

Global trends in supply, markets and trade

St. Petersburg, 10 September 2021

**Audun Lem, PhD
Deputy Director
FAO Fisheries and Aquaculture Division**

Outline

- **Production**
 - Capture
 - Aquaculture
- **Trade**
- **Future**

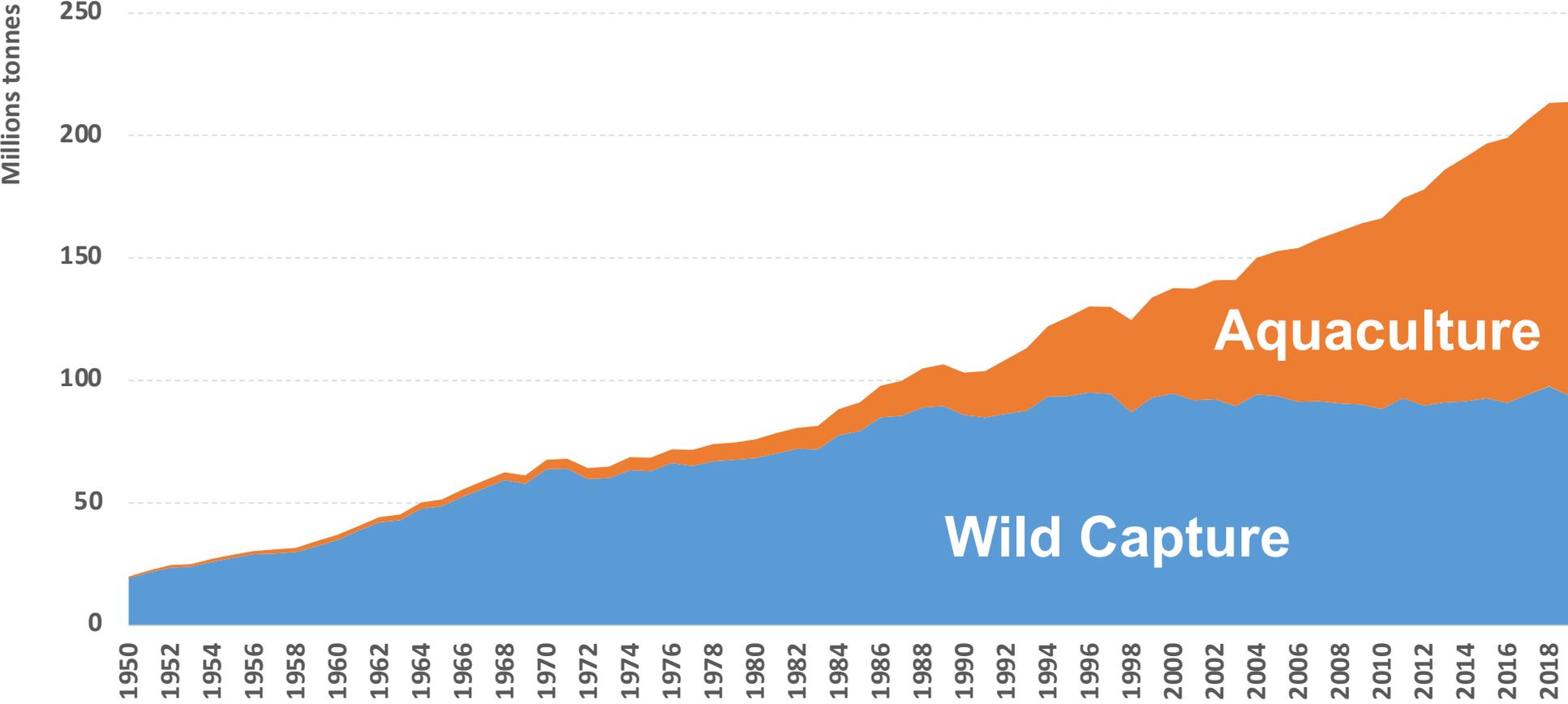
Main messages: last two decades

- Rising demand for fish and fishery products
 - Population growth and nutritious food demand
- Strong increase in global aquaculture production
- Growth in world fish trade in volumes and value
- Global call for sustainable sector development in all 3 dimensions

