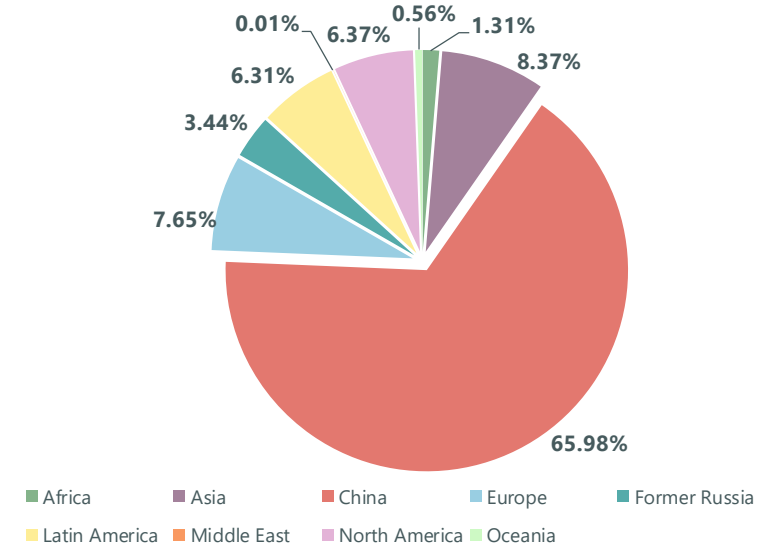


Use of fishmeal in pigs by region

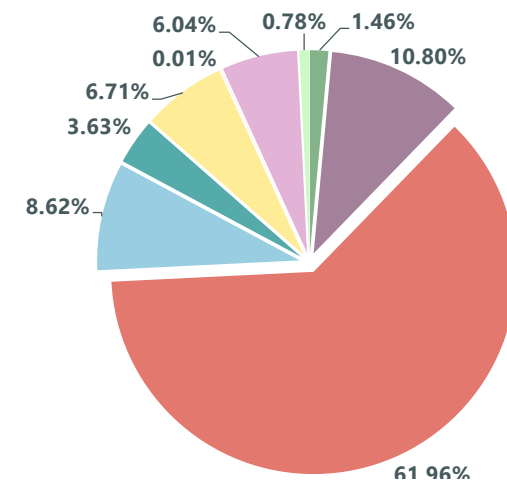
Use of fishmeal in pigs by region ('000 mt)



