

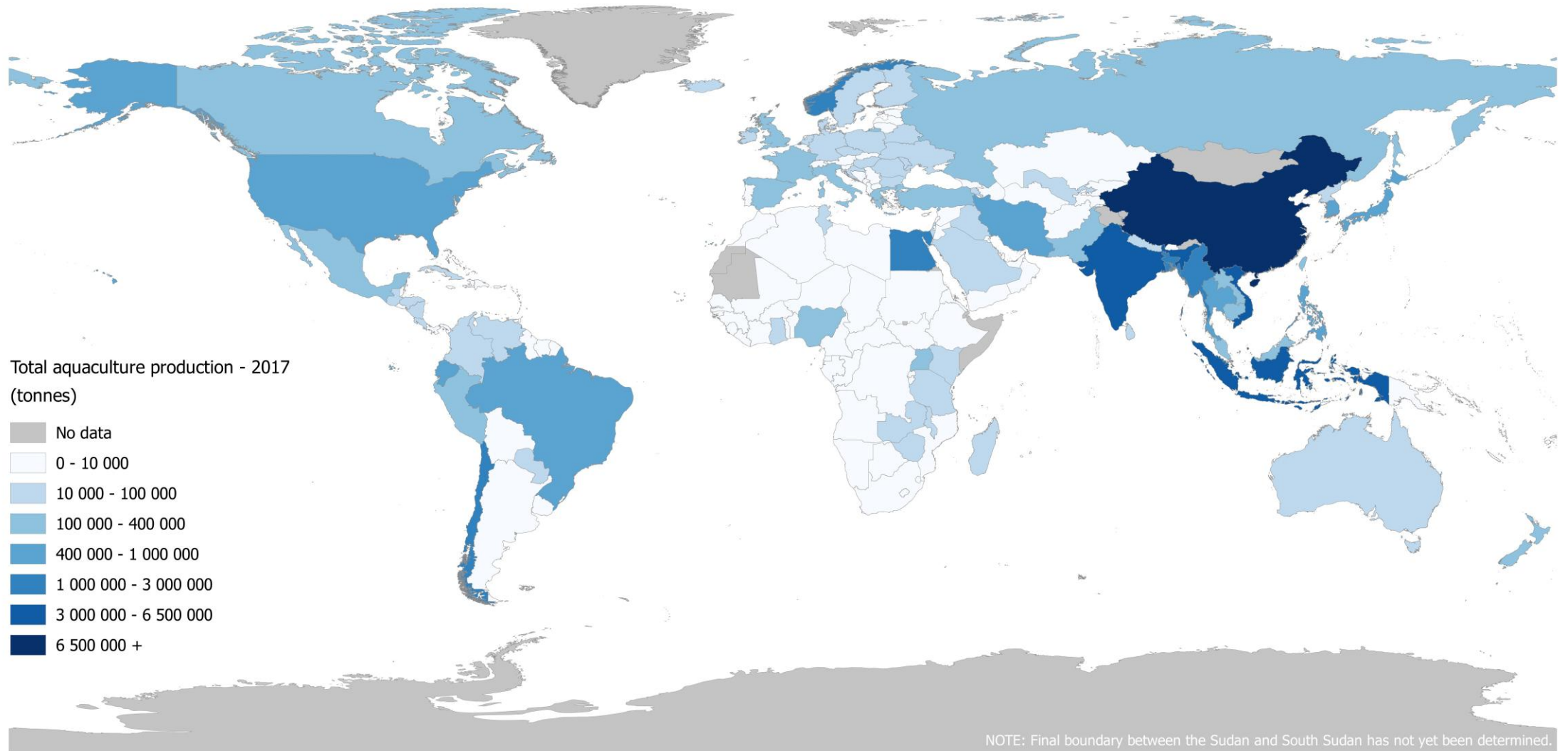
# Prospects for aquaculture by 2030

Verona, 16 May 2019

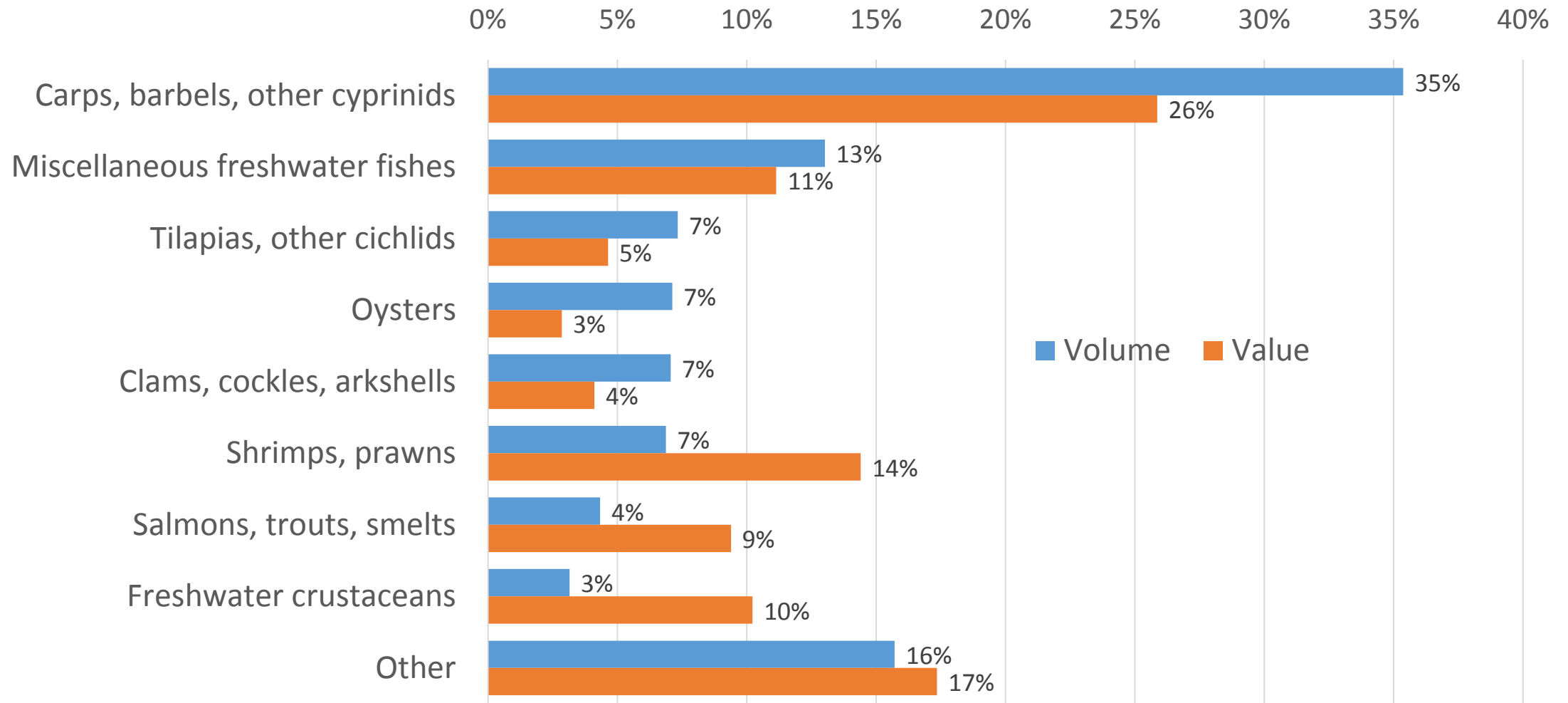
Adrienne Egger

Stefania Vannuccini, Pierre Charlebois

# Total aquaculture production 2017



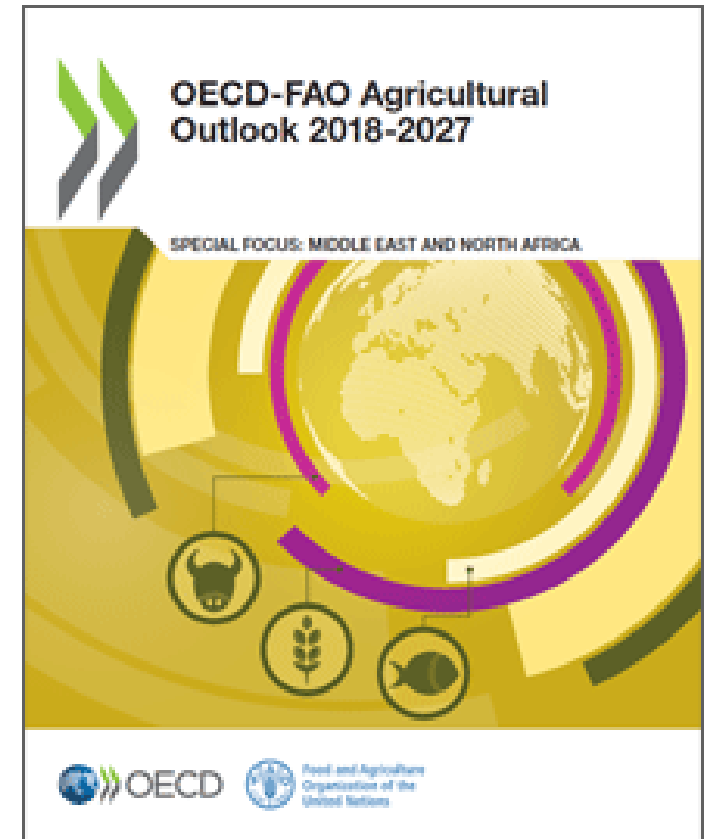
# Aquaculture production by main ISSCAAP groups - 2017



# OECD-FAO Agricultural Outlook

- Joint OECD-FAO report (14th)
- Country collaborators
- Aglink-COSIMO, partial equilibrium model
- 10 year horizon
- Global coverage
- Special theme: Middle East and North Africa

