



IFFO

THE MARINE INGREDIENTS ORGANISATION

World Fishmeal Supply/Demand and Outlook for 2017

世界鱼粉供求变化新特征与2017年市场展望

Andrew Mallison

Director General IFFO

IFFO秘书长

24th March 2017

2017年3月24日

Agenda. 主要内容



Part 1 第一部分

- Global production 2016
2016年全球产量
- Forecast for 2017
2017年预测

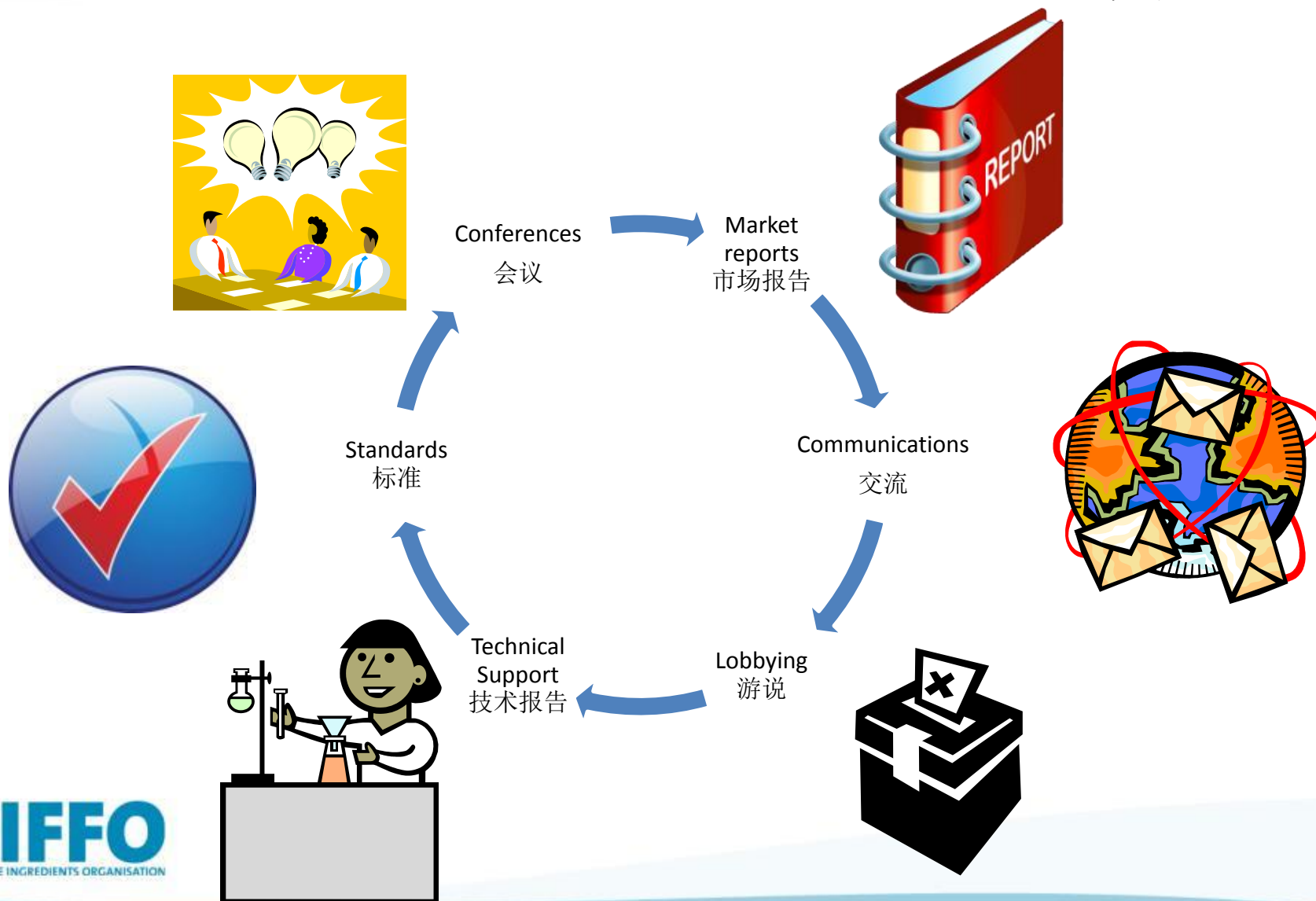
Part 2 第二部分

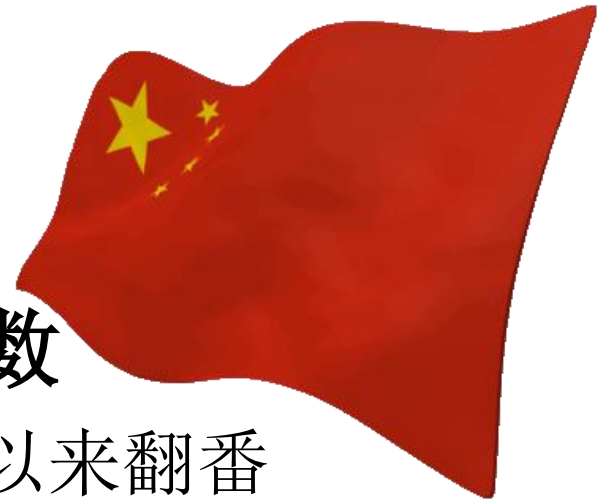
- Industry trends 行业趋势

Who are we? IFFO简介

- An international trade association representing companies in the global marine ingredients sector.
全球贸易协会，代表全球海洋原料领域的公司
- Sector value ca. US\$9.5bn 行业总值在95亿美元
- Approx 80% of sector traded value within IFFO membership 业内交易额中约80%为IFFO会员

What do we do? 我们的业务





Membership in China 中国会员数

- Doubled since 2016 2016年以来翻番
- Now 21 companies, including Coland, Grobest and Guangdong Haid. 目前有21家公司，包括高龙，全兴和广东海大
- Increasing contact with international markets through JV's (e.g. Biomar / Tongwei). 通过合资企业（比如通威/ Biomar)与国际市场交流增强)



IFFO

THE MARINE INGREDIENTS ORGANISATION

IFFO

IFFO是全球知名的国际非营利机构，代表全球鱼粉鱼油等海洋原料行业并致力于对该行业的宣传工作。我们经常作为行业代表定期出席国际会议，且在联合国粮食和农业组织（FAO）以及欧盟委员会和议会享有观察员身份。



关于 IFFO

海洋原料组织（IFFO）是代表并推广全球鱼粉、鱼油和海洋成分行业的国际非营利组织。

更多



会员登陆

请在此登录会员专区。如果您不是会员，想了解更多信息，请查看下方的会员服务板块。

登陆

最新消息



IFFO回应HUFFINGTON博文“我们能否继续养殖鲑鱼？”

对Huffington博文的回应：Sue Cross在2017年2月10日发表了名为“我们能否继续养殖鲑鱼”的博文 IFFO是全球鱼粉和鱼油行业的海洋原料组织。...



IFFO对SALT杂志中所发表的文章做出回应

SALT杂志上发表了一篇名为“我们用于加工鱼粉的鱼类中有90%可供人类食用”的文章。该文章发表后，IFFO的Andrew做出如下回应：您发表了一篇有关人类直接食用...

www.iffo.net

What happened in 发生了什么？



Supply 供应端



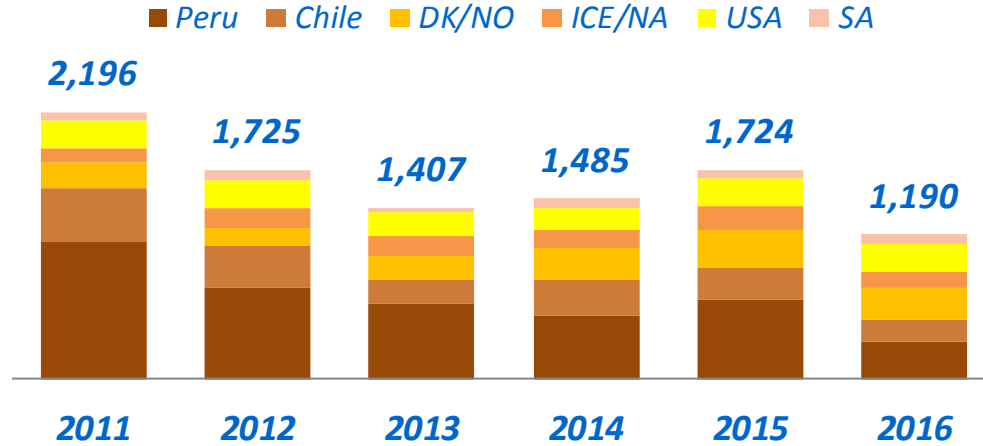
I-III quarters 2016: Total IFFO countries

2016年前三季度：IFFO纳入统计的所有国家

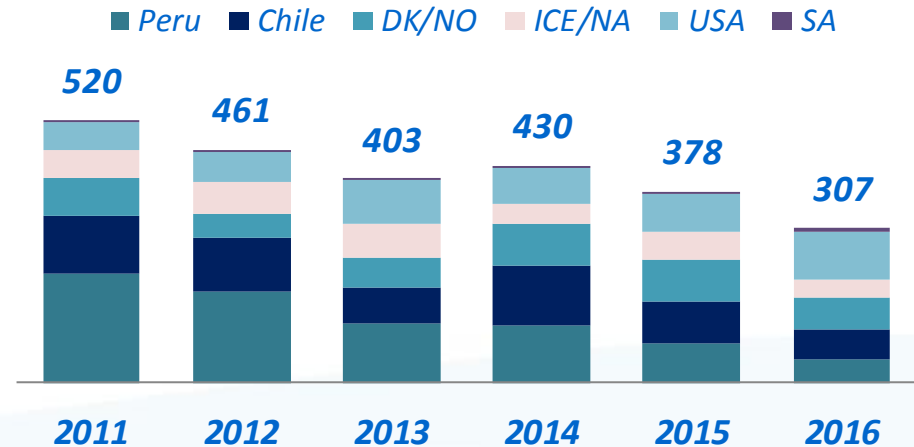
The first 3 quarters of 2016 showed the lowest level of production for many years.