Use of fishmeal in pigs by region in 2019

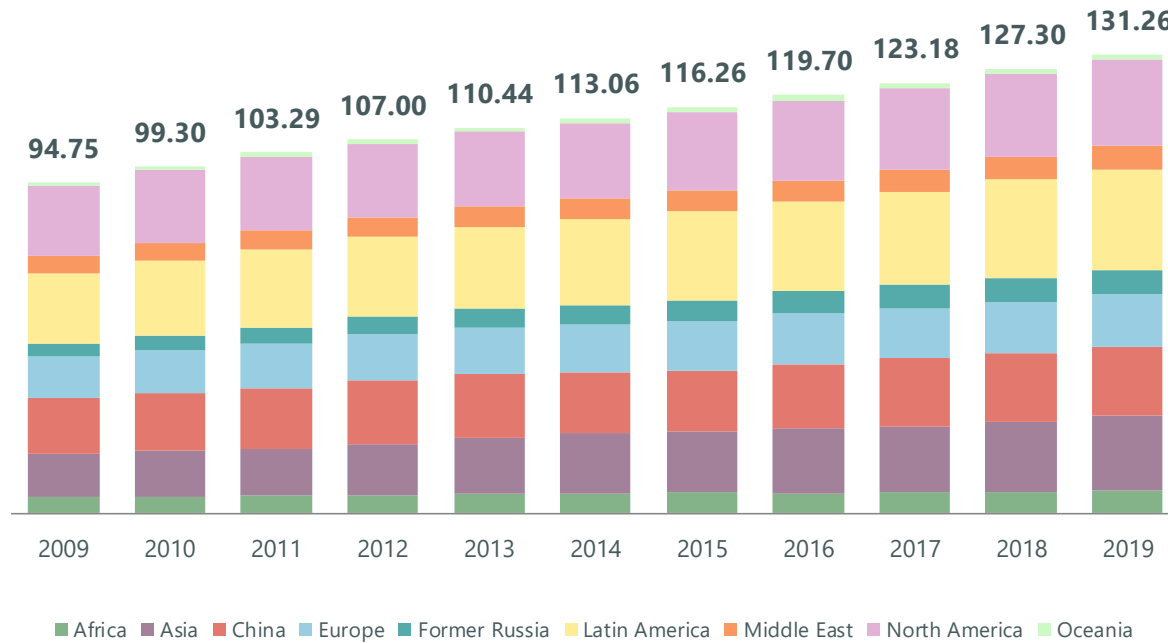


Use of fishmeal in pigs by region in 2018

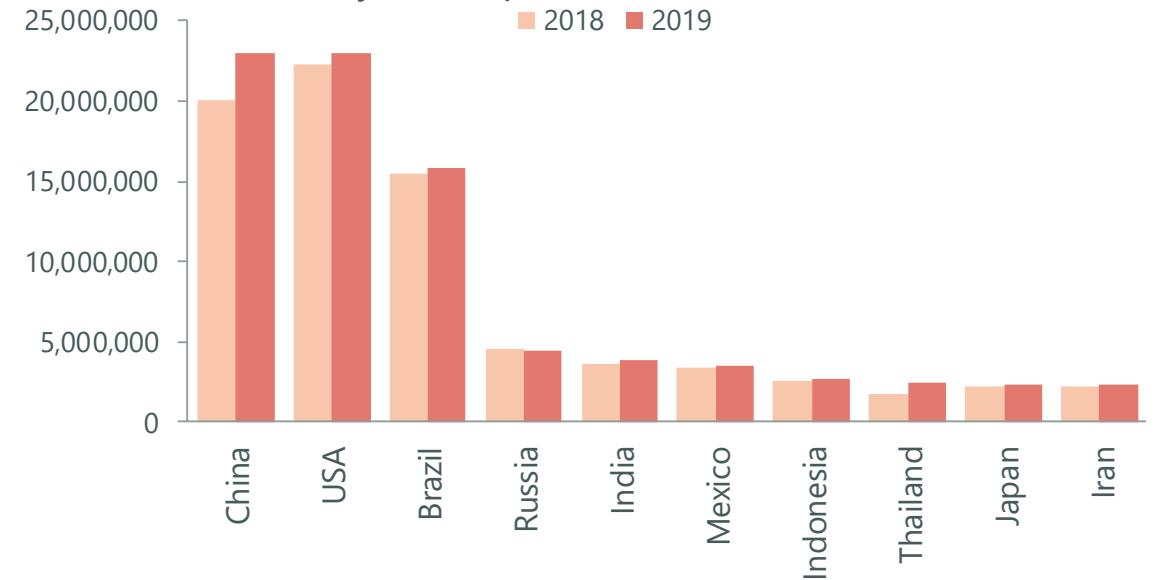


Poultry meat production

World poultry meat production (million mt)