<http://www.agri-outlook.org/>



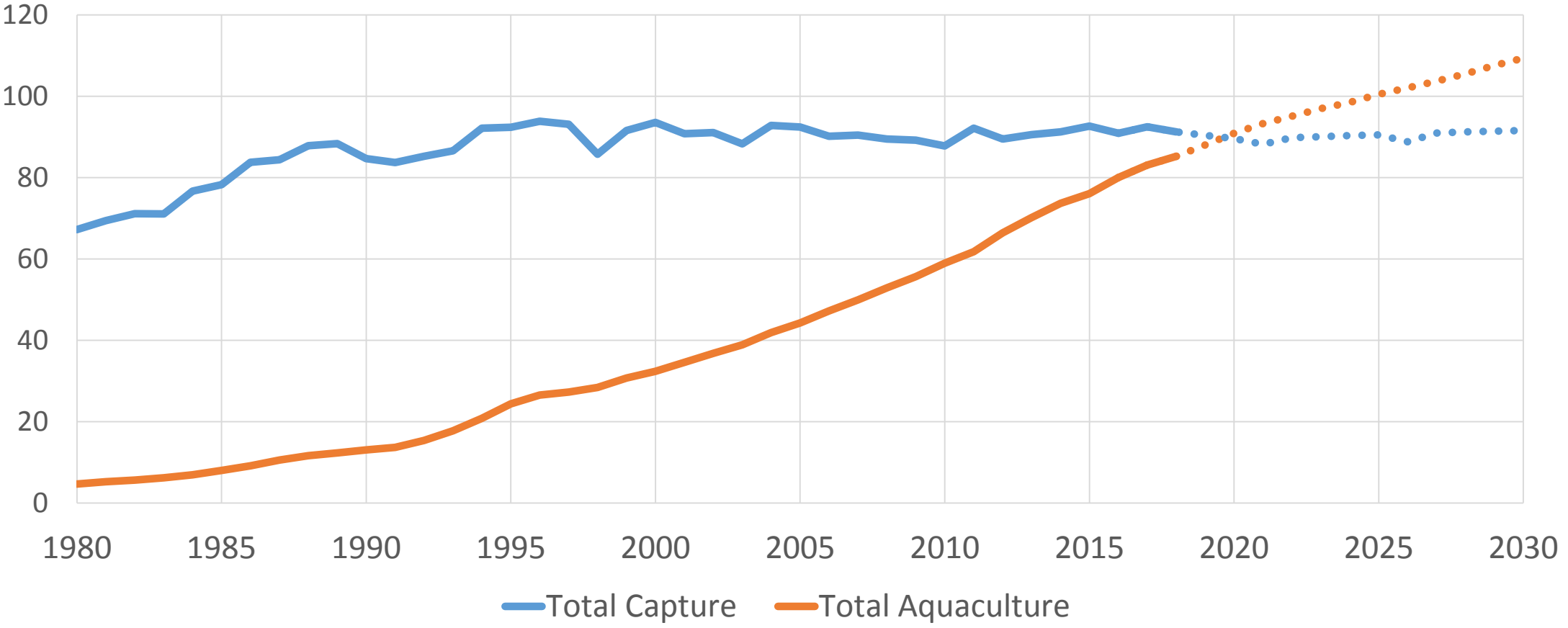


# Projection Highlights

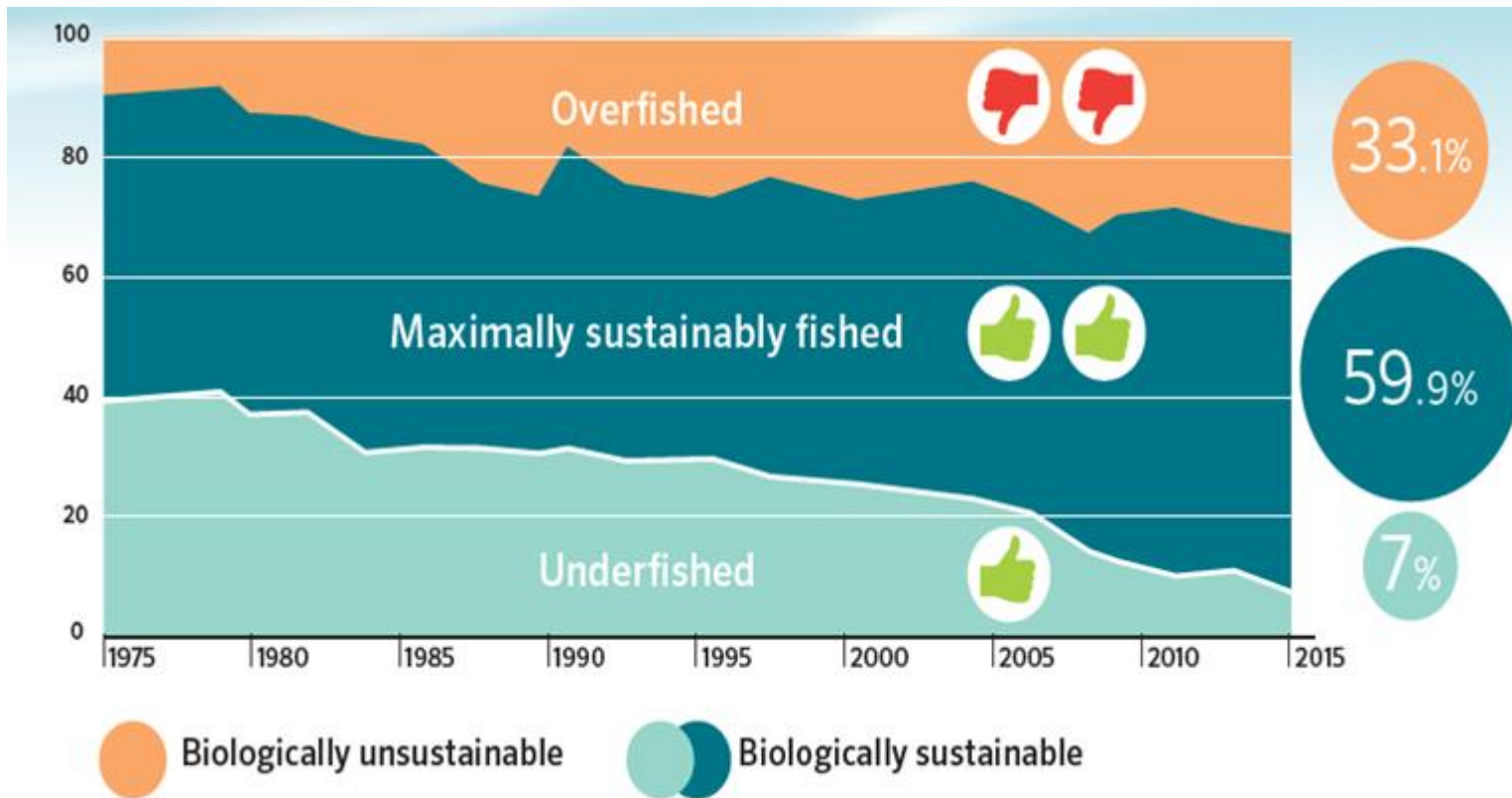
- Total production to increase by 13%, but slowdown in growth rates
- Most of the growth from aquaculture
- Fish food consumption is projected to grow by 23 Mt
- Consumption to increase in all continents, except Africa
- Decline for Africa: alarm for food security

# Aquaculture main driver for global production growth

Million tonnes (live weight)