Data for

PRODUCTION - GLOBAL

Global fisheries and aquaculture production

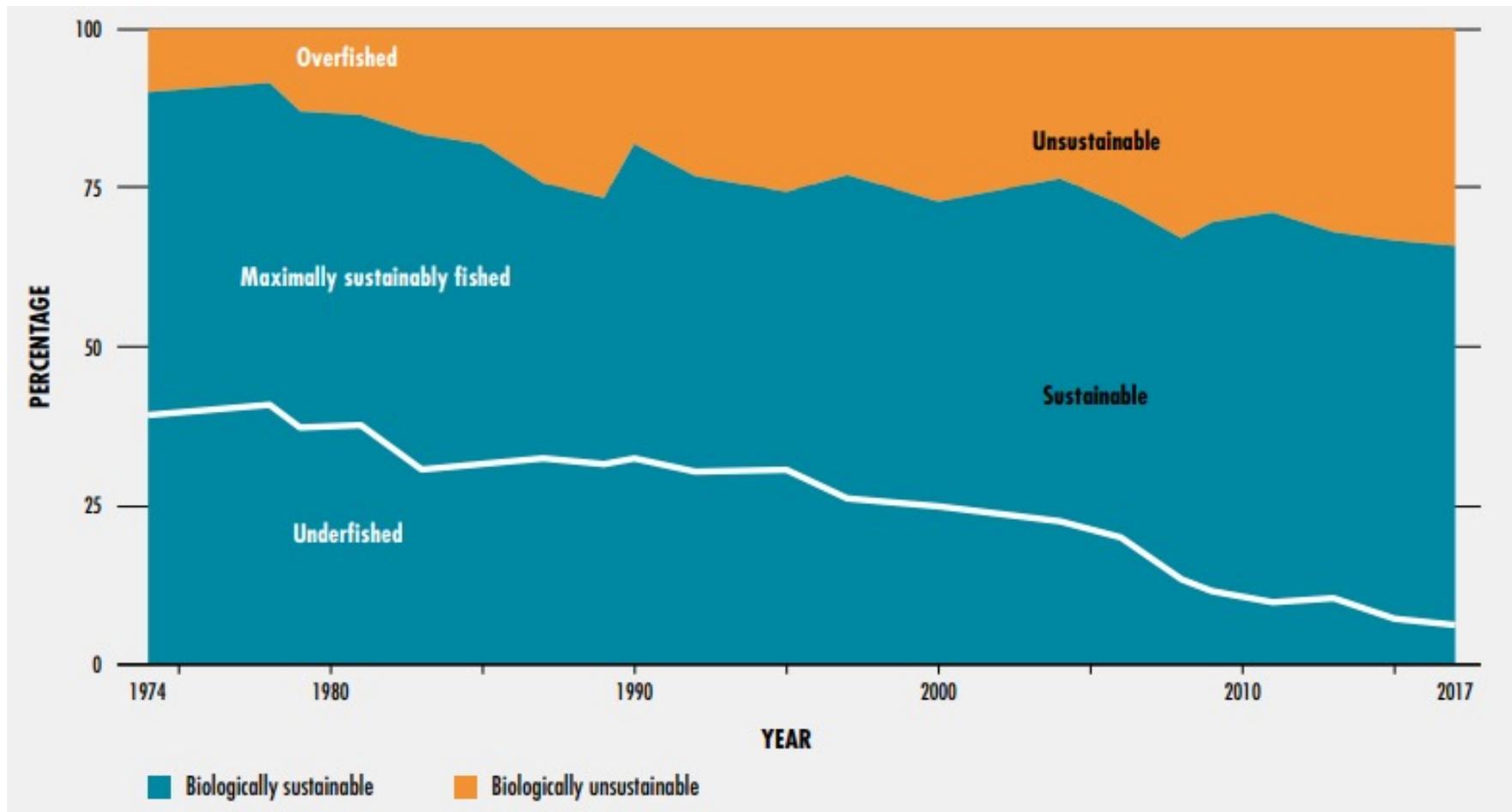


Data source: FAO, including aquatic plants

Data for

PRODUCTION - CAPTURE

Global trends in the state of marine fish stocks since 1974

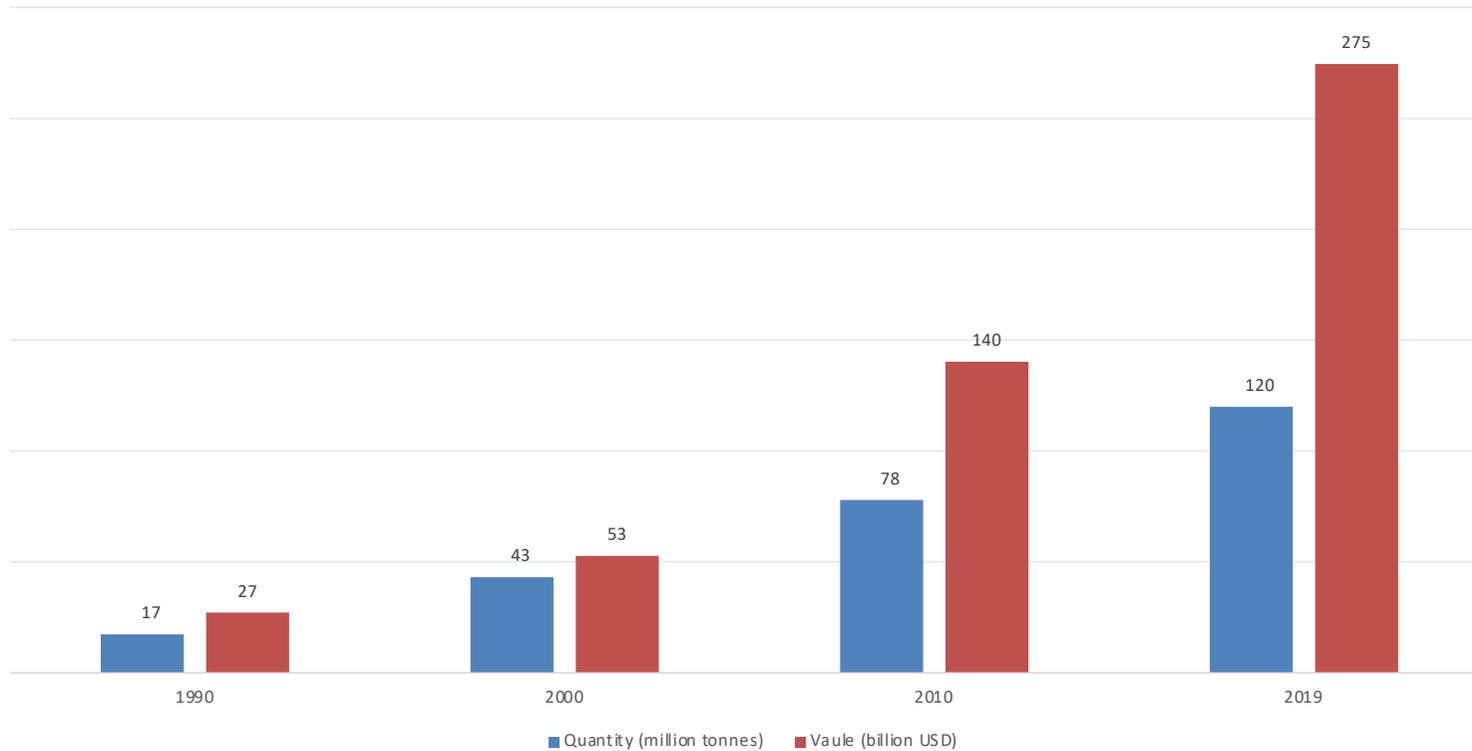


Data for

PRODUCTION - AQUACULTURE

Aquaculture is one of the fastest growing food producing sectors: Global aquaculture production grew 7 percent a year from 17 million tonnes in 1990 to 120 million tonnes in 2019 (8 percent from USD 27 billion to USD 275 billion) incl. plants