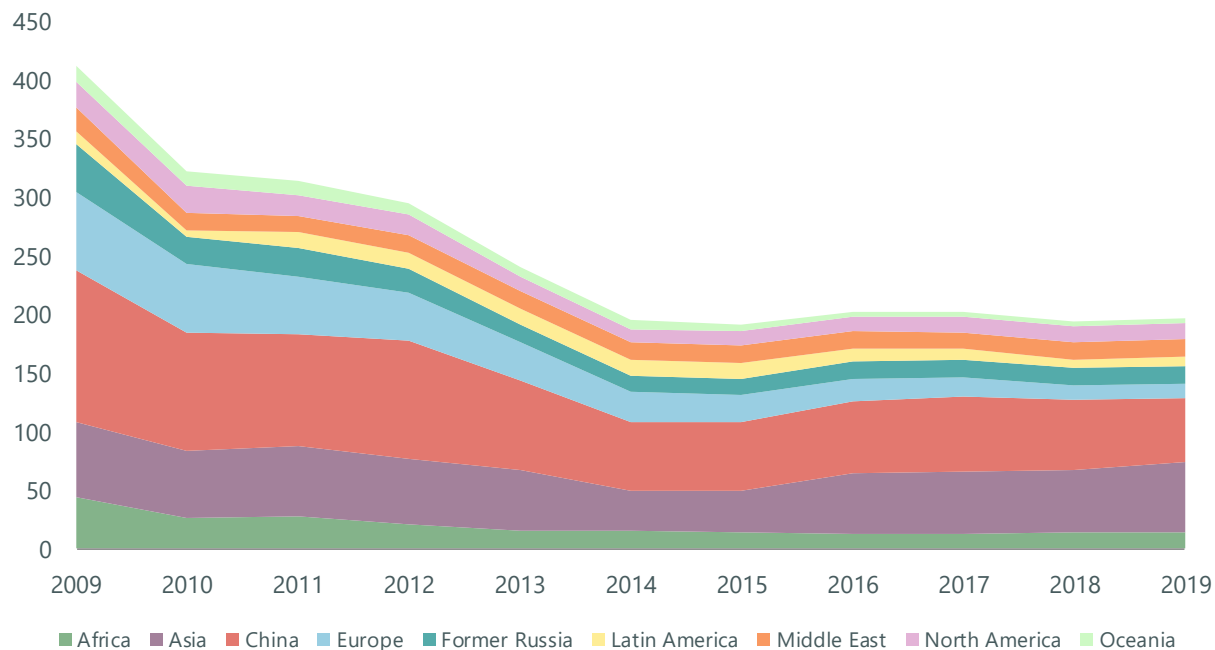
Poultry meat production 2018-2019



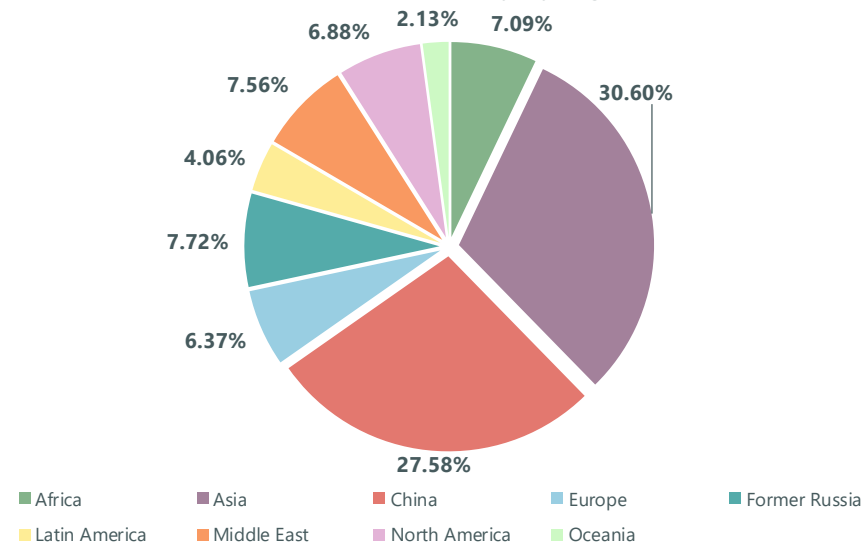


Use of fishmeal in poultry by region

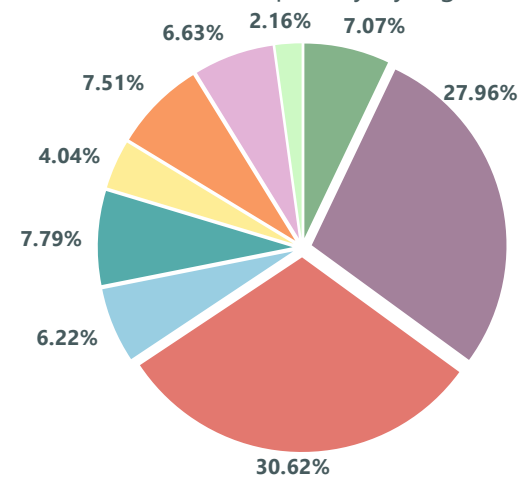
Use of fishmeal in poultry by region ('000 mt)



Use of fishmeal in poultry by region in 2019



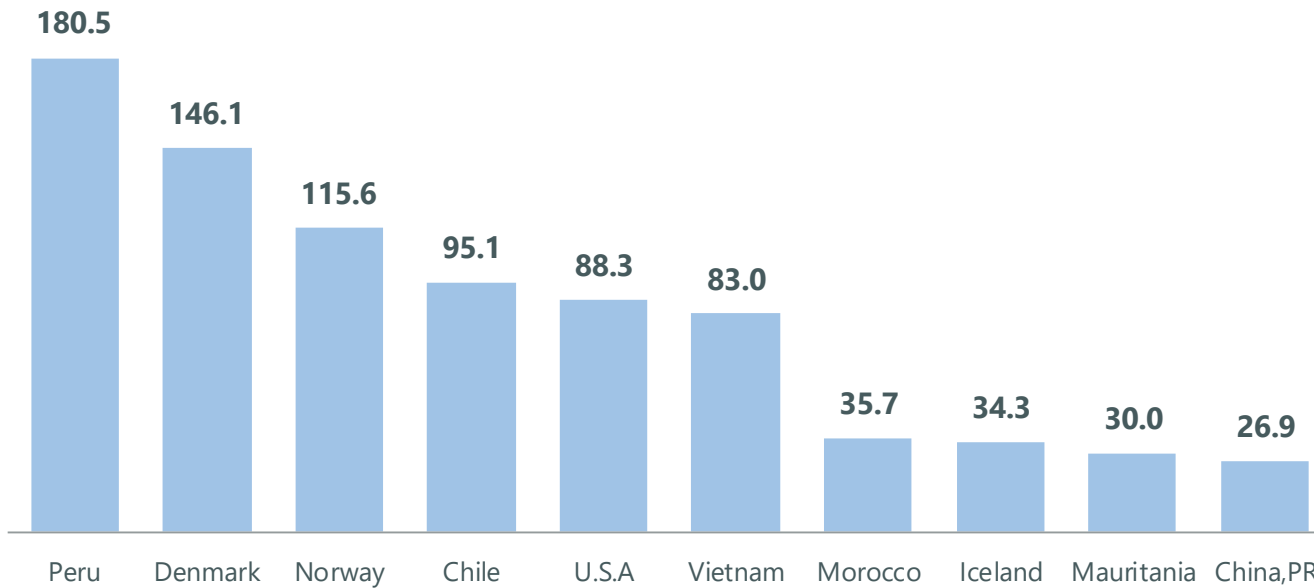
Use of fishmeal in poultry by region in 2018