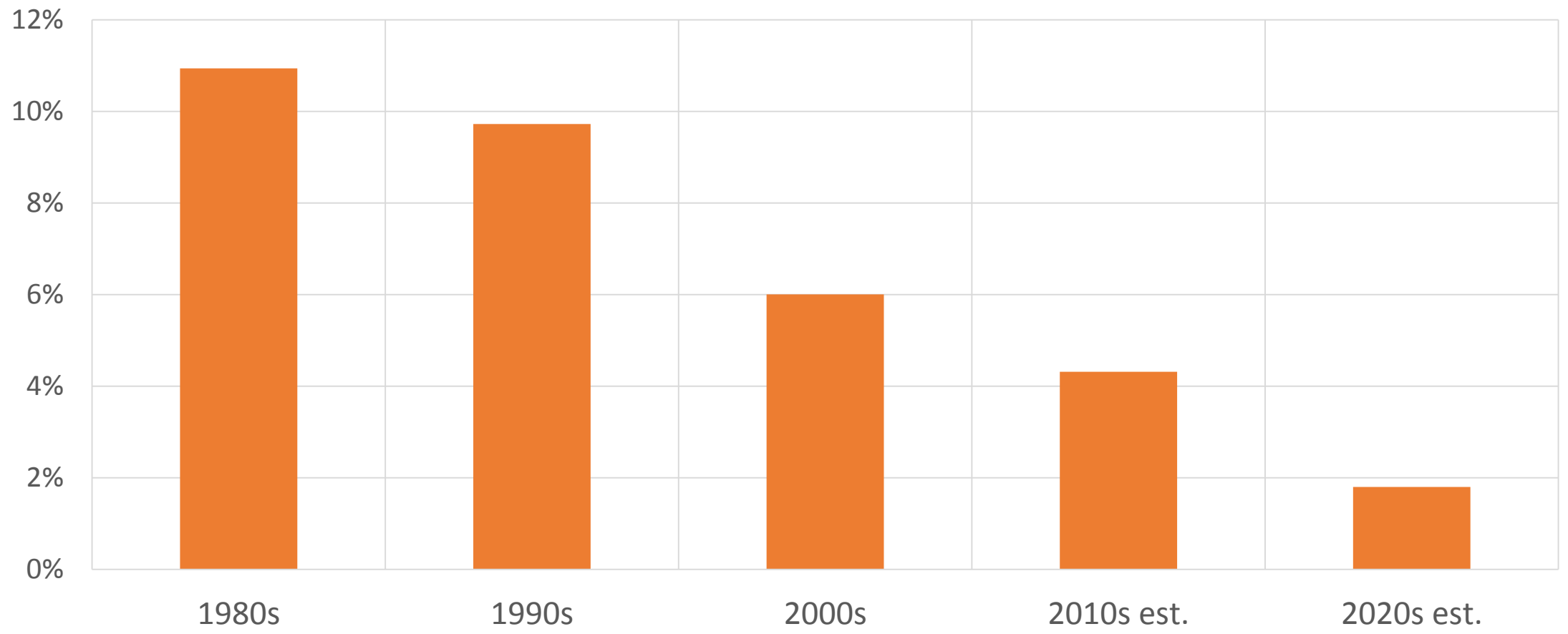
# The status of marine fishery resources



- Continues to show worrying trends:**
  - Overfished stocks increased from 10% in 1974 to 33% in 2015
  - Stocks fished within biologically sustainable levels decreased from 90% in 1974 to 67% in 2015
  - The global picture masks signs of recovery in the developed world, but not in developing countries
  - This regional sustainability divide constitutes a major challenge to achieving SDG14.4 (By 2020 all stocks at MSY level)