Peru and Chile reduced catch is the main reason for such poor performance, but Europe's lower quotas were also to be blamed.

Total fishmeal I-III quarters (000 mt)



Total fish oil I-III quarters (000 mt)



2016年前三季度鱼粉产量为多年来的最低，秘鲁和智利下降为主因，但欧洲配额也下降了。



IV quarter 2016: Peru

2016年第四季度

Although there was no concern about a closure of the fishing activities in the North/Centre area as in 2014, over the year the expectations on what quota the government could grant in the last quarter went on a roller coaster ride.

In the end a quota of 2 million mt was granted, leading to a catch of around 1.4 million mt of anchovy by the end of December.

January 2016
2016年1月: 250万
2.5 million mt

July 2016
2016年7月: 200万
2 million mt

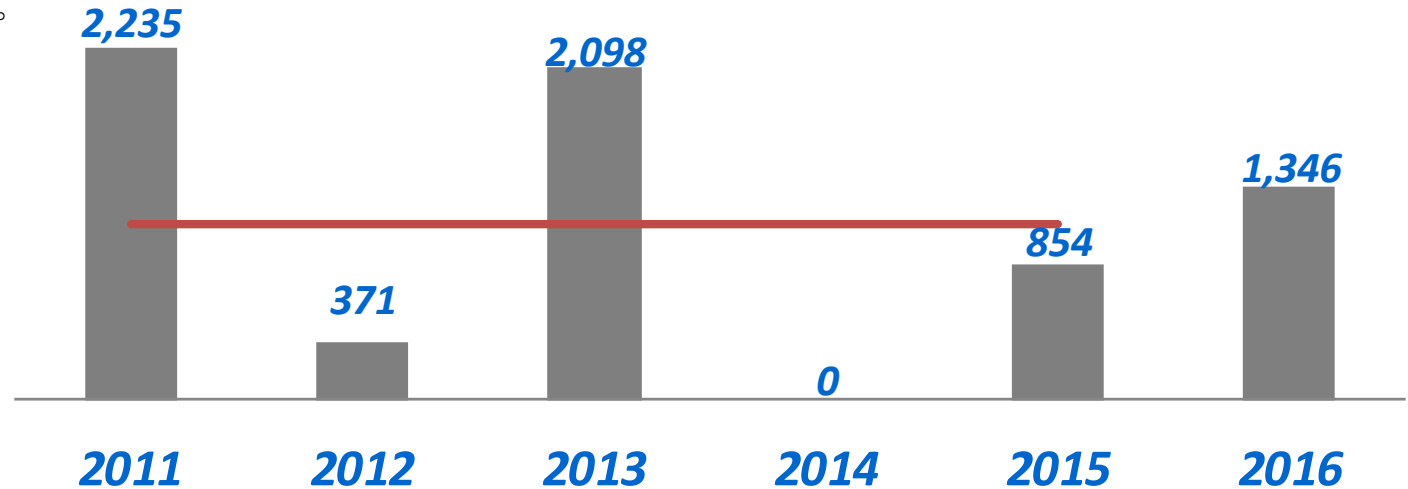
October 2016
2016年10月: 150万
1.5 million mt

November 2016
2016年11月: 200万
2 million mt

虽然目前不存在会出现类似于2014年关闭捕季的担忧,但这些年来关于配额的预期都犹如过山车一样急转突变。

Raw material IV quarter (000 mt)

— average 2011-2015



去年下半年最终给了200万吨配额,结果到12月底捕捞了约140万吨鳀鱼。

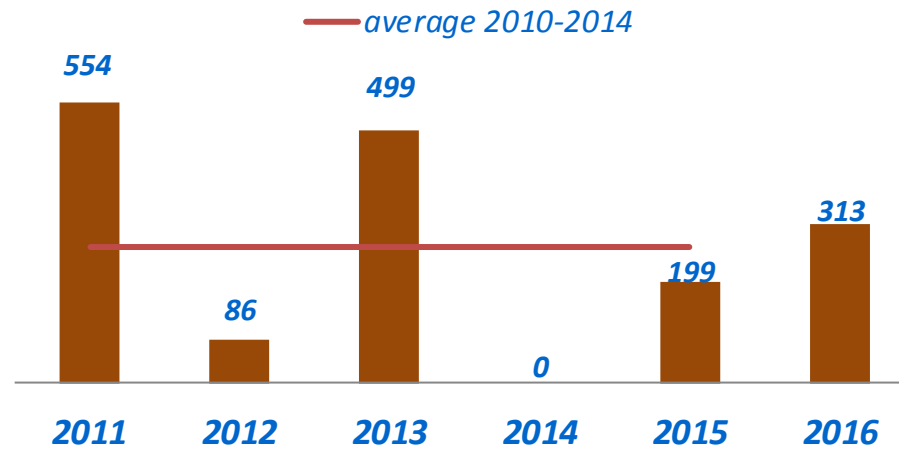


As a result, fishmeal production for the year 2016 was the third highest tonnage since 2010.

Similarly, fish oil yields, affected by the El Niño effect on the ocean waters that led to leaner anchovies, kept down fish oil production.

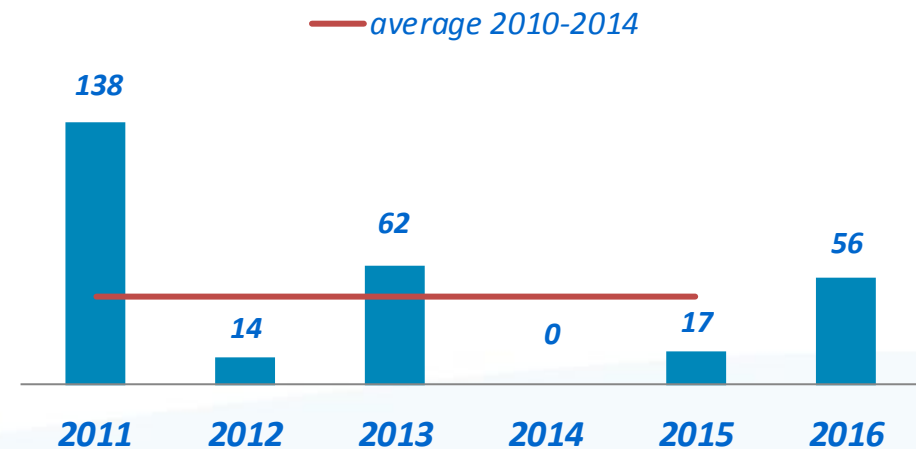
Yet, fish oil yields in Q IV-2016 were reported at an average of 4% vs 1.5% in Q IV-2015

Fishmeal IV quarter (000 mt)



2016年鱼粉产量是自2010年来第三高的。

Fish oil IV quarter (000 mt)



IV quarter 2016: Total IFFO countries

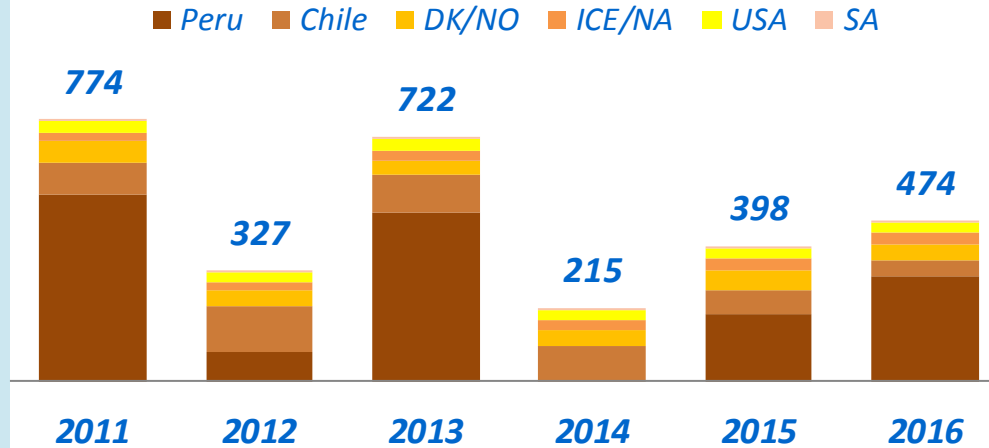
Chile entered the final quarter of 2016 with 60% of the northern quota of anchovy and sardine still to be caught.