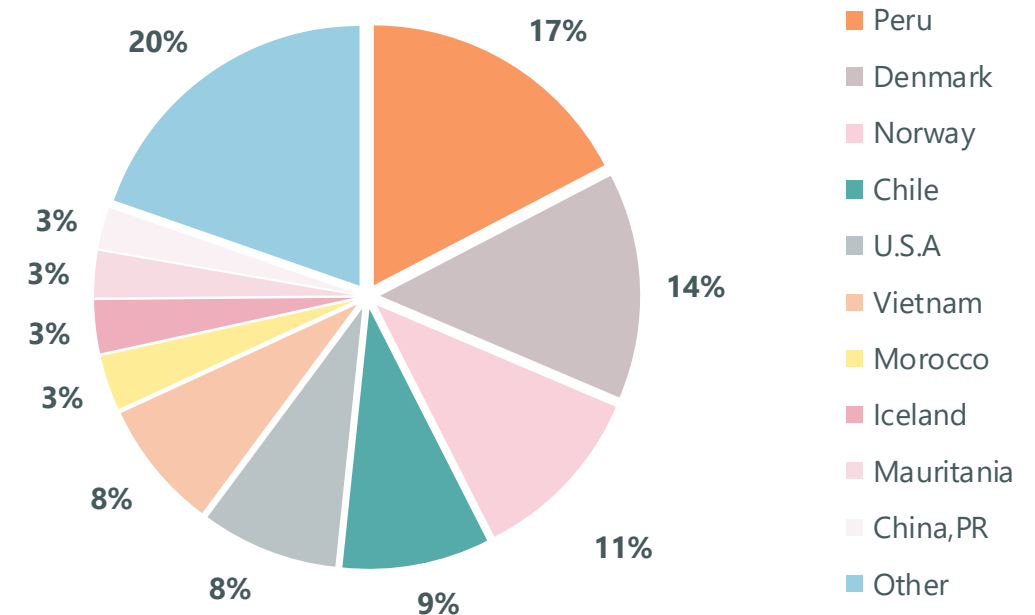


Fish oil exports

Fish oil export (000 mt) 2019



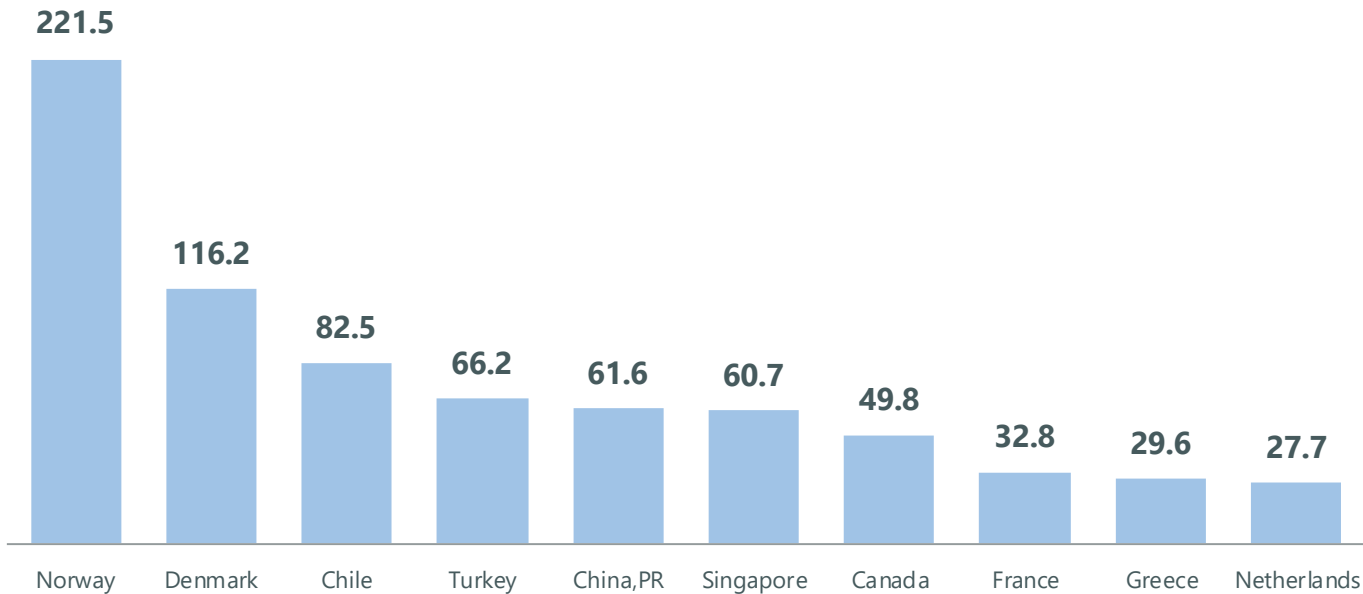
Fish oil export (%) 2019



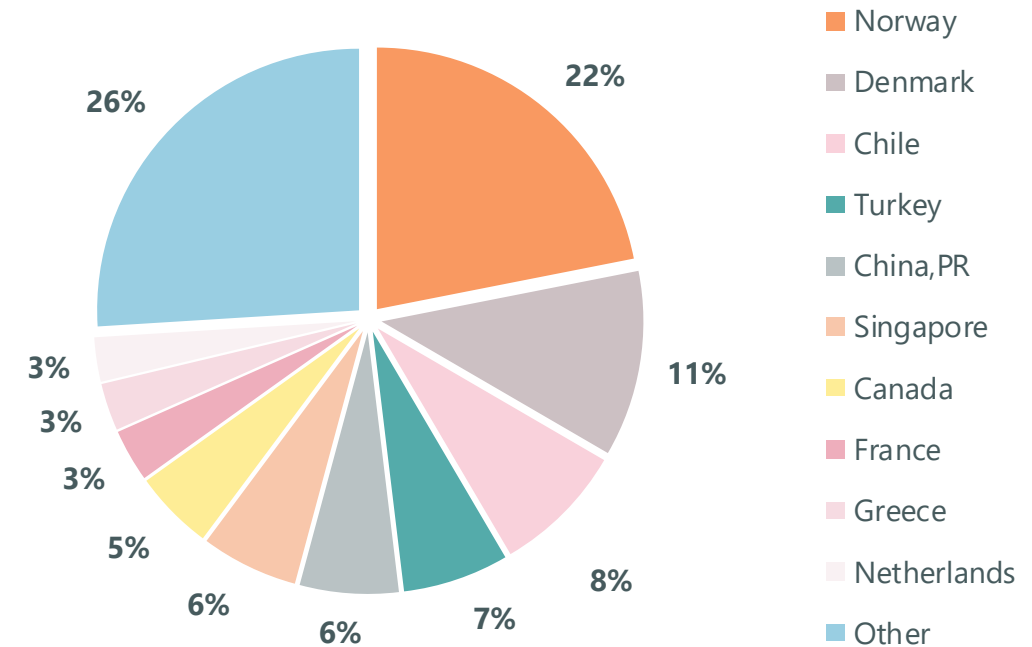


Fish oil imports