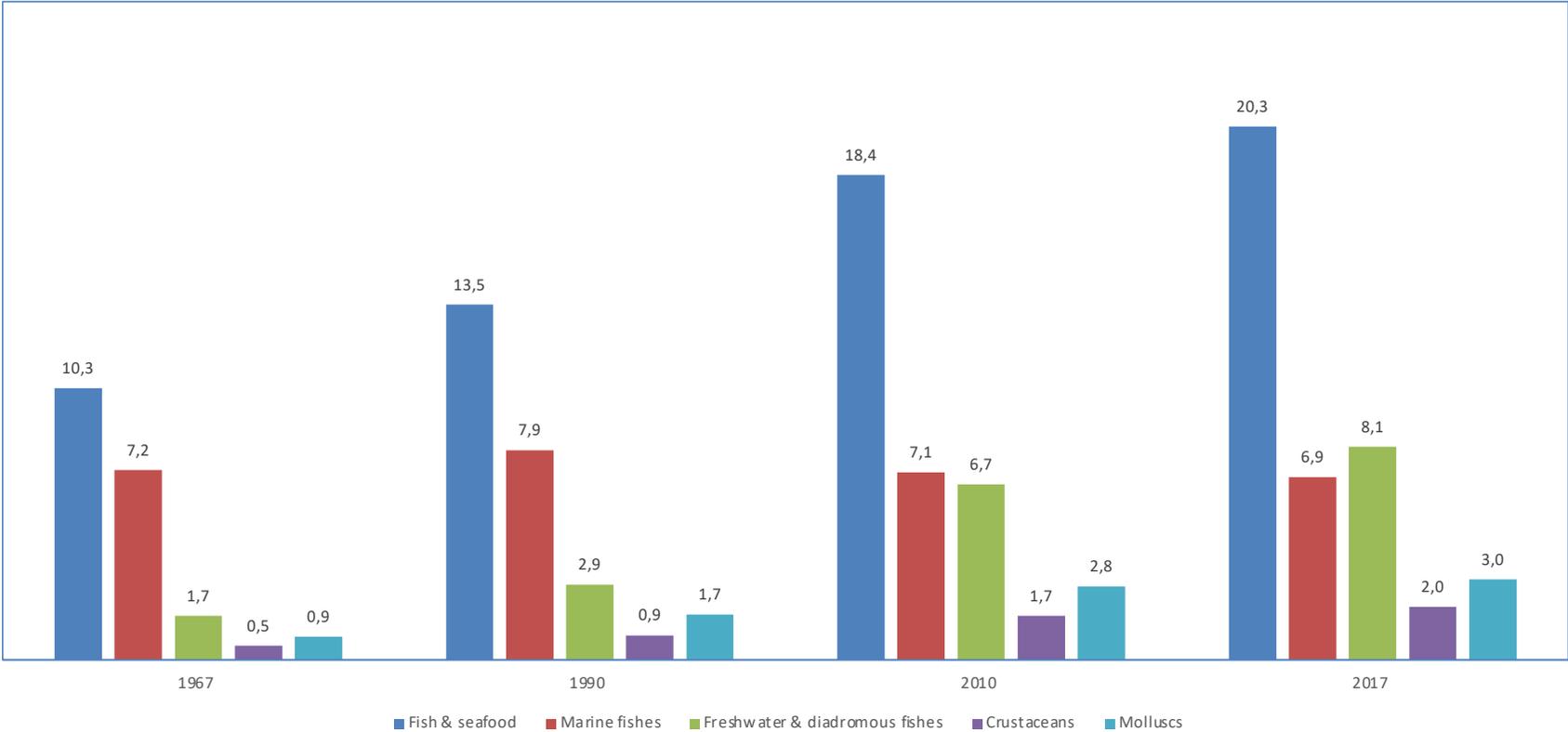
Status and trends of global aquaculture production



Data source: FAO. 2021. Fishery and Aquaculture Statistics. Global aquaculture production 1950-2019

Thanks to aquaculture, between 1967 and 2017, world per capita fish consumption doubled from 10 kg to 20 kg. The consumption of freshwater fish increased from 1.7 kg to 8.1 kg, whereas that of marine fish declined from 7.2 kg to 6.9 kg.