Similarly in Europe, Denmark had 30% of the sprat and 65% of the sand eel quotas still to land, whereas in Norway 50% of the spring spawning herring remained at sea.

In the end very little was landed in Chile, while Europe had better-than-expected landings in Q IV.

2011年来第四季度鱼粉总产量 Total fishmeal IV quarters (000 mt)

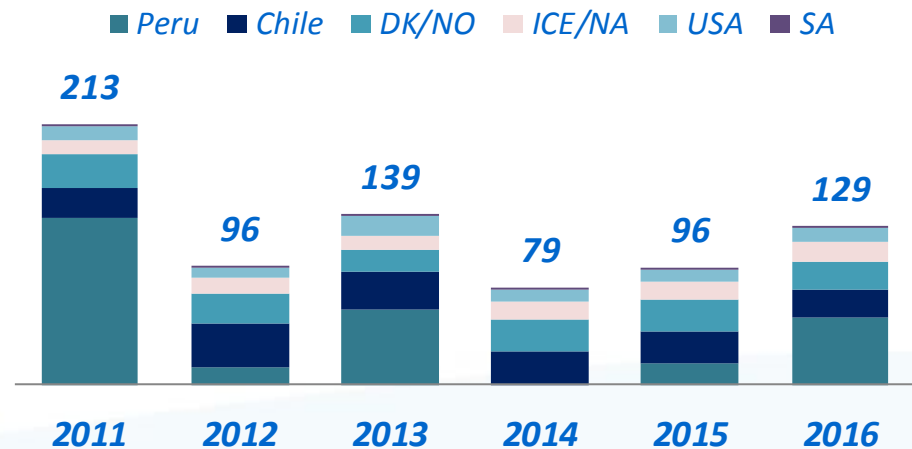
2016年第四季度



进入2016年四季度时，智利北部仍有60%的鳀鱼和沙丁鱼配额待完成。欧洲市场上，丹麦约30%的sprat配额和65%的沙曼配额待完成，挪威50%的鳕鱼配额未完成。

最后，智利捕获量有限，但欧洲好于预期。

Total fish oil IV quarters (000 mt)

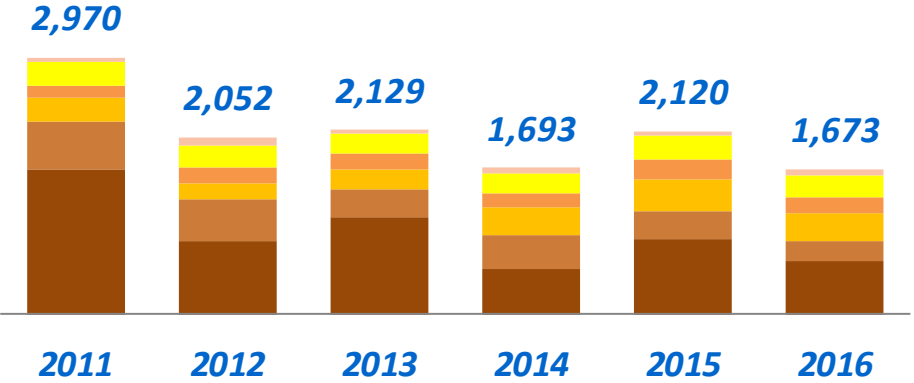


Year 2016: Total IFFO countries

2016年IFFO统计国家

Total fish meal (000 mt) 鱼粉总产量

■ Peru ■ Chile ■ DK/NO ■ ICE/NO ■ USA ■ SA



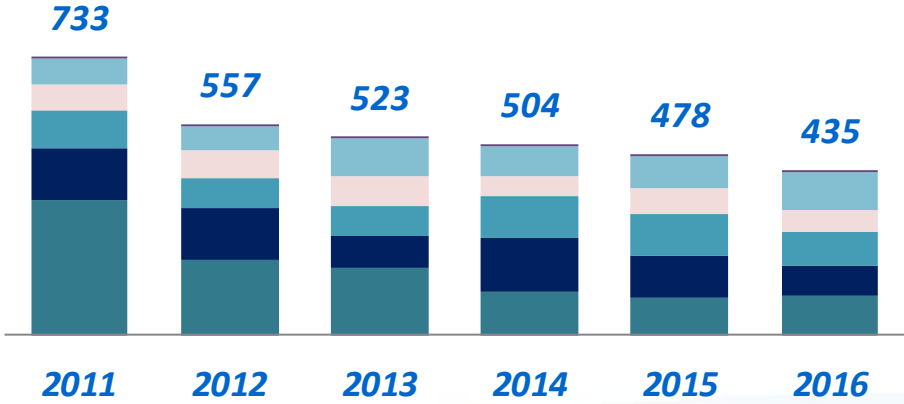
2016 has produced the lowest fishmeal tonnage on records for the so-called IFFO countries, on the back of the lower-than-average landings in Peru and Chile.

由于秘鲁和智利渔获量低于均值，2016年鱼粉产量创记录新低。

Same outcome in terms of fish oil, with the lowest overall production ever reported since records began in 1976.

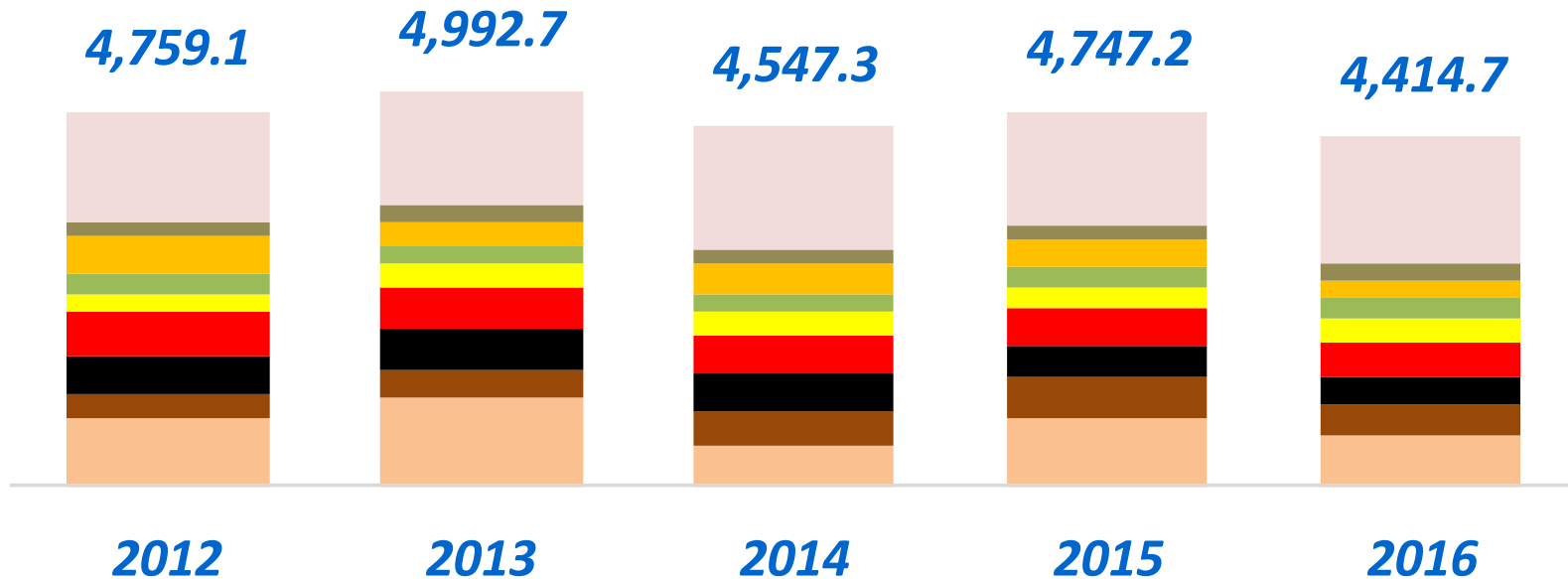
Total fish oil (000 mt)

■ Peru ■ Chile ■ DK/NO ■ ICE/NO ■ USA ■ SA



2016年全球鱼粉产量 Fishmeal world production ('000 mt)