Fish oil import (000 mt) 2019

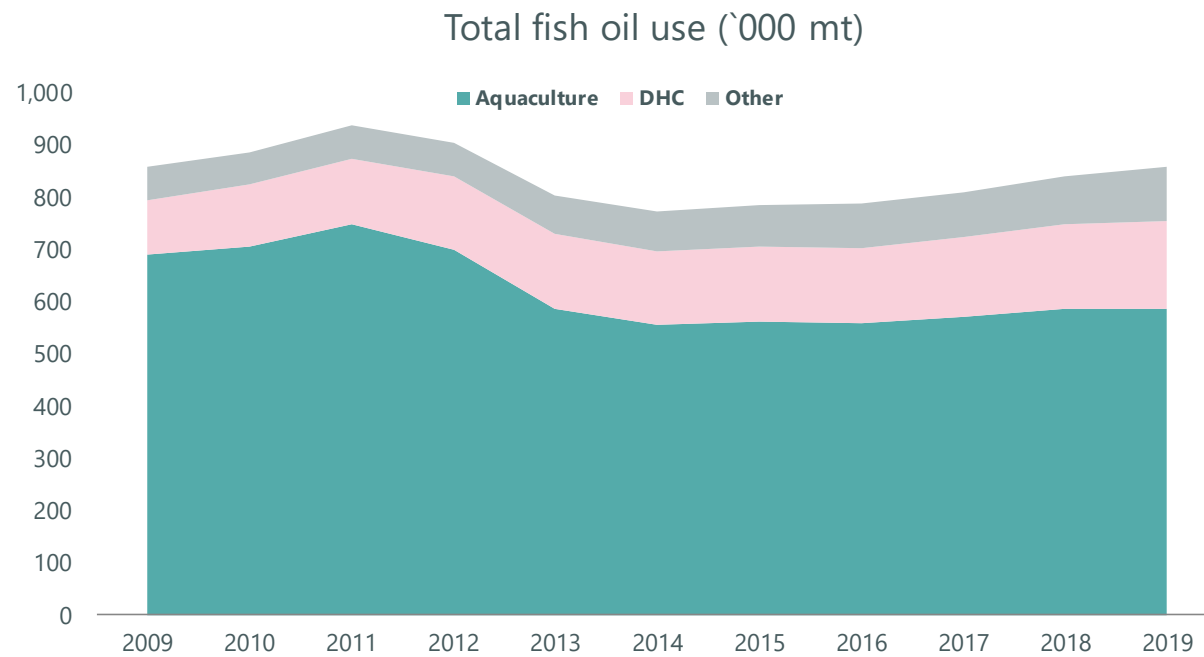


Fish oil import (%) 2019

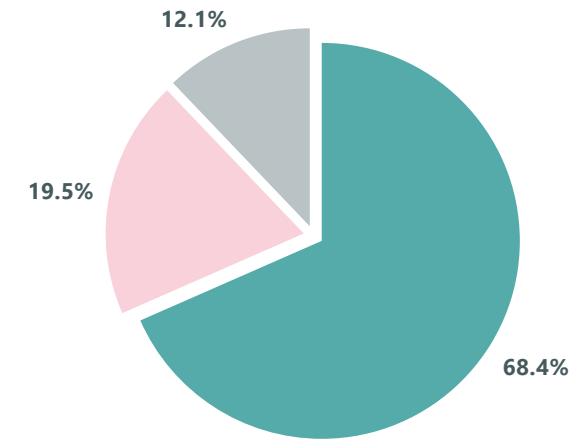




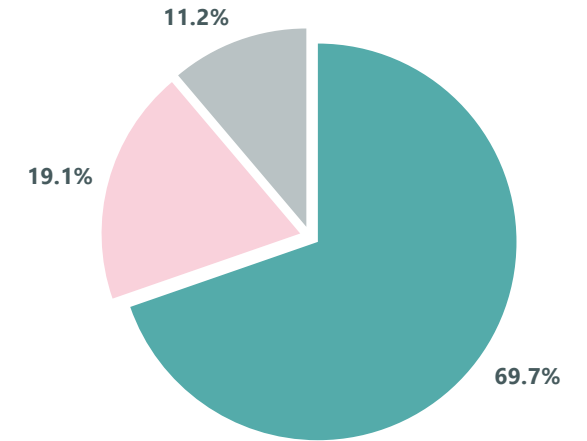
Total fish oil use



Use of fish oil by market in 2019



