

# Research Report On China's Aquatic Products Market

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## Abstracts

The total domestic consumption of aquatic products in China has reached 46 million tons in 2006. In which the market share of imported aquatic products account for 1.6%-2% of total. Since China has become the world biggest country in fishery and aquiculture, the current total value of China exported aquatic products takes up to 10% of world gross export value of aquatic products, reached USD 8.96 billion in 2006.

The value of China imported aquatic products has kept steadily increasing since China opened the market. In 2006, the gross value of imported aquatic products reaches up to USD 3.19 billion, increased by 9.63% over that of the previous year and is 2.03 times of that in 2002. In the first six months of 2007, China imported aquatic product has been up to 1717 thousand tons, deducting 810 thousand tons of materials for processing of imported products and 521 thousand tons of fish powder, the actual imported aquatic products for resident consumption is 386 thousand tons (exclude ship back of ocean capture), which is 19.9% increase over the same period of the previous year. In which, the frozen fish from Russia is the main source of raw materials for further processing in China; Peru is the largest source country of China imported fish powder; Aquatic products for direct edible consumption are mainly to meet the demands for aquatic products in China caused by the limited supply domestically and the products mainly include frozen fish, like hairtail, clupeoid and codfish etc., mollusks (sleevefish) and shrimp.

In recent years, the purchasing power and willingness of China consumers present an increasing tendency. Both for urban and rural consumers, consumption in catering industry as well as household, in coastal aquatic products consumption areas or non-consumption areas for aquatic products of inland cities, the proportion and consumption quantity of aquatic products are both increasing. But compared with Korea, Japan, Chinese Taiwan and Europe, the per capita consumption of aquatic products in China is still in the low level, only 16.2 kilos in urban residents and 5.6 kilos in rural in the year

2006. There are huge development potential and improve space in China aquatic products market. After finishing this research work, we can make a reserved estimation that the average annual increase of 5%-6% will be available for the demand of aquatic products in domestic market in the period from now to 2010 with an annual consumption of 45.20 million tons to 52.55 million tons.

In China domestic market, the low end aquatic products mainly refer to grass carp, crucian, bighead carp, tilapia, hairtail and shrimps; main medium level fish include mandarin fish, river eel, eel, rainbow trout, pelteobagrus vachelli and weever etc.; high end consumables refer to imported products such as sturgeon, southern catfish, channel catfish, eel, ivory clam, sea cucumber and sea-ear, etc..

The consumption of aquatic products in China presents a stepping declination from east to west. Coastal cities in east and south parts of China and large and medium sized developed cities are the main areas consuming aquatic products. But with the development of transportation and freshwater farming, the consumption of aquatic products in inland cities has enlarged a lot than before. Judging from the supervision of the change of aquatic products consumption quantity, we can see that the growing tendency is no obvious in traditional consumption areas of aquatic products such as east and south parts of China, which proves that the increase of China increasing consumption on aquatic products rely mainly on the growth in inland cities, especially areas with developed economy (such as Shanxi, Hubei, Hebei and Henan etc.).

The sale season of aquatic products in China is mainly influenced by the two factors of seasonal production of fishery and holiday consumption. From October every year to March of the next year are the high season for aquatic products. Traditional festivals and holidays such as National Day, May Day holiday and New Year holiday, Spring Festival are all included in this period of time. The demand increases largely and the large quantity of aquatic products entering market ensures the supply.

Through this study, we believe that China aquatic products market mainly constituted of fish is in a rising period of gradual mature. In the coming ten years, the consumption in domestic market will mainly from domestic produced aquatic products and compensated by import aquatic products. The export market is similar to this, re-export of processed import raw materials will work as a compensation for a long time and will increase steadily. After a comprehensive analysis of domestic aquatic products market, factors that will promote the increase of import aquatic products include the following: The protection of domestic natural resources of fishery increases the demand for imported aquatic products; The enhancement of purchase capacity and adjustment of

diet structures of domestic consumers enlarge the market capability, thus enlarging the demand for import aquatic products; The appreciation of RMB increases the ration of quality to price of import aquatic products; The continual increase of China exported aquatic products bring with a strong demand for imported aquatic products raw materials.

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