# Growth rates in aquaculture production to slow down

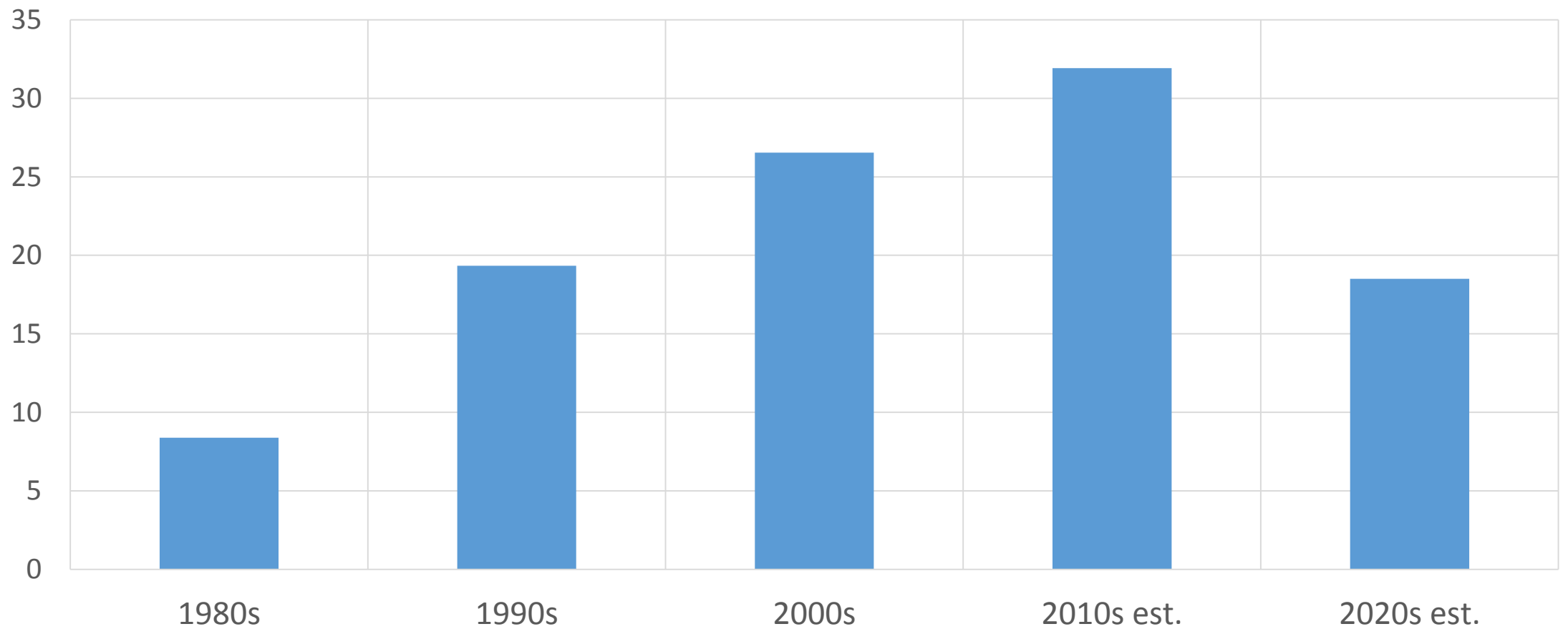
Aquaculture production - Average annual growth rates (%)





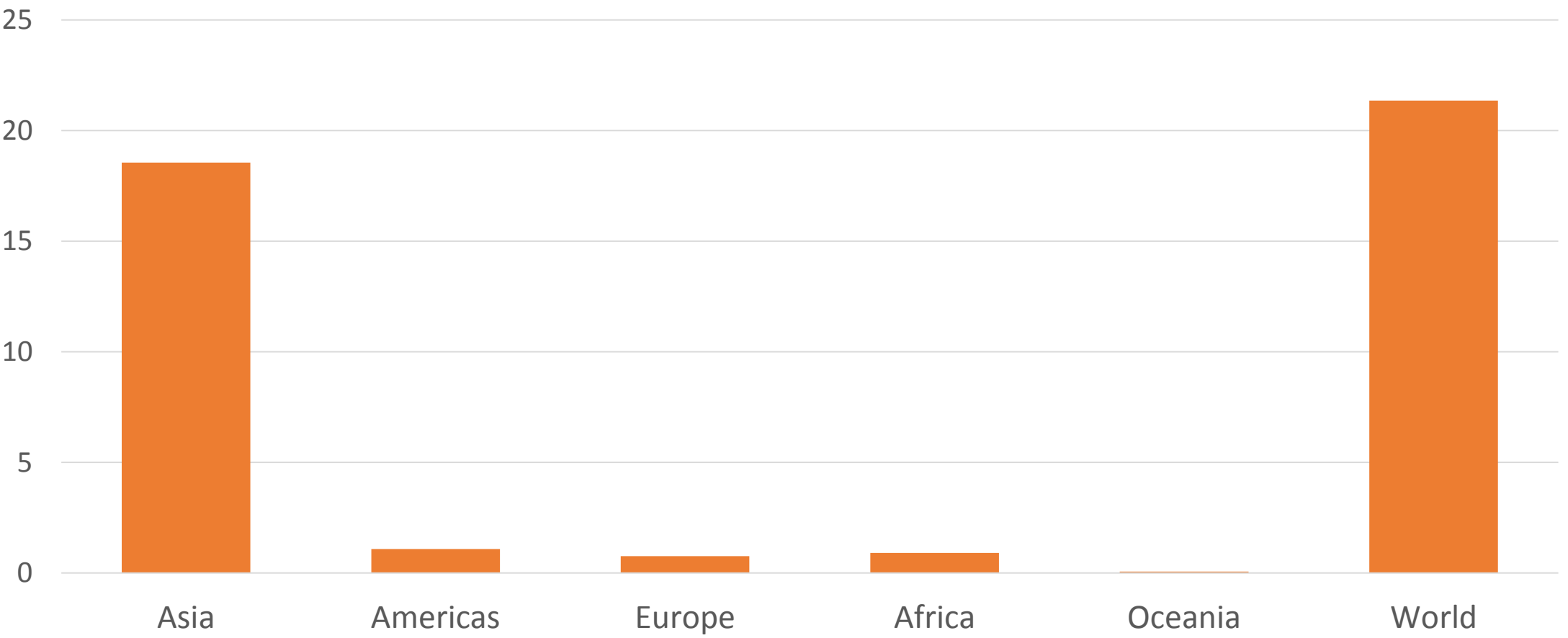
# Increased aquaculture production volumes by decade

Increased production volumes – Million Tonnes



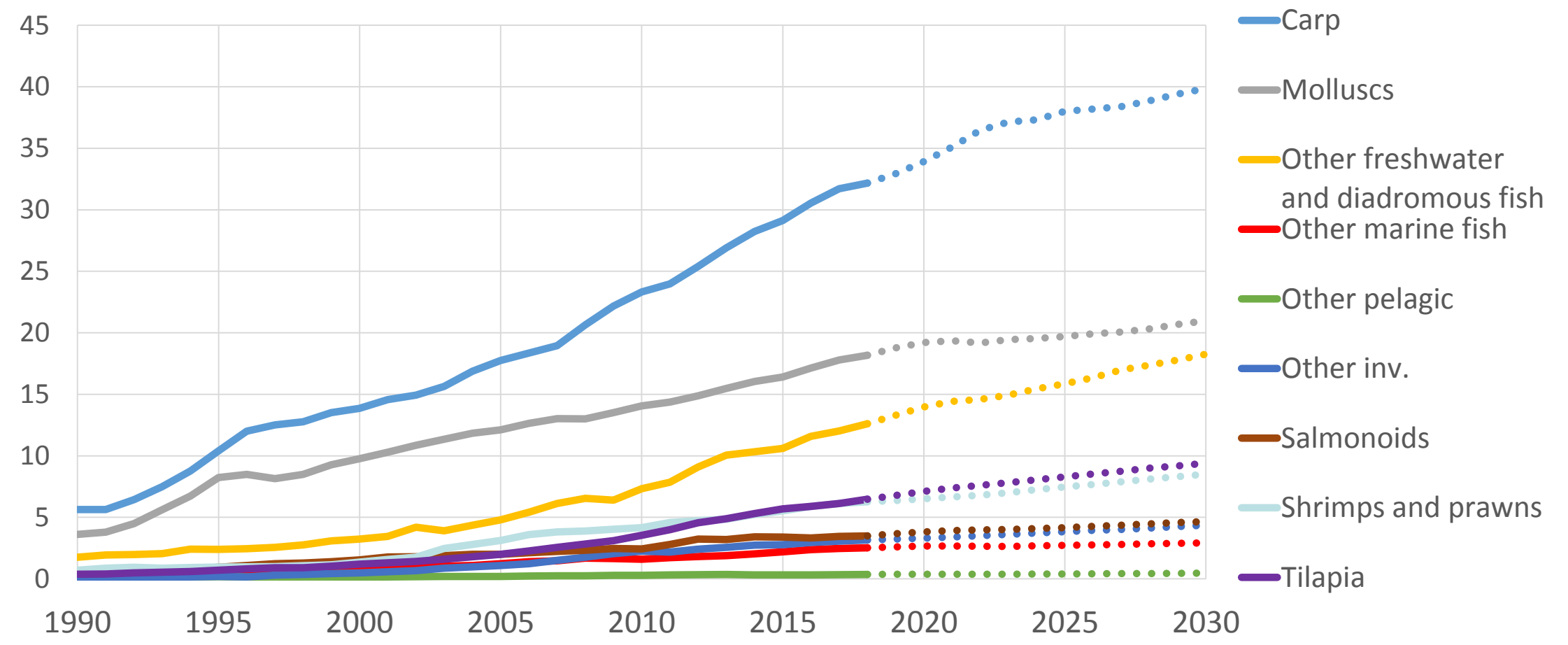
# Asia main contributor to aquaculture production growth by 2030