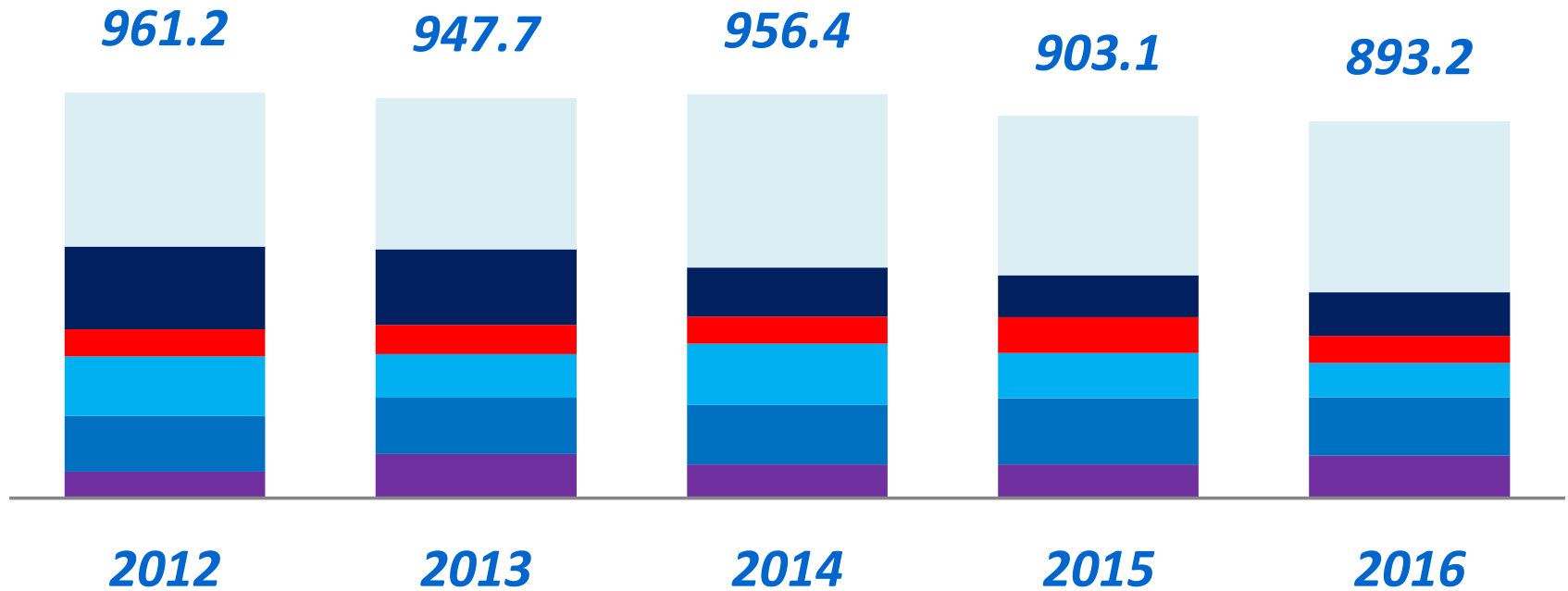
- Peru
- China,PR
- Chile
- Scandinavia*
- Vietnam
- Japan
- Thailand
- U.S.A
- Others



2016年全球鱼油产量

Fish oil world production ('000 mt)

■ U.S.A ■ Scandinavia* ■ Chile ■ China,PR ■ Peru ■ Other

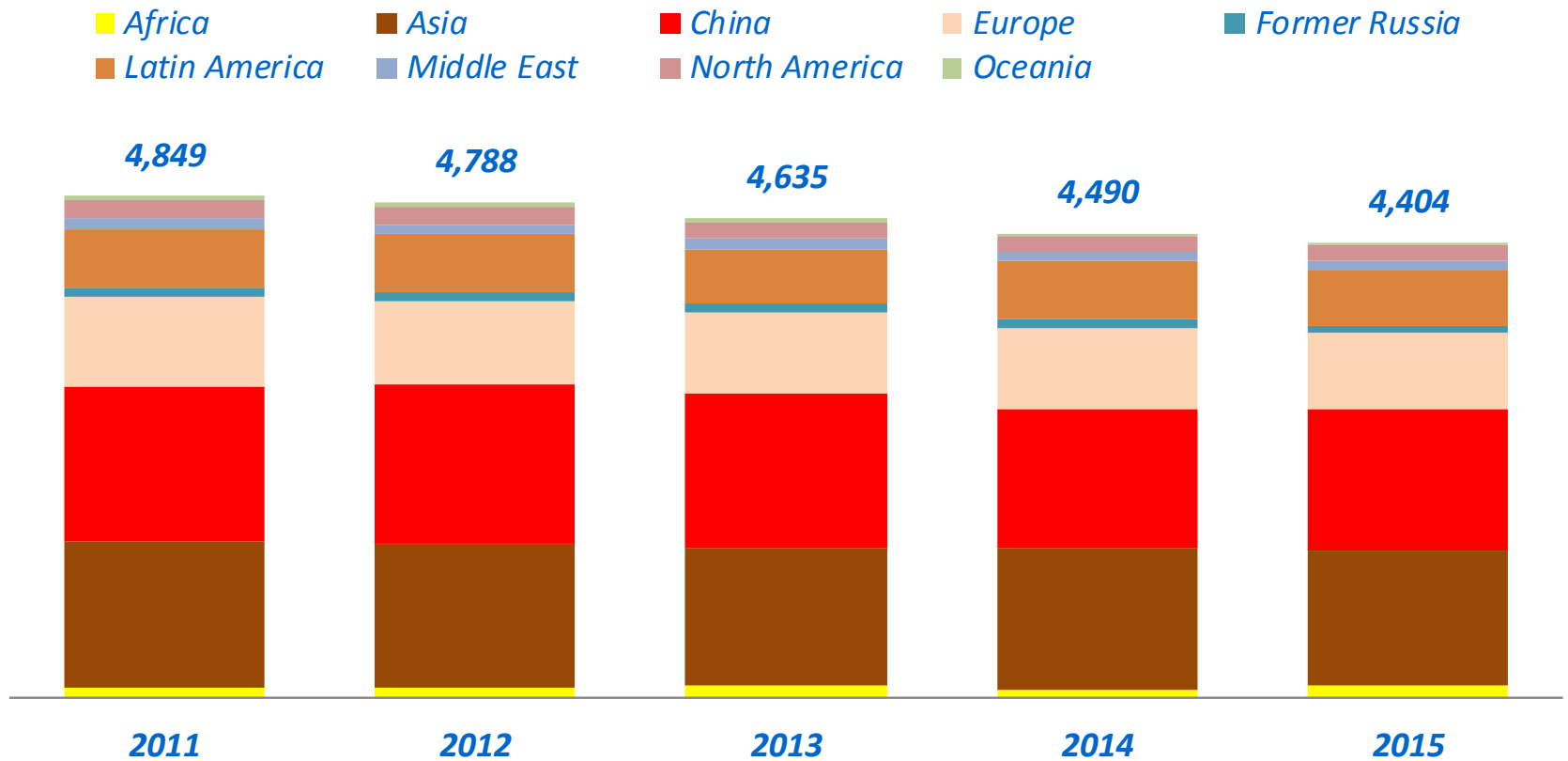


Demand 需求端



全球鱼粉表观消费 World Fishmeal Apparent Disappearance (*'000 mt*)