World average per capita consumption of fish and seafood (kg/capita)



Data source: FAO. 2020. Fishery and Aquaculture Statistics. Food balance sheets of fish and fishery products 1961-2017

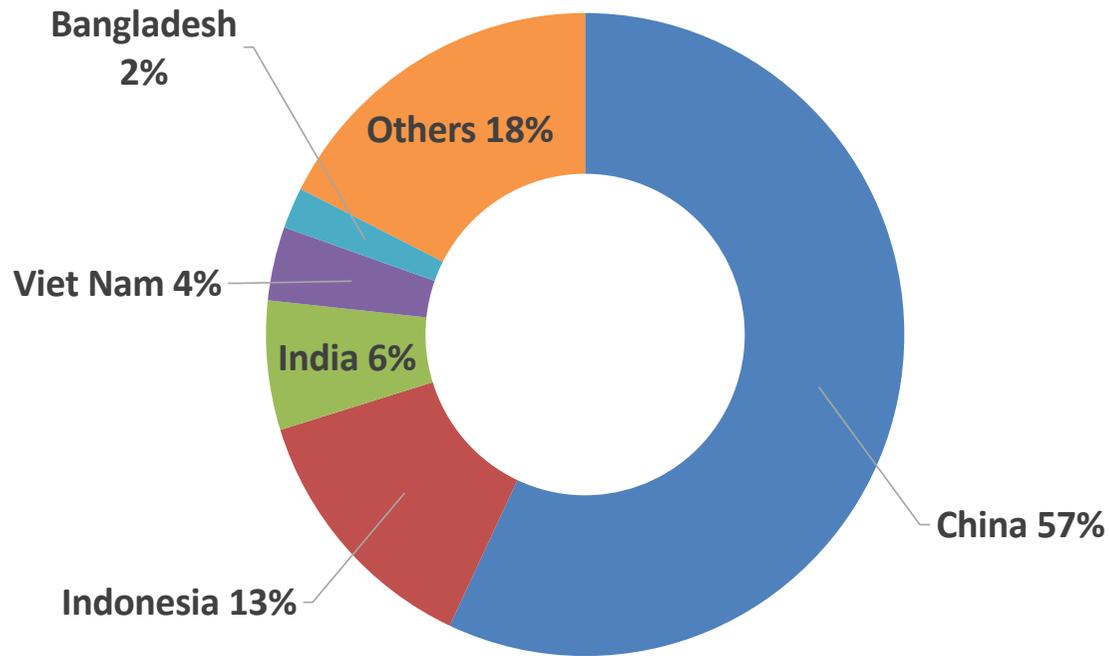
Imbalanced consumption across regions and species: High consumption of marine fishes in Oceania and Europe; high consumption of freshwater & diadromous fishes in Asia.