Change in aquaculture production (2030 – 2018-20) - Million tonnes (live weight)



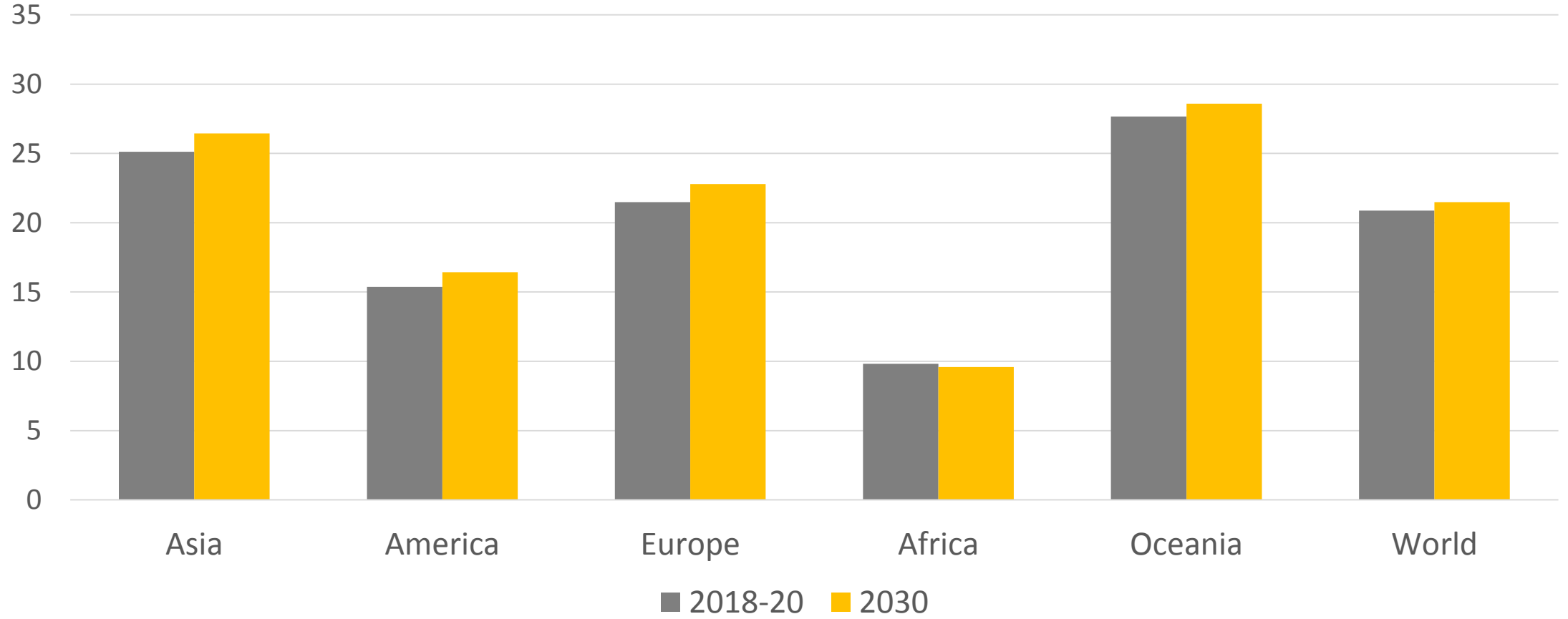
# Freshwater species main contributors to aquaculture production growth

Million tonnes (live weight)



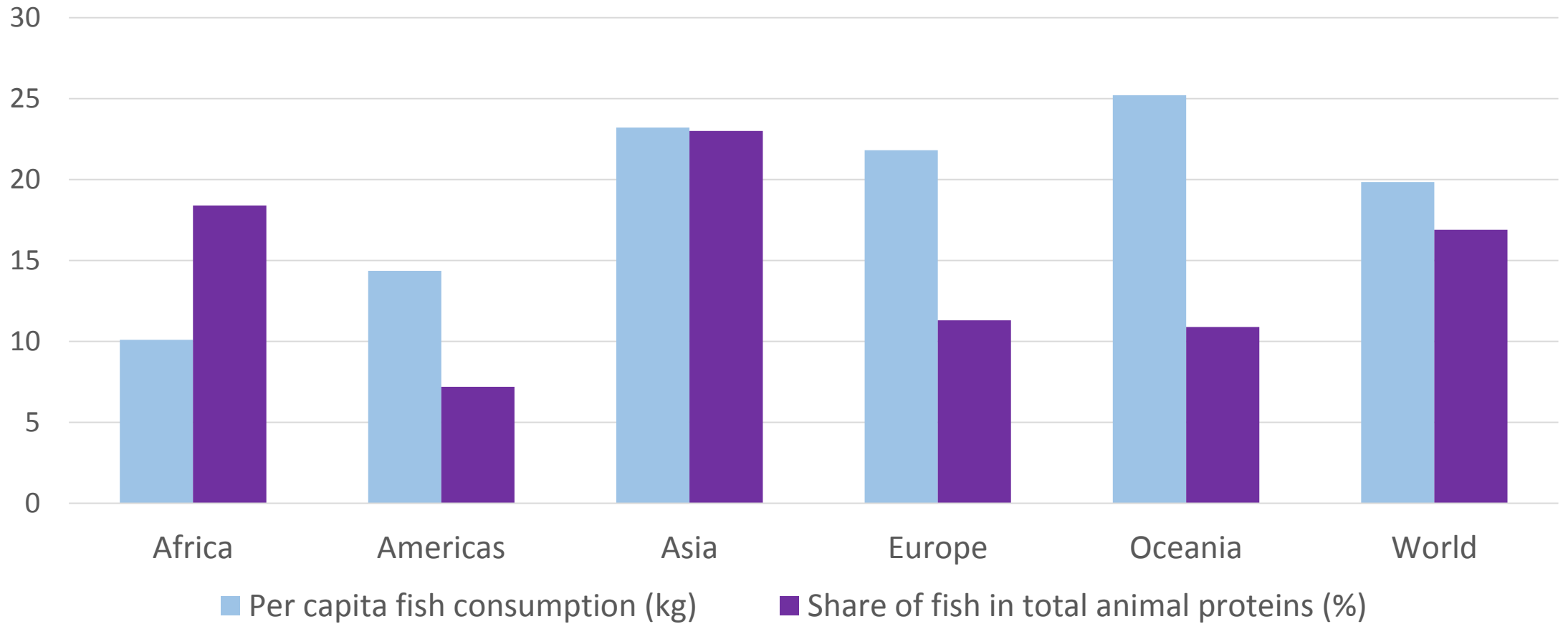
# Fish consumption per capita to increase in all continents except in Africa