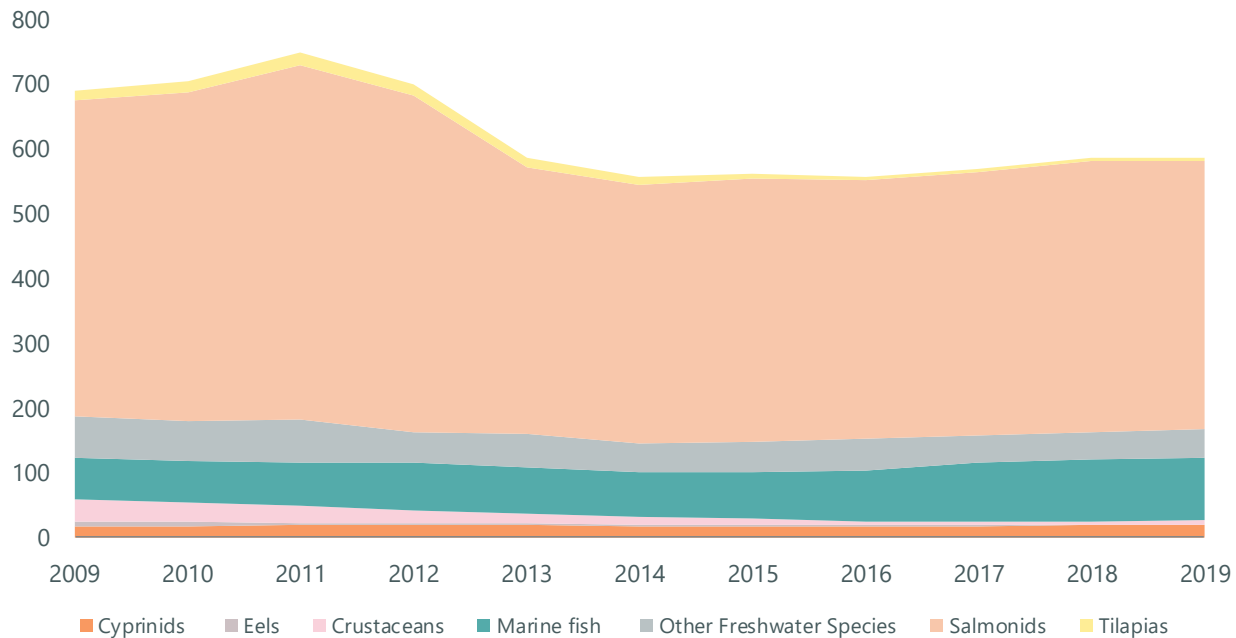
Use of fish oil by market in 2018



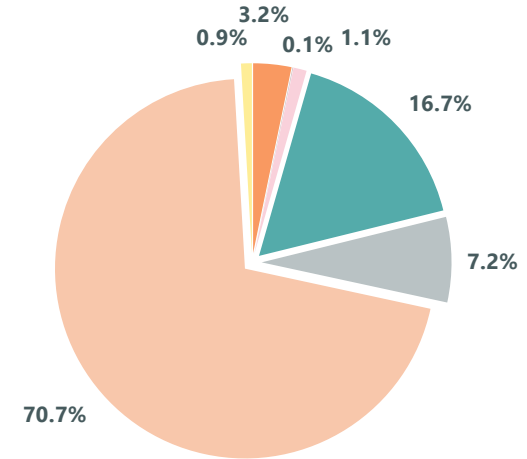


Use of fish oil in aquaculture by species

World fish oil aquaculture usage ('000 mt)

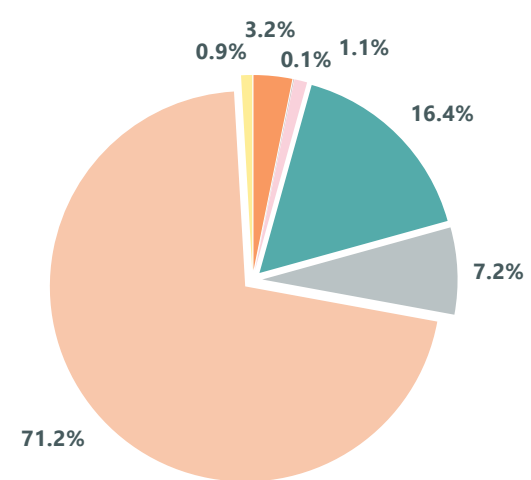