消费趋势

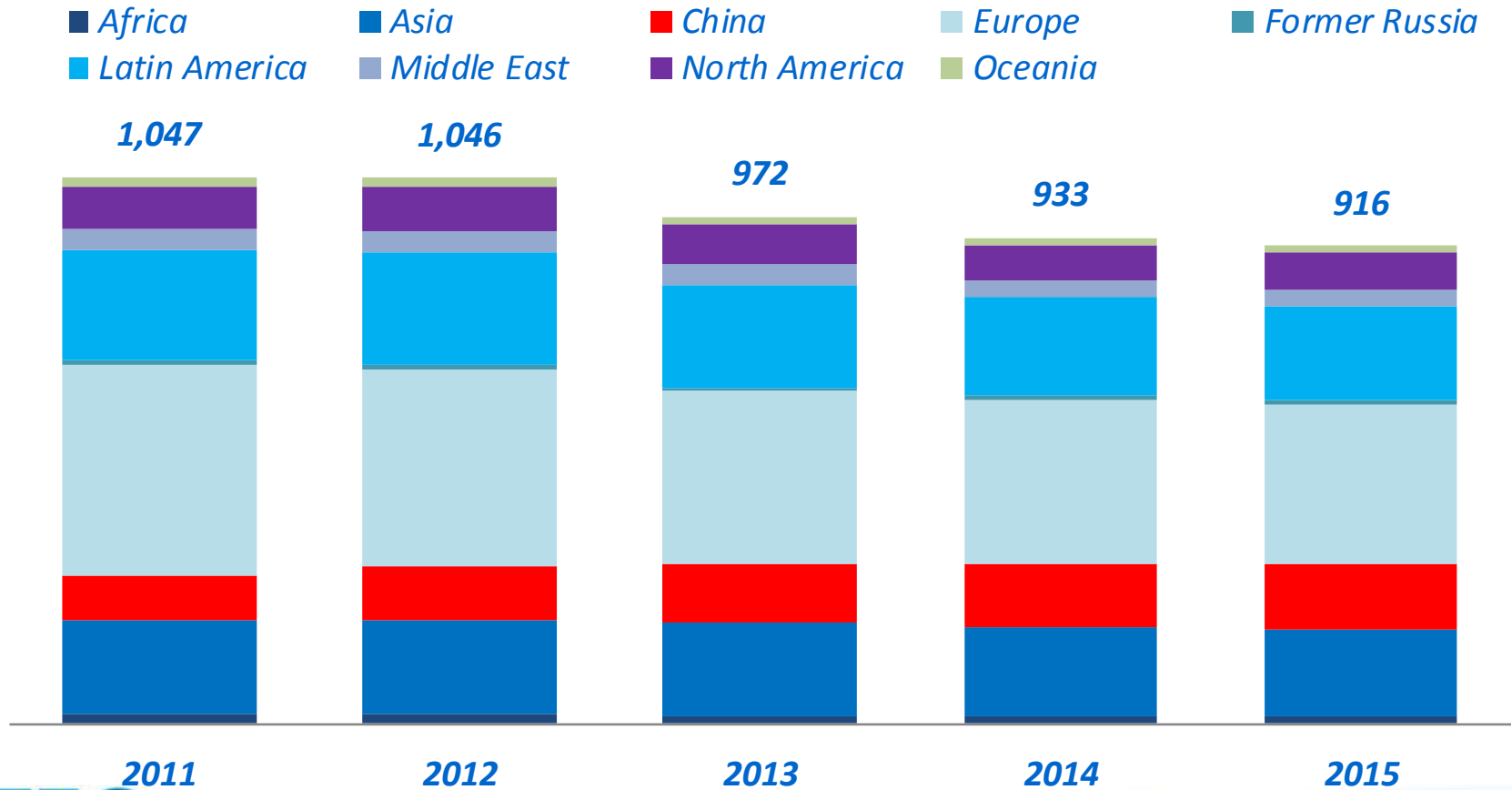


全球鱼油表观消费

Consumption trends

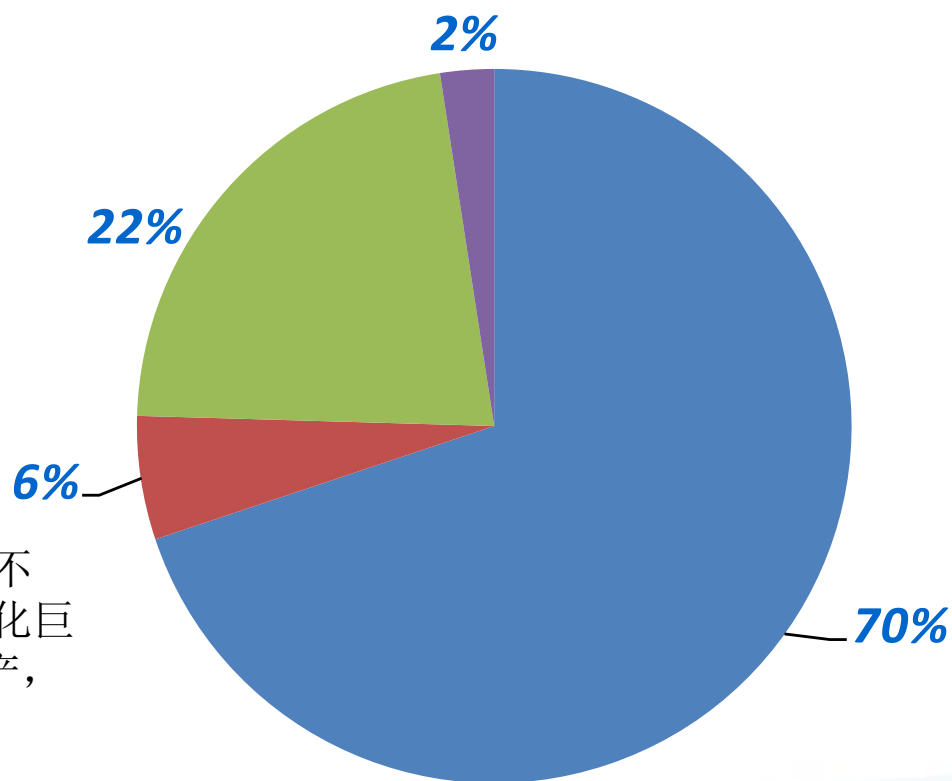
World Fish oil Apparent Disappearance (^{'000} mt)

消费趋势



Use of Fishmeal by Market in 2015

■ Aquaculture 水产 ■ Chicken 鸡 ■ Pig 猪 ■ Other 其它



No change in the usage breakdown with respect to the year 2015.

On the contrary, the comparison with the year 2005 is dramatic. Back then 30% was consumed by the pig sector, 14% by the poultry industry and only 64% by the aqua farmers.

与2015年相比，消费结构变化不大。但是，与2005年相比则变化巨大，2005年时，仅64%用于水产，14%用于家禽，30%用于生猪。

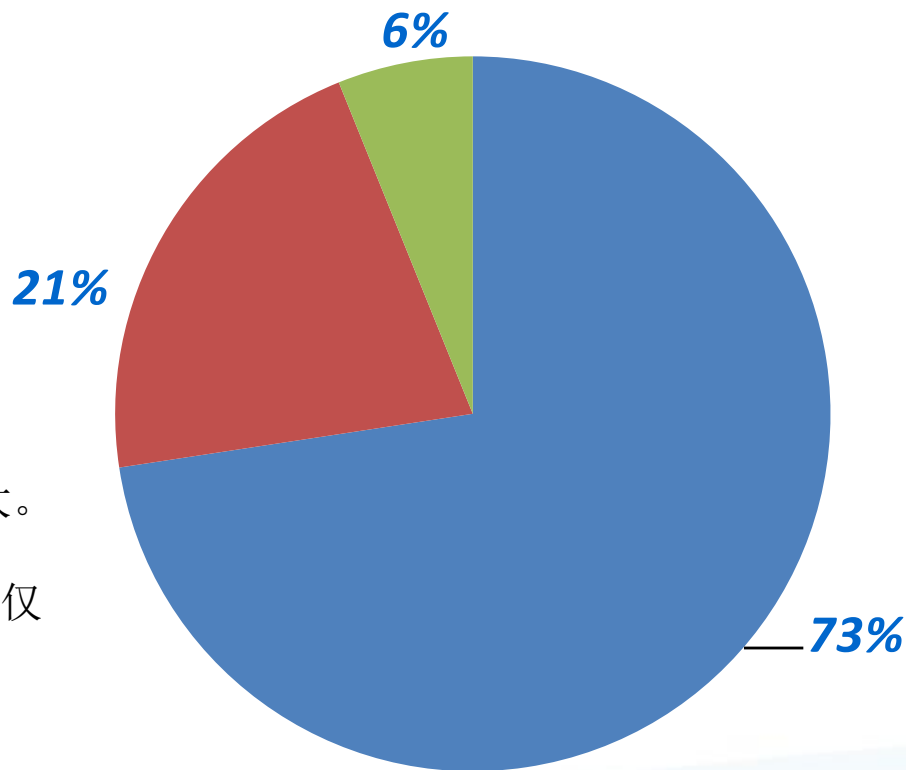
Use of Fish oil by Market in 2015

■ **Aquaculture** ■ **Direct Human Consumption** ■ **Other**
水产 人类直接消费 其它

No change in the usage breakdown with respect to the year 2015 for fish oil either.

However, back in 2005 86% of the fish oil was consumed in aquaculture and just 8% for direct human consumption.

与2015年相比，消费结构变化不大。但是，与2005年相比则变化巨大，2005年时，86%的鱼油用于水产，仅8%用于人类直接消费。



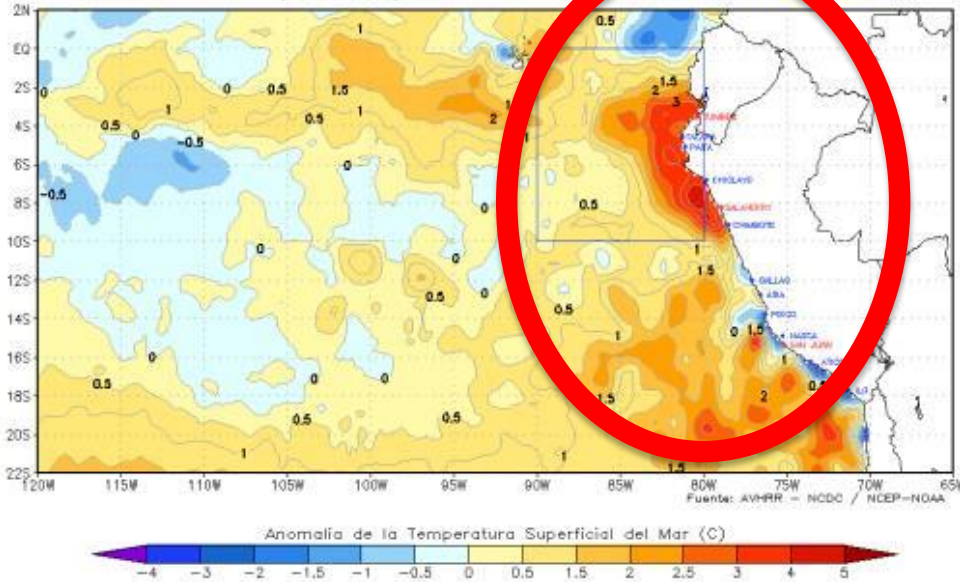
Projections for 2017年预测

2017



DIRECCION DE HIDROGRAFIA Y NAVEGACION
DPTO OCEANOGRAFIA - DIV METEOROLOGIA

Anomalia de la Temperatura Superficial del Mar (C) Promedio Dia: 07 MAR 2017



COMITÉ MULTISECTORIAL ENCARGADO DEL ESTUDIO NACIONAL DEL FENÓMENO EL NIÑO (ENFEN)

COMUNICADO OFICIAL ENFEN N° 05- 2017

Estado del sistema de alerta: **Alerta de El Niño Costero¹**

El Comité Multisectorial ENFEN prevé la continuación del evento El Niño costero al menos hasta el mes de abril inclusive, con una magnitud entre débil y moderada, asociado a una alta probabilidad de lluvias muy fuertes en las zonas medias y bajas principalmente en Tumbes, Piura y Lambayeque, aunque su ocurrencia dependerá de las condiciones atmosféricas locales.