| Area | Per capita consumption in 2017 (kg) | | | | | |
|---------------------------------|-------------------------------------|---------------|--------------------------------|-------------|-------------|-------------------------------|
| | Fish and seafood | Marine fishes | Freshwater & diadromous fishes | Crustaceans | Molluscs | Miscellaneous aquatic animals |
| World | 20.26 | 6.94 | 8.09 | 2.02 | 3.05 | 0.16 |
| Developed regions | 24.51 | 12.80 | 4.42 | 3.55 | 3.68 | 0.06 |
| Developing regions | 19.40 | 5.76 | 8.83 | 1.71 | 2.92 | 0.18 |
| Least developed countries | 12.60 | 3.87 | 8.36 | 0.30 | 0.07 | 0.00 |
| Landlocked developing countries | 4.61 | 1.10 | 3.50 | 0.01 | 0.01 | 0.00 |
| Small Island Developing States | 15.70 | 10.94 | 2.06 | 1.40 | 1.25 | 0.05 |
| Oceania | 25.03 | 15.75 | 3.14 | 3.26 | 2.80 | 0.09 |
| Asia | 24.06 | 6.32 | 10.93 | 2.37 | 4.19 | 0.25 |
| Europe | 21.49 | 13.01 | 3.85 | 1.77 | 2.84 | 0.02 |
| Americas | 14.81 | 6.22 | 3.89 | 2.90 | 1.73 | 0.07 |
| Latin America and the Caribbean | 10.49 | 5.51 | 3.21 | 1.01 | 0.69 | 0.08 |
| Northern America | 22.40 | 7.46 | 5.09 | 6.22 | 3.57 | 0.05 |
| Africa | 9.93 | 5.82 | 3.86 | 0.17 | 0.07 | 0.00 |
| Sub-Saharan Africa | 8.53 | 5.06 | 3.25 | 0.16 | 0.06 | 0.00 |

Data source: FAO. 2020. Fishery and Aquaculture Statistics. Food balance sheets of fish and fishery products 1961-2017

2019 Aquaculture: top producers

Percentage of total production (120 million tonnes)