Use of fish oil in aquaculture by species in 2019



Cyprinids Eels Crustaceans Marine fish Other Freshwater Species Salmonids Tilapias

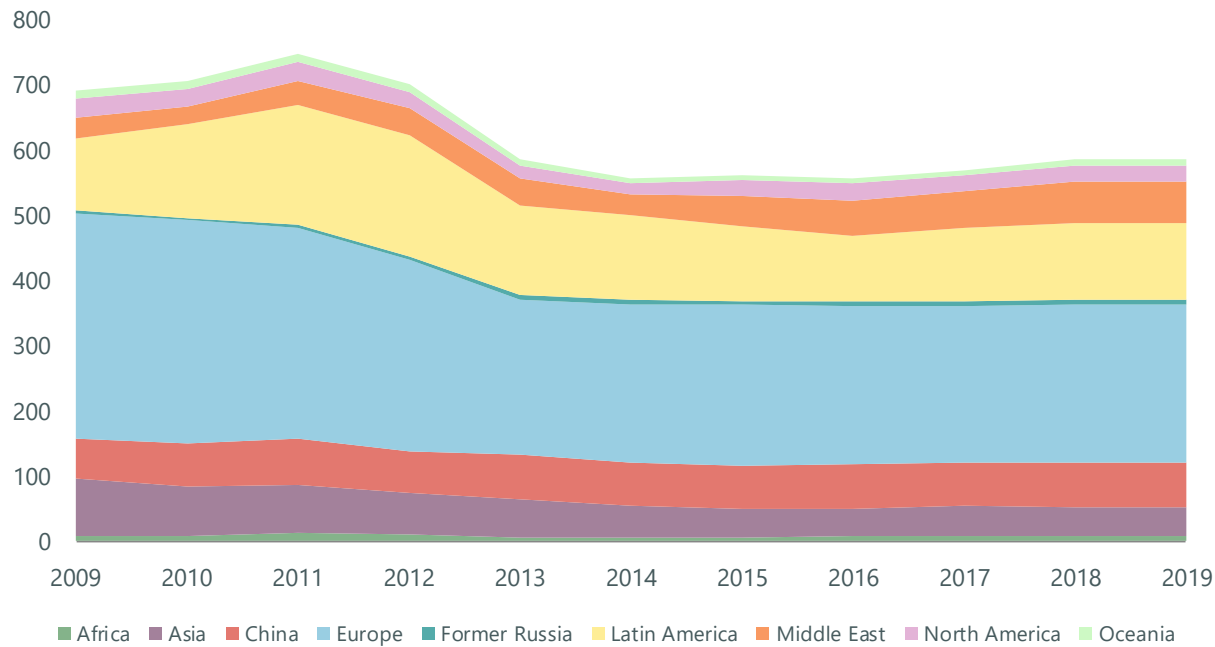
Use of fish oil in aquaculture by species in 2018