Por lo tanto, el Comité Multisectorial ENFEN mantiene el estado de "Alerta de El Niño Costero", durante el cual mantendrá un monitoreo intenso de las condiciones, actualizando las perspectivas en frecuencia quincenal.

En el océano Pacífico ecuatorial occidental y central las condiciones térmicas se presentan entre normal a ligeramente frías, con anomalías de temperatura de -1°C a +0.5°C, mientras que en el Pacífico ecuatorial oriental, al Este de los 120° W las condiciones se mantienen cálidas con anomalías positivas de hasta 2 °C. La temperatura absoluta en la región occidental varía de 27 °C a 30 °C, en la central de 26°C a 27 °C, y en la región oriental de 26 °C a 29 °C.

Por el lado oriental, en la región Niño 1+2 las condiciones térmicas continúan incrementándose presentando condiciones más cálidas, sobre todo en áreas adyacentes a las costas de Ecuador y Perú, con temperaturas entre 27 °C y 30 °C, y anomalías positivas hasta 4°C.

Por otro lado, en el mar peruano la temperatura superficial en el norte varía entre 27 °C y 30 °C, mientras que en el centro y sur entre 23 °C y 27 °C. Estas temperaturas manifiesta condiciones cálidas en todo el mar peruano, pero con mayor intensidad en el norte, donde las anomalías alcanzan en promedio 4 °C.



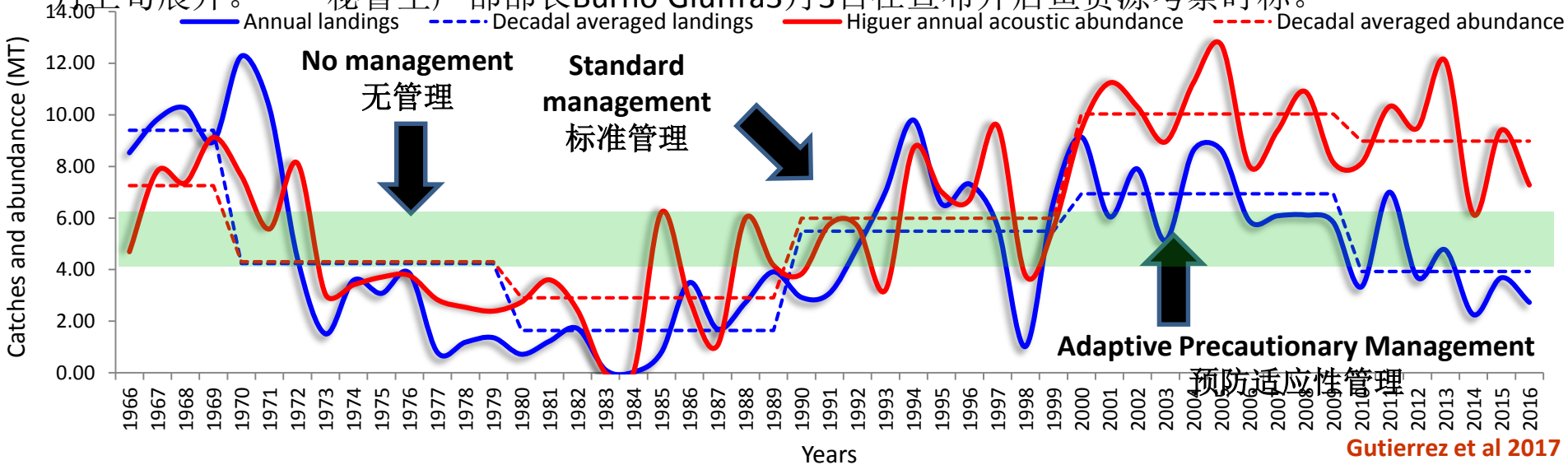
秘鲁气象机构：(05-2017号报告)：预计沿岸厄尔尼诺至少持续到4月份，强度中等偏弱



“There are still no worrying indicators that put at risk the anchovy fishing season. Nevertheless, if the acoustic study reveals that the conditions are not optimal the opening would be delayed to preserve the stock. I would not like to issue a warning signal, so if the conditions are auspicious, the season will begin between mid-April and early May.”

Bruno Giuffra, Minister of Production, on launching the Imarpe scientific cruise on 3rd March.

目前还没有迹象显示第一捕季鳀鱼捕捞会受到威胁。但是，如果声学考察显示情况不是最好，则开捕可能会延迟以保护鱼资源。我不想发布警告信号，因此如果情况好的话，捕季将会在4月中旬至5月上旬展开。-----秘鲁生产部部长Bruno Giuffra 3月3日在宣布开启鱼资源考察时称。



Among various indicators of the state of the biomass, its abundance is a key element. Imarpe considers that the spawning biomass should be between 4 and 6 million mt for the anchovy stock to be renewed sustainably.

在鱼资源状态的各种指标当中，资源量是最为关键的因素。秘鲁海洋研究院认为应保留400-600万吨的产卵鱼资源以保证可持续发展。



North Centre region quotas 中北部

First season (April-June) 第一捕季.

2.5 million metric tonnes 250万吨

Second season (November-January). 第二捕季

2 million metric tonnes 200万吨

Q1 700,000 metric tonnes 70万吨

Q2 2,500,000 metric tonnes 250万吨

Q3 100,000 metric tonnes 10万吨

Q4 2,000,000 metric tonnes 200万吨

South region quotas 南部

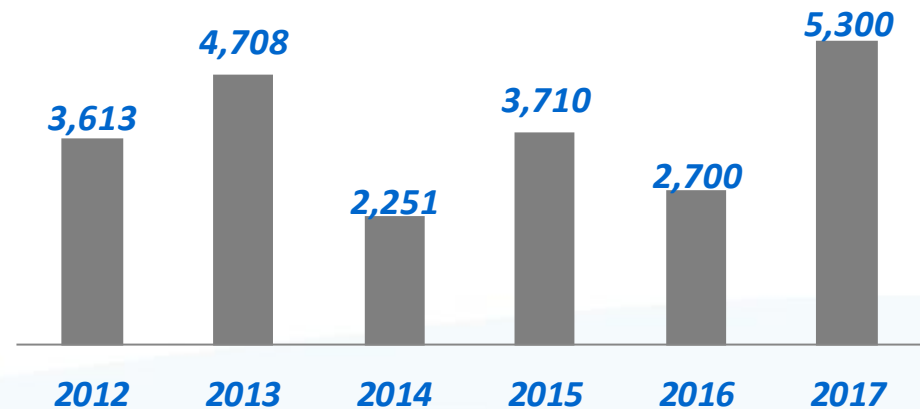
First season (January-June) 第一捕季.

