

Overview of Global Surimi Market and Production

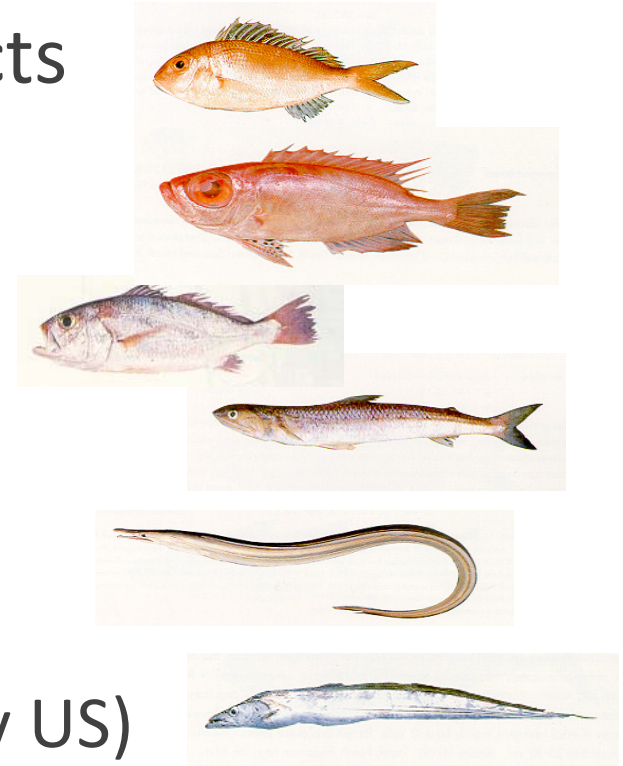
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Surimi...

- Value-added products
 - Low value/price fish
 - White meat
 - Un-utilized fish
- World Production
 - 5.5~600,000 MT
 - (Alaska Pollock 25% by US)





Current Situation – Demand and Production

- Estimated surimi consumption
 - Japan 350,000 MT
 - Others 250,000 MT
- Increased world market, i.e. EU and Southeast Asian
- Major exporting of SA & SEA Countries: Thailand, India, Vietnam, and Malaysia
 - Raw materials Thailand → Japan approx. 65,000 MT per year (Nov, 2008)
 - Japan: 10~20% cheaper to buy from India and Vietnam



Global Surimi Raw Materials

Supply of Fish Stocks – Decreasing

- Declining coastal fishery resources
 - Overfished
- Increasing...
 - Domestic consumptions
 - Environmental concerns (short-term)
 - Concerns on sustainable development and management of fishery resources, and conservation (short-term)
 - Fuel cost (long-term)



Global Surimi Raw Materials ***Demand – Stable or Increasing***

Population growth, consumers
increasing on frozen products, etc.

however...

- Global economical crisis
- Higher price of the fisheries and related products



Current Issues

- Potential (new) species from the unexploited fishing areas/grounds could be further determined, considering low-valued fish, white-meat, utilization of trash fish?, deep-sea resources ?
- National government should play important role ? (updated information and data in each country, negotiation, etc.);
- How to enhance and strengthen coordination and collaboration work and sharing of information between the government and private sector that will be benefit to the exporting countries.

Major Constraints for Seafood Exporting Countries

- IUU (ineffective of flag state, port state, other measures...)
 - EU Catch Certification (1 January 2010)
 - US Catch Certification (2012 ?)
 - Korea, Japan, etc. (within few years)
- Eco-labelling scheme
- Etc