Fish consumption per capita (kg/person/year)



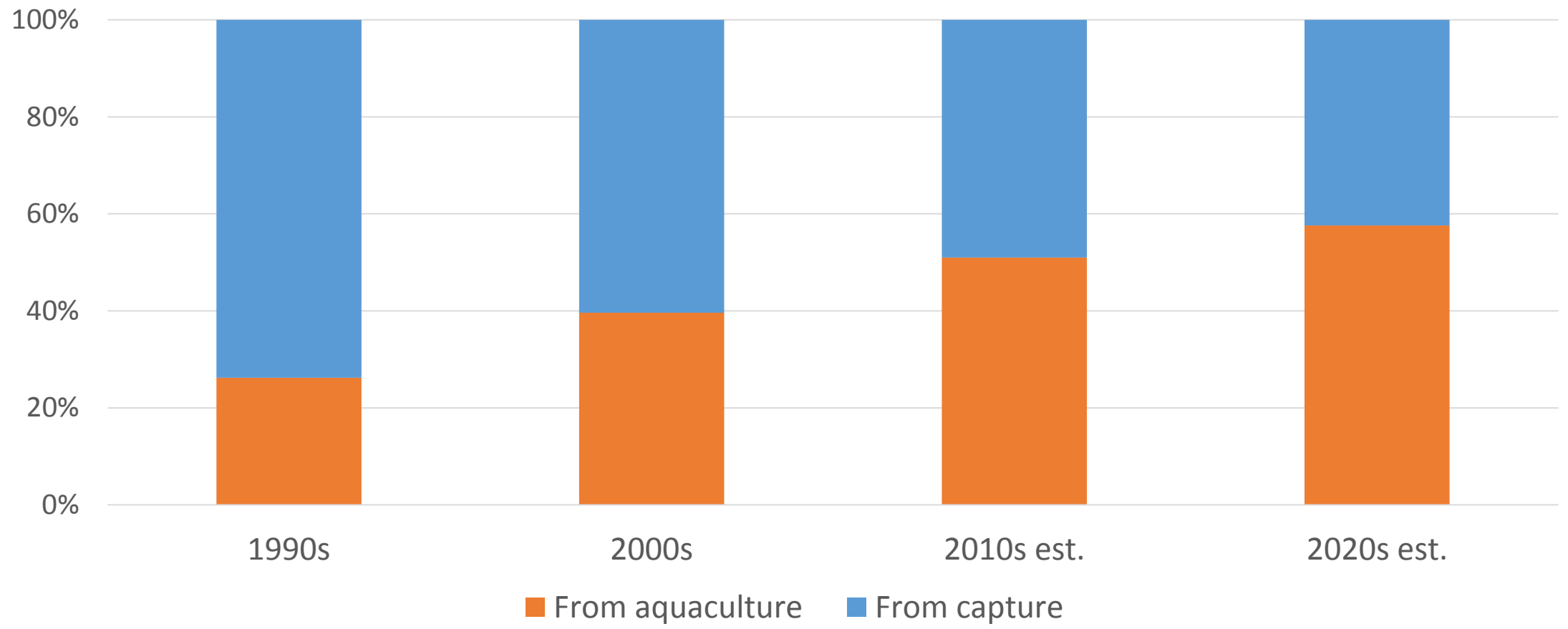
# Fish contribution to human nutrition

2013 data



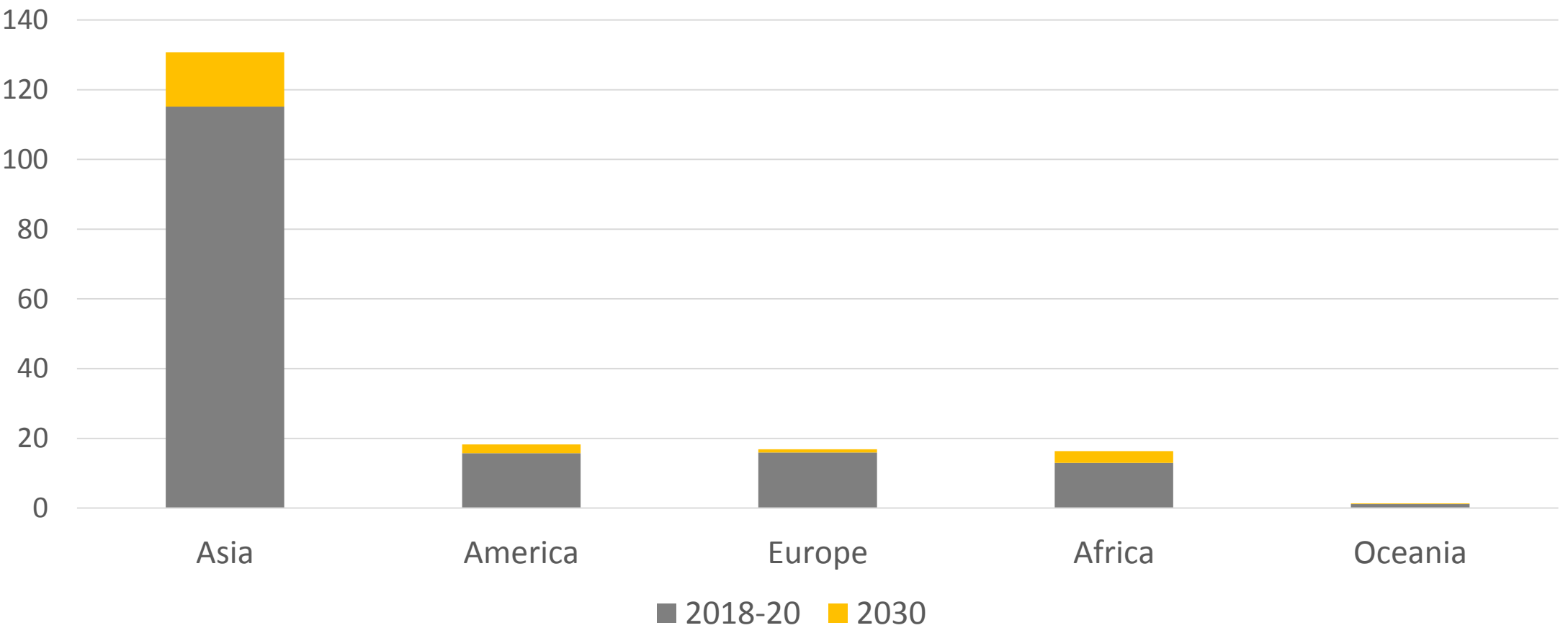
# Increasing role of aquaculture in global fish consumption

Share of fish originating from capture and aquaculture in total fish for human consumption by decades – (%)