515,000 metric tonnes 51.5万吨

Second season (July-December). 第二捕季

300,000 metric tonnes 30万吨

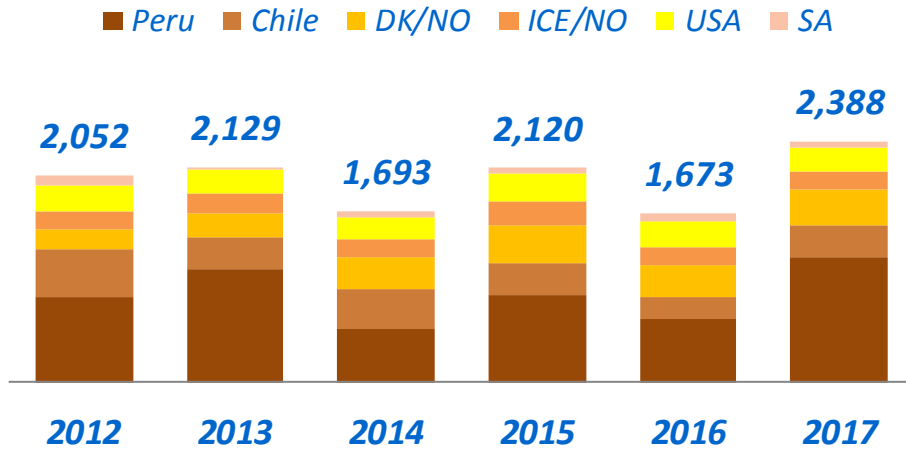
Raw material (000 mt)



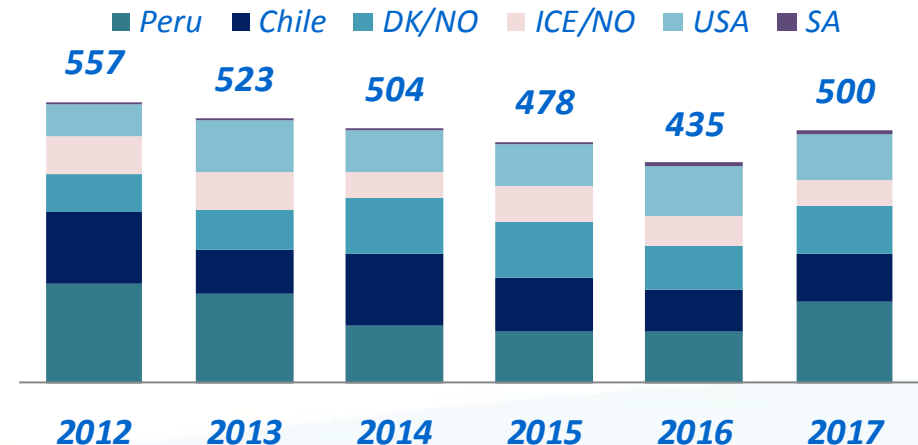
Year 2017: IFFO countries

2017年：IFFO统计国家

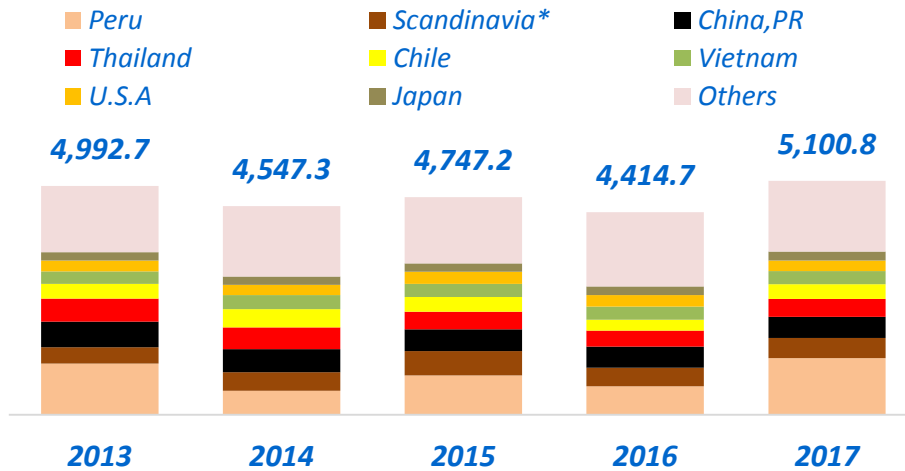
Total fish meal (000 mt) 鱼粉总产量



鱼油总产量 Total fish oil (000 mt)



Fishmeal world production ('000 mt) 鱼粉总产量



鱼油总产量

Fish oil world production ('000 mt)

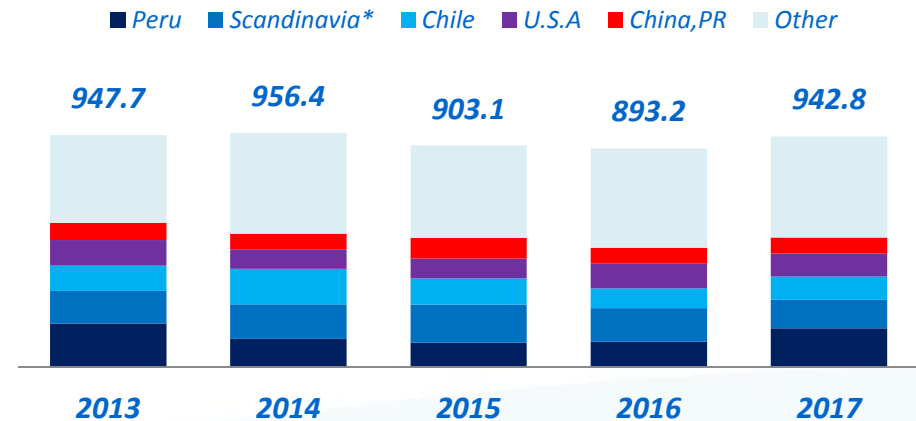
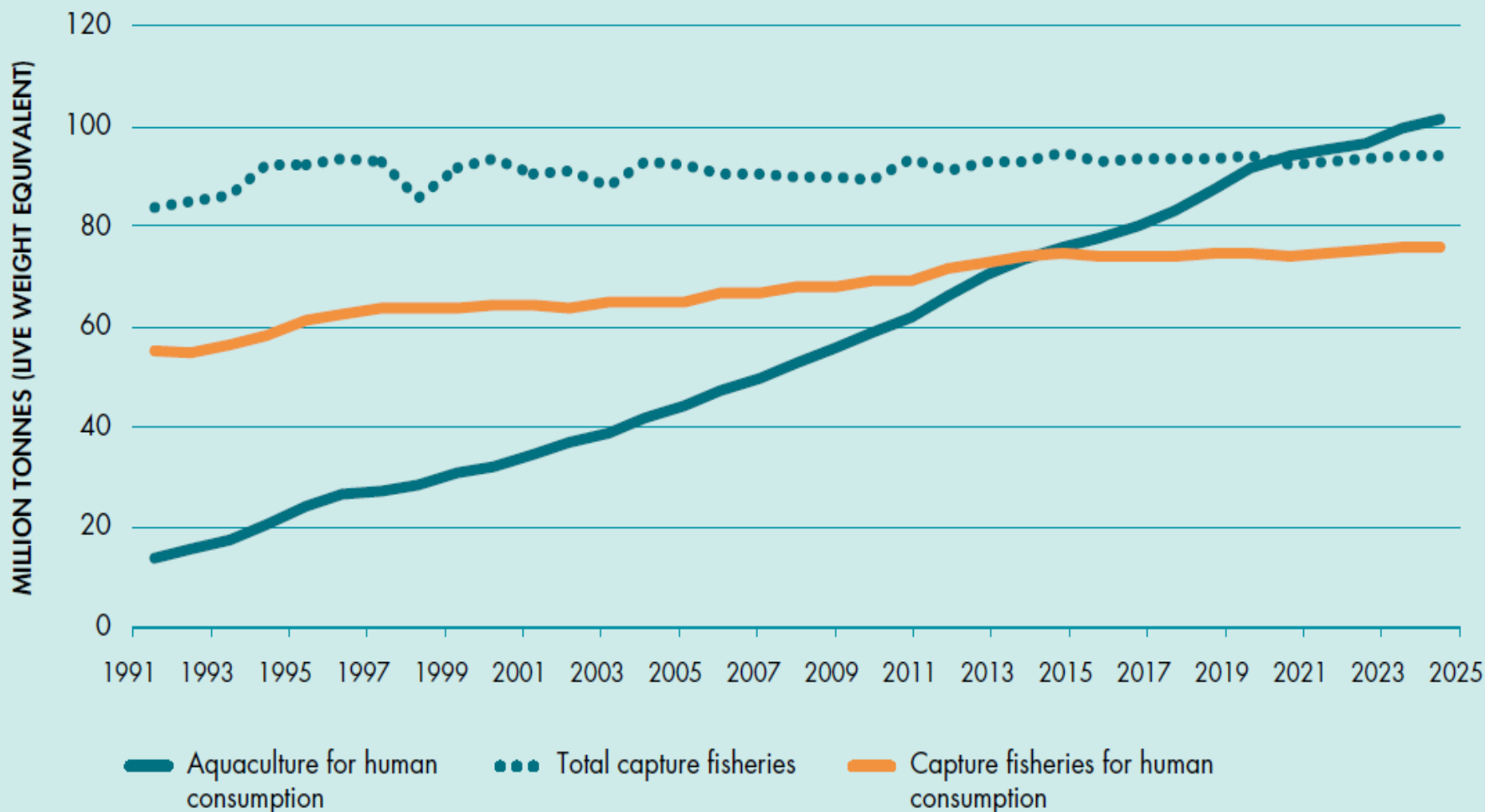