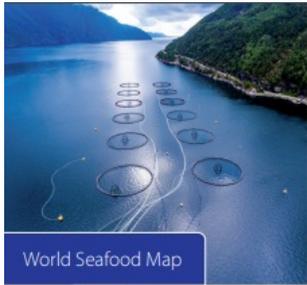


**Asia
contribute
more than
90%**

Note: including aquatic plants

Data for

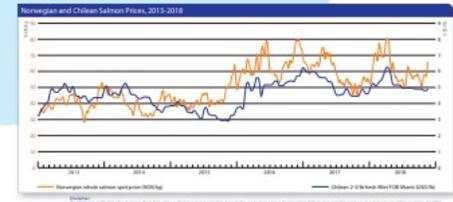
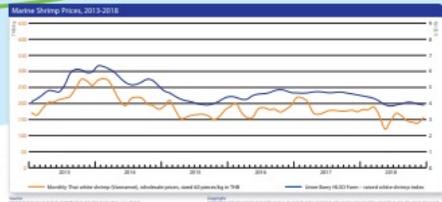
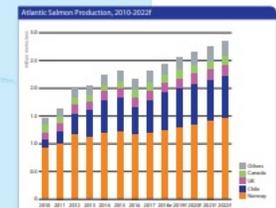
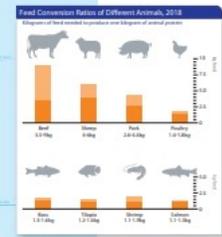
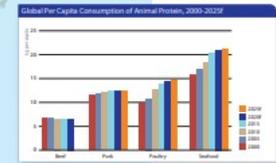
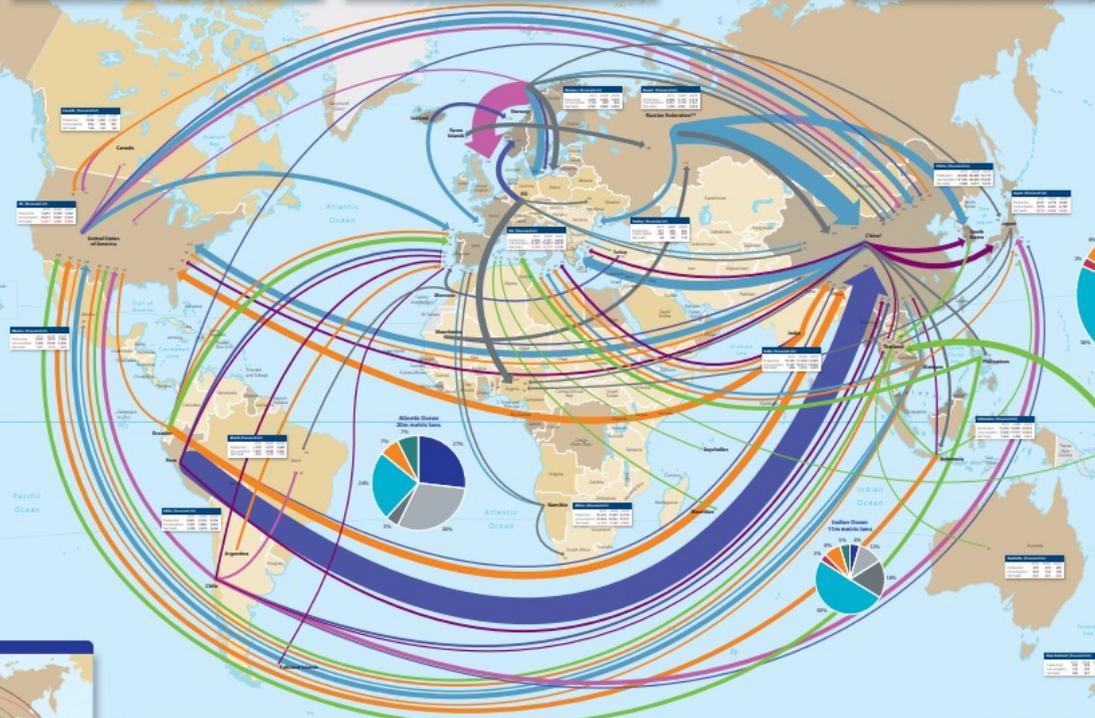
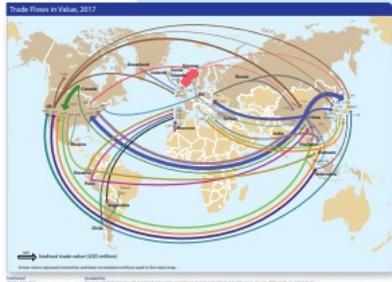
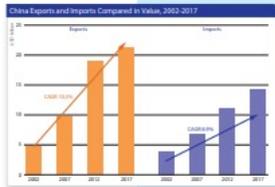
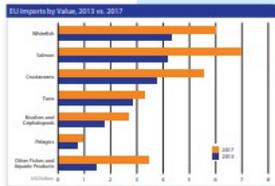
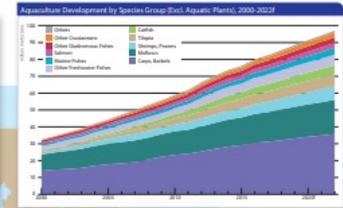
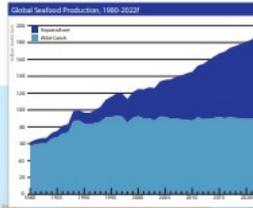
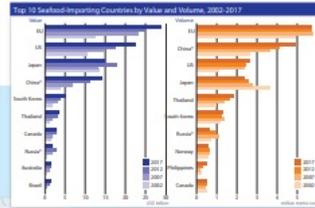
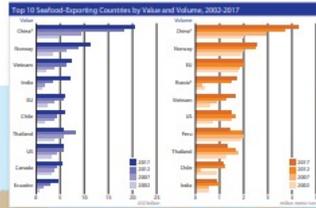
TRADE



World Seafood Map

Rabobank
Food & Agribusiness

Rabobank Group is a Netherlands based international financial services provider focused on food, with operations in 40 countries. Visit rabobank.com to learn more about our knowledge and services in the various FA&A sectors.



Aquaculture Future

- Aquaculture will continue to grow strongly
 - Challenge: Sub-Saharan Africa, SIDS
- Aquaculture is driving innovation, product development, logistics and distribution
- Trade facilitates consumption worldwide incl. land-locked countries and SIDS
- But
 - Sustainability and food safety concerns drive traceability and certification trends
 - In many countries, challenges in governance, legislative framework, access to finance and insurance
- **FAO Guidelines on Sustainable Aquaculture (GSA) under development**



THANK YOU



**INTERNATIONAL YEAR OF
ARTISANAL FISHERIES
AND AQUACULTURE**

2022