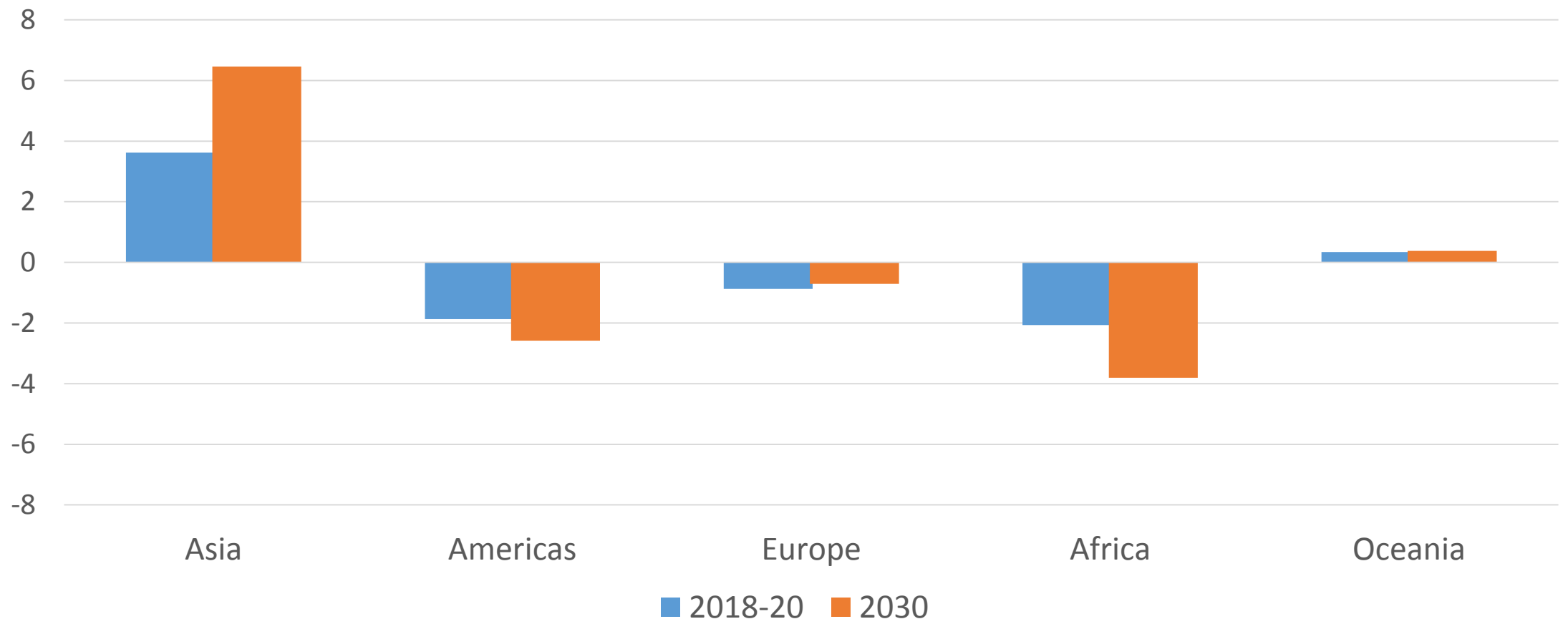
# Asia to drive fish food consumption growth

Fish food consumption - Million tonnes (live weight)



# Asia will continue to be the main exporting continent

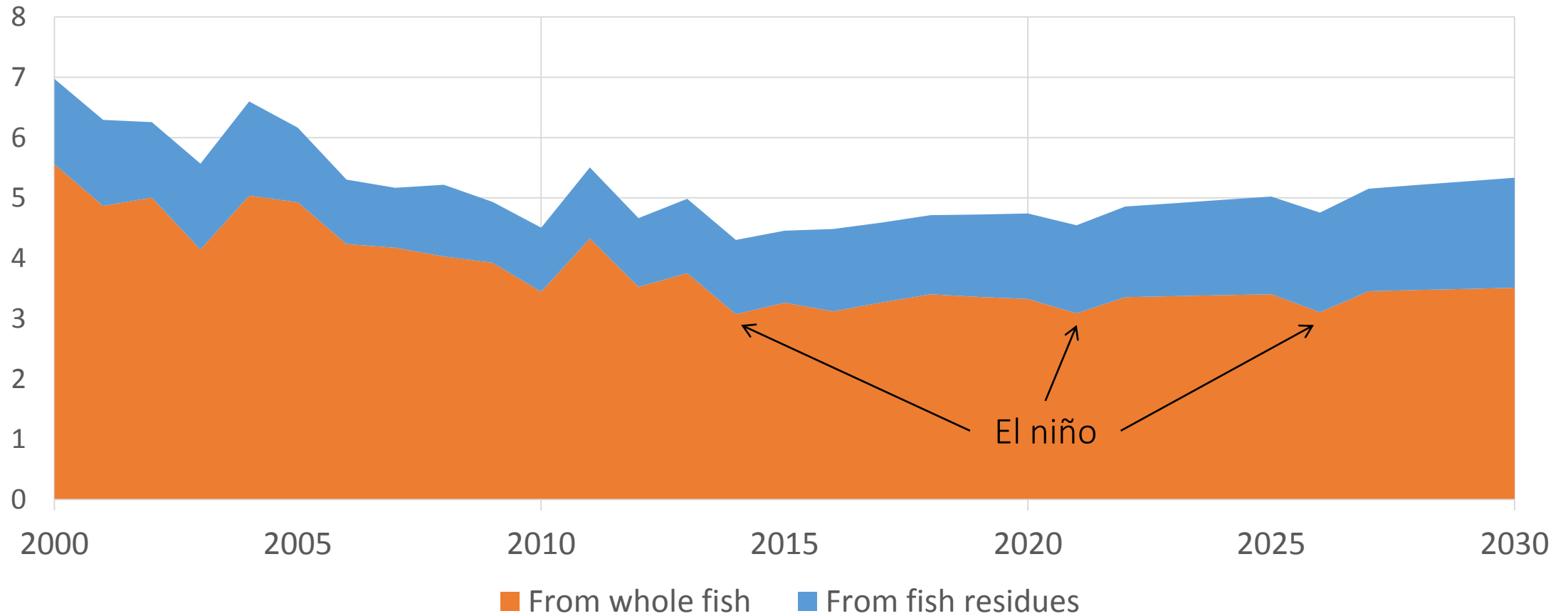
Net trade – Million tons (live weight)