FIGURE 34

GLOBAL CAPTURE FISHERIES AND AQUACULTURE PRODUCTION TO 2025

全球渔业捕捞量及水产品产量预测：2025年



人类直接消费的水产量

捕捞总量

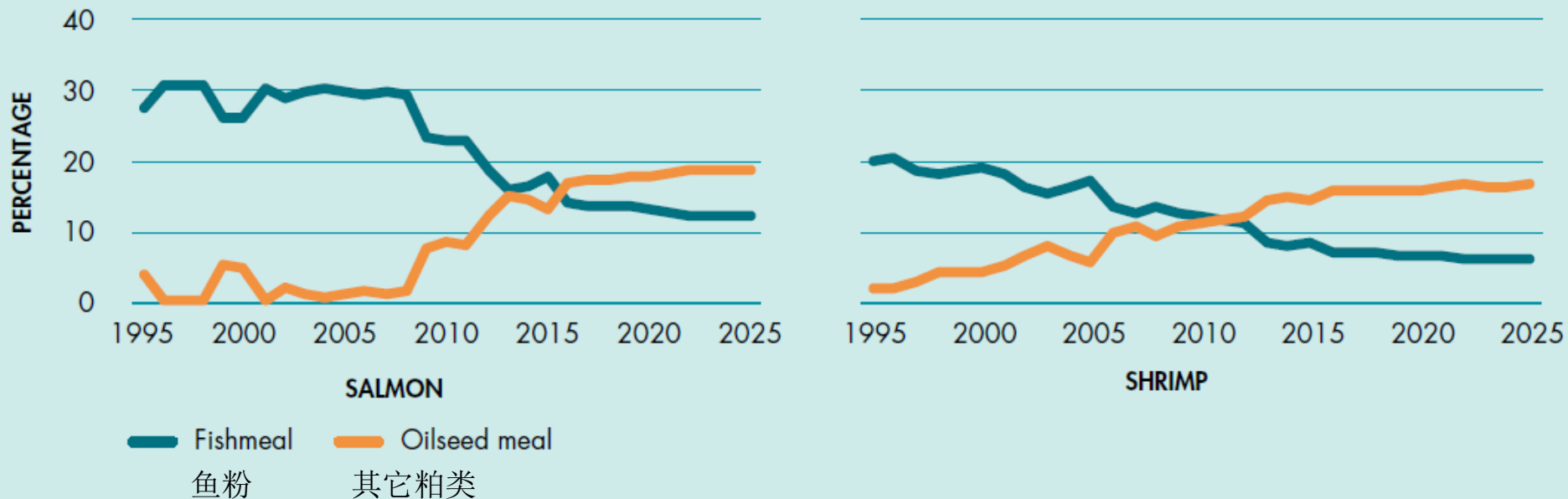
人类消费的捕捞总量

SOURCE: OECD and FAO.

FIGURE 37

SHARE OF FISHMEAL USED AS FEED IN AQUACULTURE PRODUCTION OF SALMON AND SHRIMP

饲料用鱼粉占水产品中三文鱼和虾的比重



SOURCE: OECD and FAO.

FAO. 2016.

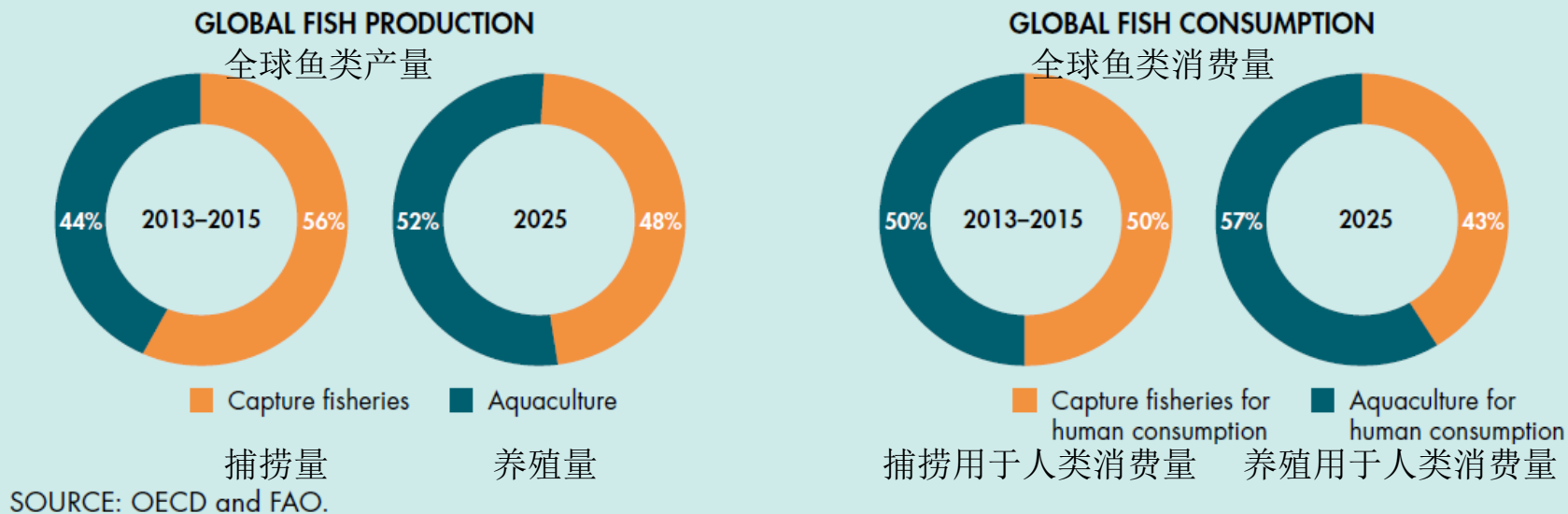
The State of World Fisheries and Aquaculture 2016.

Contributing to food security and nutrition for all. Rome. 200 pp.

FIGURE 38

RELATIVE SHARES OF AQUACULTURE AND CAPTURE FISHERIES IN PRODUCTION AND CONSUMPTION

全球鱼类产量和消费量中的养殖与捕捞占比



FAO. 2016.

The State of World Fisheries and Aquaculture 2016.

Contributing to food security and nutrition for all. Rome. 200 pp.

Traceability and Certification

追踪和认证



Since launch of IFFO RS in 2009

- 118 certified producers
- 40% of global production
- Supported by all leading feed companies

<https://www.youtube.com/watch?v=0S9lfs3GDsM> (9 mins)

Labour Standards 劳动标准



Thai Union hosts suppliers to explain Code of Conduct.

4th March 2016, Bangkok - Thai Union Group PLC (TU) held a special event for suppliers in Bangkok to inform them about the Company's strict Code of Conduct to ensure understanding and compliance.

Illegal, Unregulated and Unreported (IUU) Fishing

IUU捕鱼（非法、无监管、无报告）

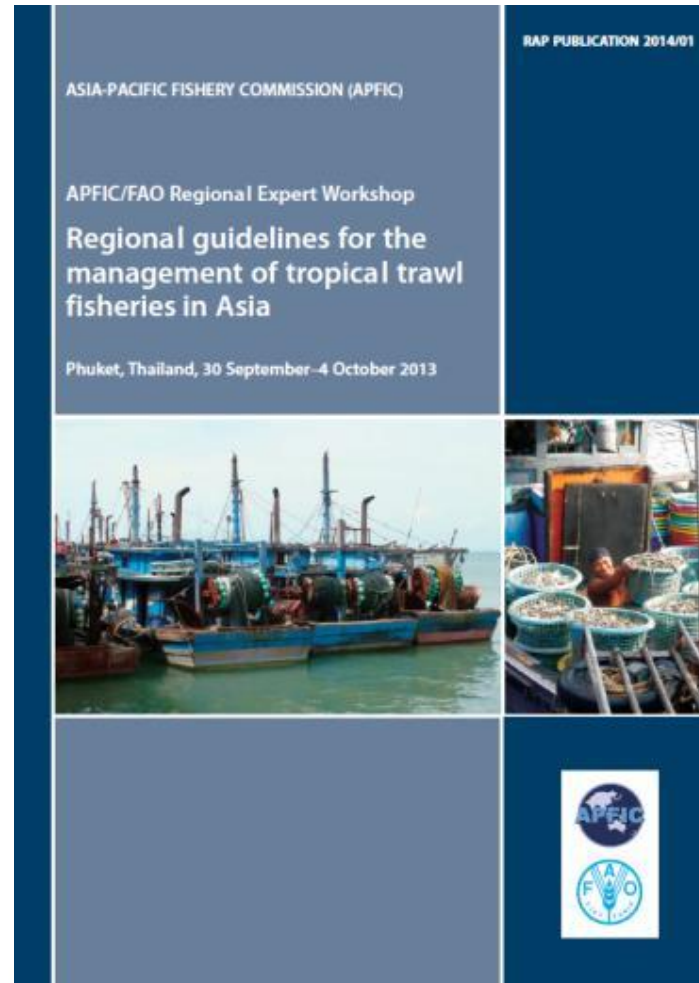


Mixed trawl fisheries

拖网混合捕捞



VERSION 2.0



Food vs Feed

食用 与 饲用

Fish 鱼类



Human 人类

Fish 鱼类



Farmed Animal 养殖动物



Human 人类



- Responsibly sourced?
负责任采购?
- Surplus to DHC?
多余供应人类直接食用消费?
- Free market? 自由市场?

Marine vs Non Marine

海产品 VS 非海产品



Get the balance right

平衡

- Cost 成本
- Availability 供应量



- Growth rate 成长率
- Animal Health 动物健康
- Environmental impact 环境影响

AS WELL AS, NOT INSTEAD OF

Thank you for listening

Xie Xie

谢谢!