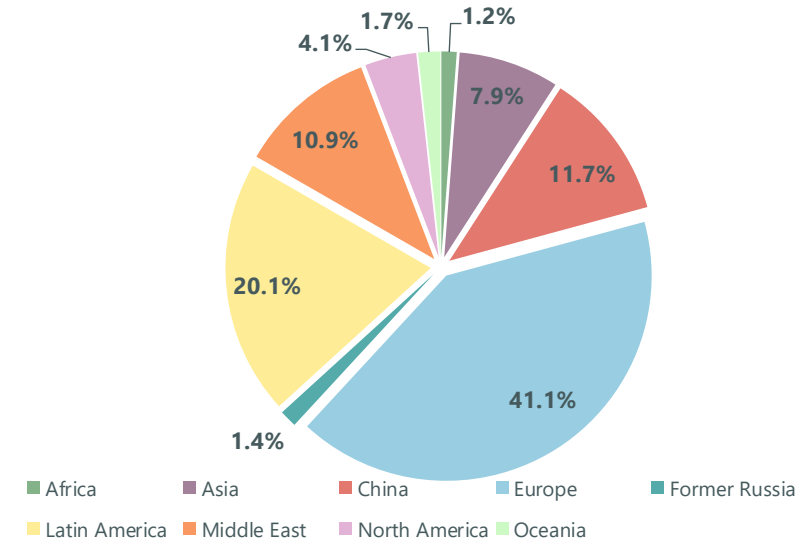


Use of fish oil in aquaculture by region

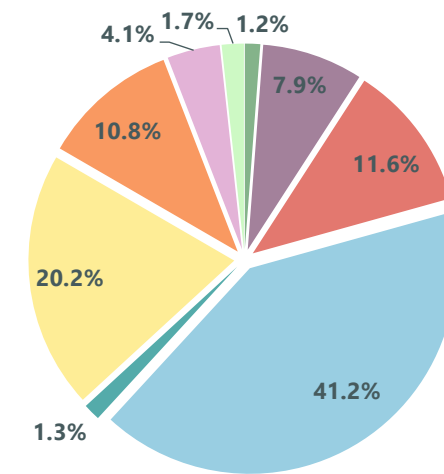
Fish oil use in aquaculture by region ('000 mt)



Use of fish oil in aquaculture by region in 2019 ('000 mt)



Use of fish oil in aquaculture by region in 2018 ('000 mt)



Summary

In 2019, Peru remained the main fishmeal&fish oil production and exporting country, while China (meal) and Norway (oil) the biggest importers;

In 2020 no changes expected.

Globally, in 2019 it was the aqua sector to consume the biggest share of both fishmeal (78%) and fish oil (68%);

In 2020 no changes expected other than bigger shares of pigs-/poultry-feed and pet food for fishmeal, and pet food for fish oil;

In 2019 Asia and China consumed almost 70% of the global fishmeal, mainly because of the aquaculture, although the the biggest growth rates came from poultry- and pig-feed (in China);

In 2020 pig-feed should increase its global share thanks to China.

In 2019 consumption of fish oil in aquaculture by regions was dominated by the role of the salmonids farming industry in Europe and Latin America;

In 2020 the salmonids' share might decrease due to lower inclusion rates in Europe.

The pharmaceutical sector maintained a limited growth rate in terms of fish oil intake in 2019, and it is not expected to do much better in 2020;

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Thanks for your attention

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