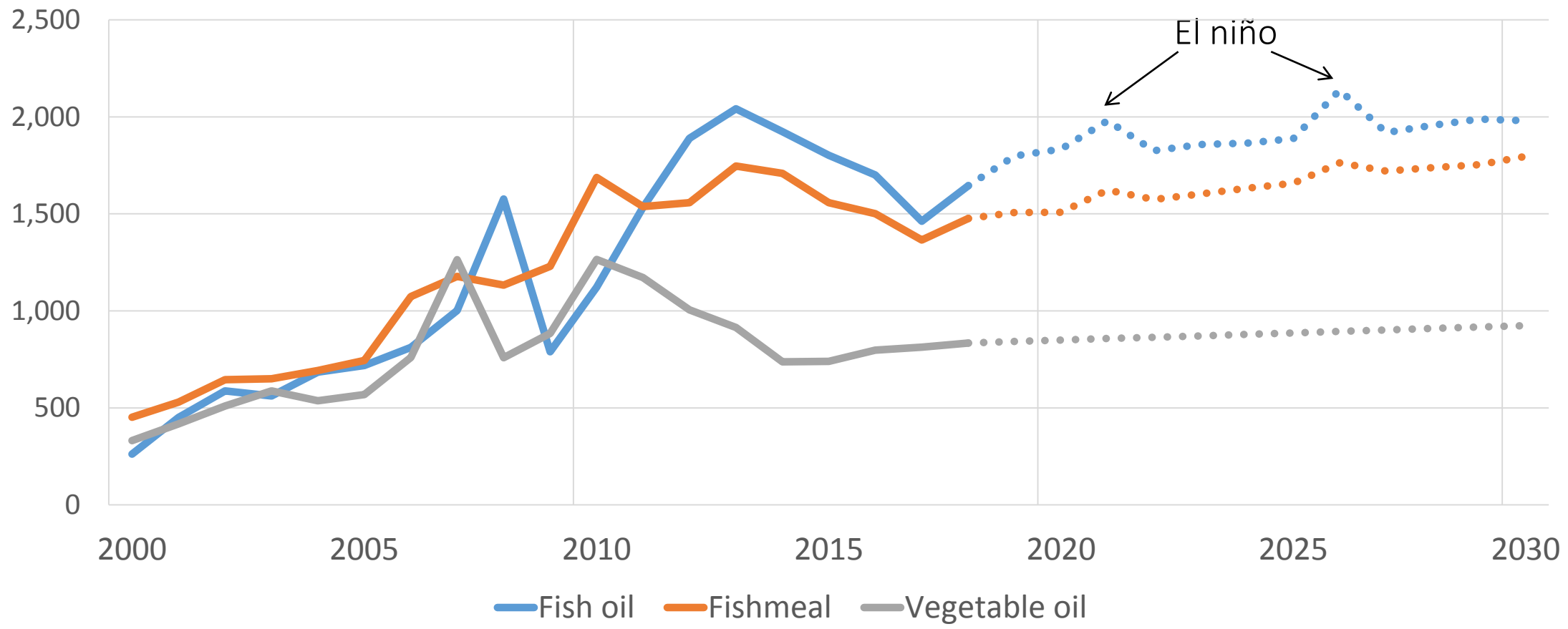
# More fishmeal produced from residues

Million tonnes (product weight)



# Fishmeal, fish oil and vegetable oil prices

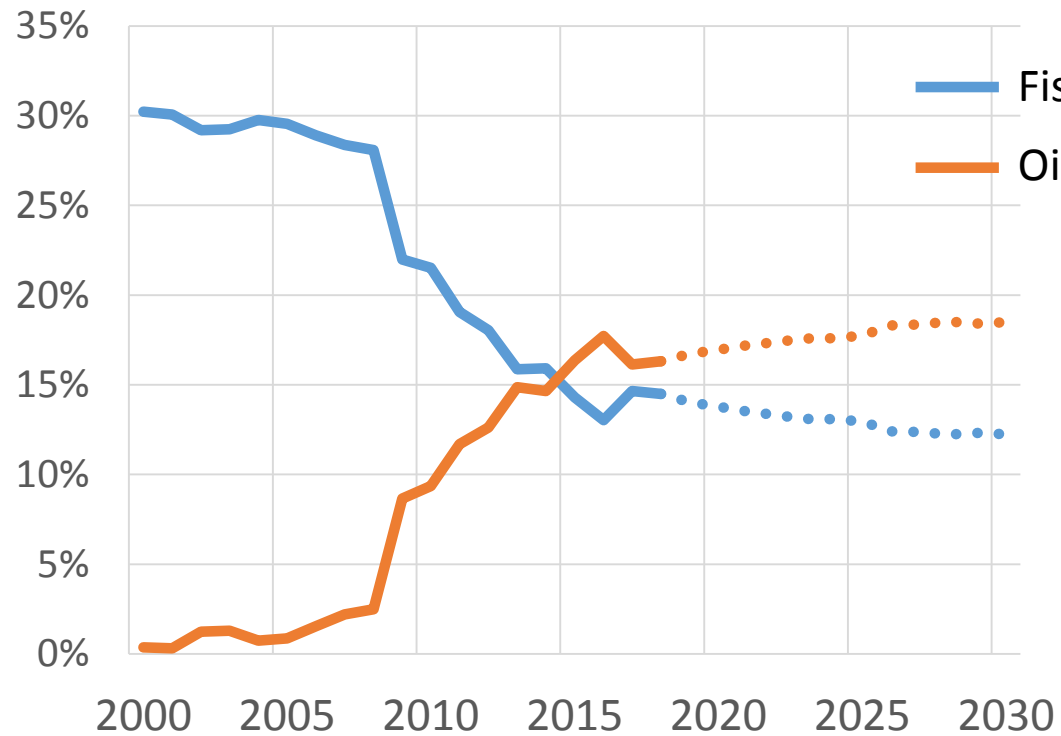
Nominal prices - USD/t



# Share of fishmeal in feed ratio

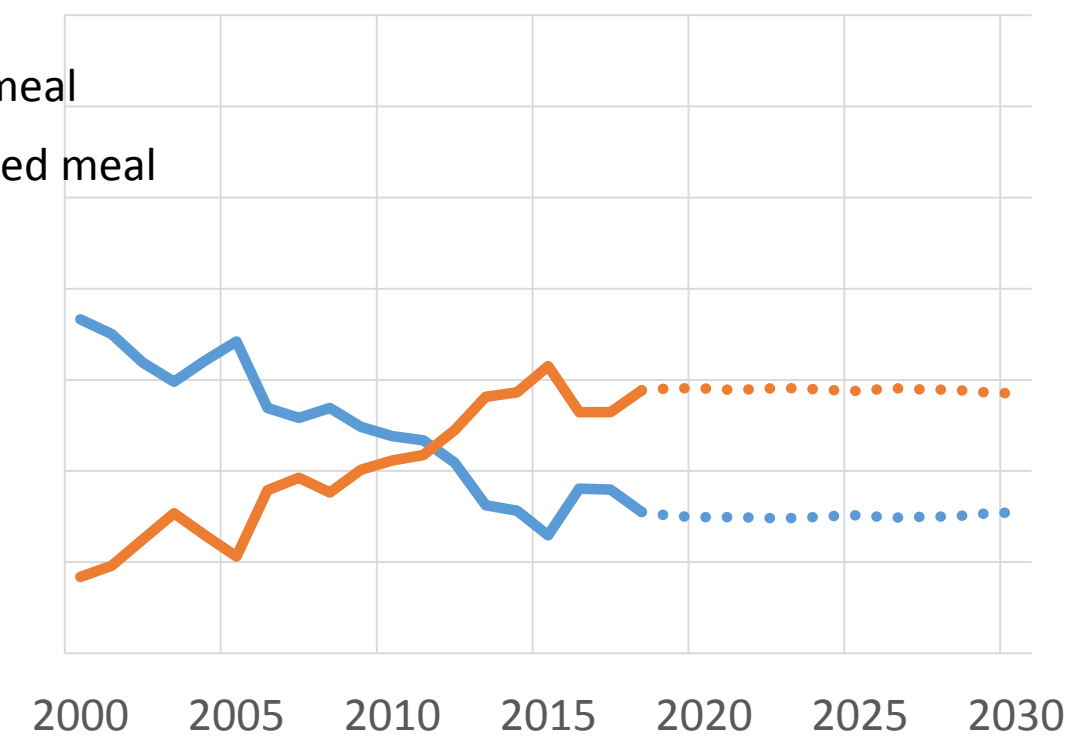
## Salmons and trouts

World average



## Shrimps and prawns

World average



# Uncertainties

- Aquaculture:
  - Availability of sites and water resources
  - Diseases
  - Technology, financial resources, regulations
  - Climate change
  - Genetic improvement
- Trade and consumption
  - Trade policies, market access, trade agreements
  - Food safety and traceability

# New OECD-FAO Agricultural Outlook

- To be released in July 2019
- Special chapter on Latin America and Caribbean



# Thank you for your attention

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