

Present Status, Challenges and Outlook of Marine Farmed Fish in Asia: A Digital Transformation

**Shirlene Maria Anthonysamy
INFOFISH**

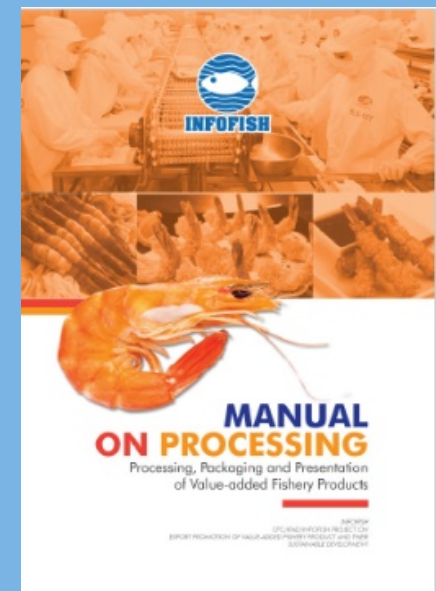
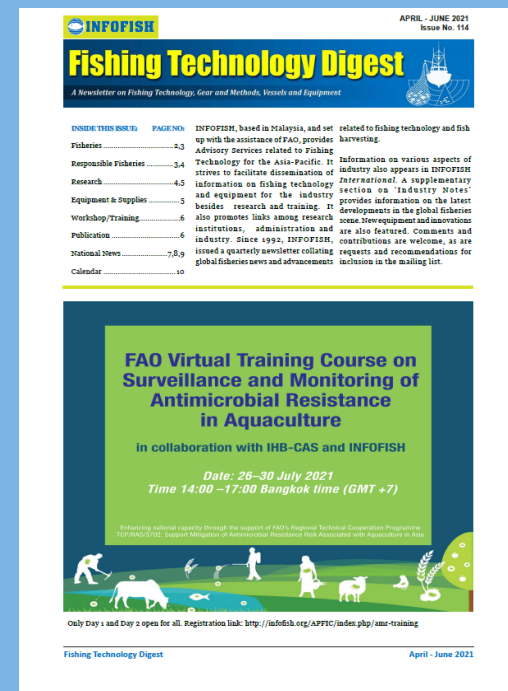
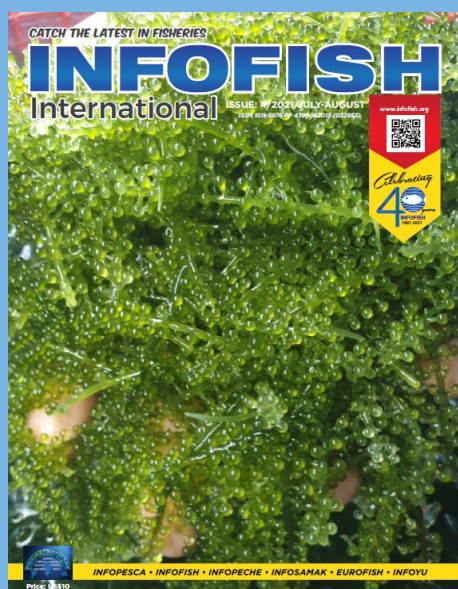
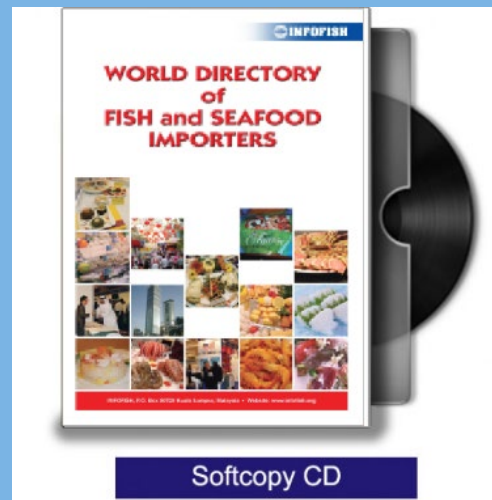
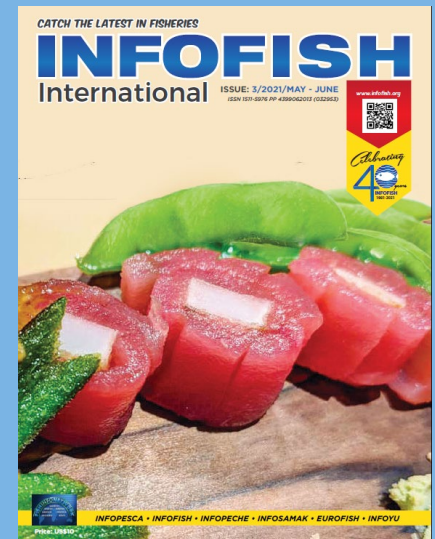
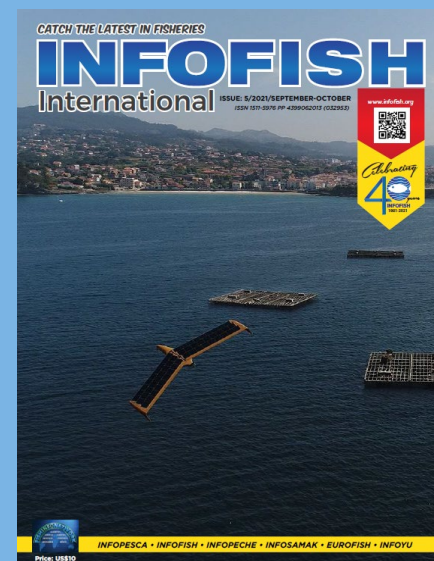
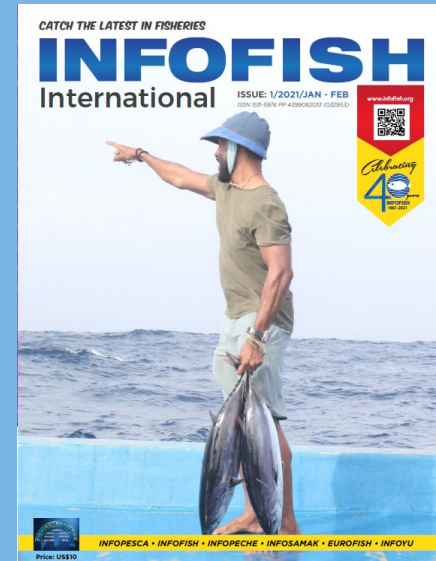
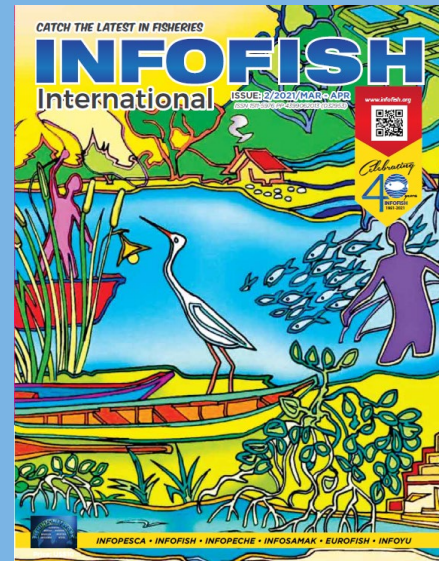
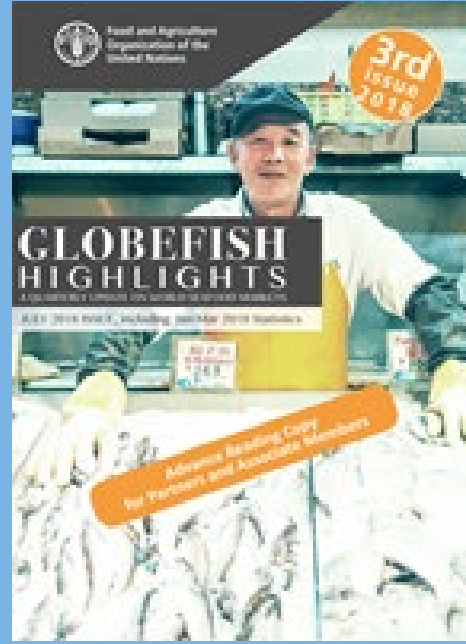
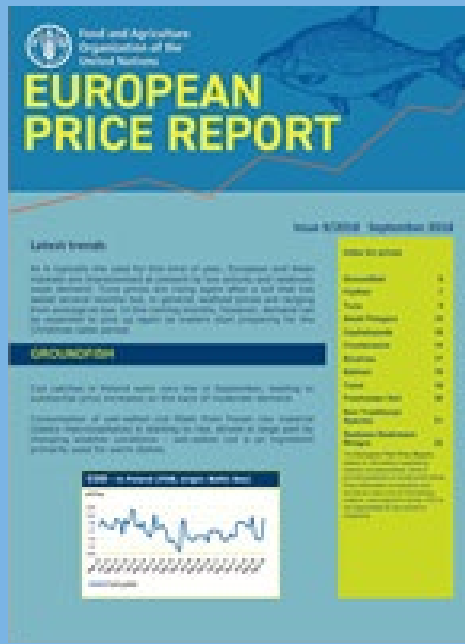


- INFOFISH is an Intergovernmental Organization set up by FAO for marketing information and technical advisory services for fishery products in the Asia Pacific Region and beyond.
- Based in Kuala Lumpur and hosted by Malaysia since its inception in 1981, INFOFISH has as its members: Bangladesh, Cambodia, Fiji, Iran, Malaysia, Maldives, Pakistan, Papua New Guinea, Philippines, Solomon Islands, Sri Lanka and Thailand.
- Training programmes, workshops and seminars, organization of conferences, and by executing a variety of projects in the fields of trading and marketing, processing, aquaculture and fisheries.



Website: <http://infofish.org/v3/>



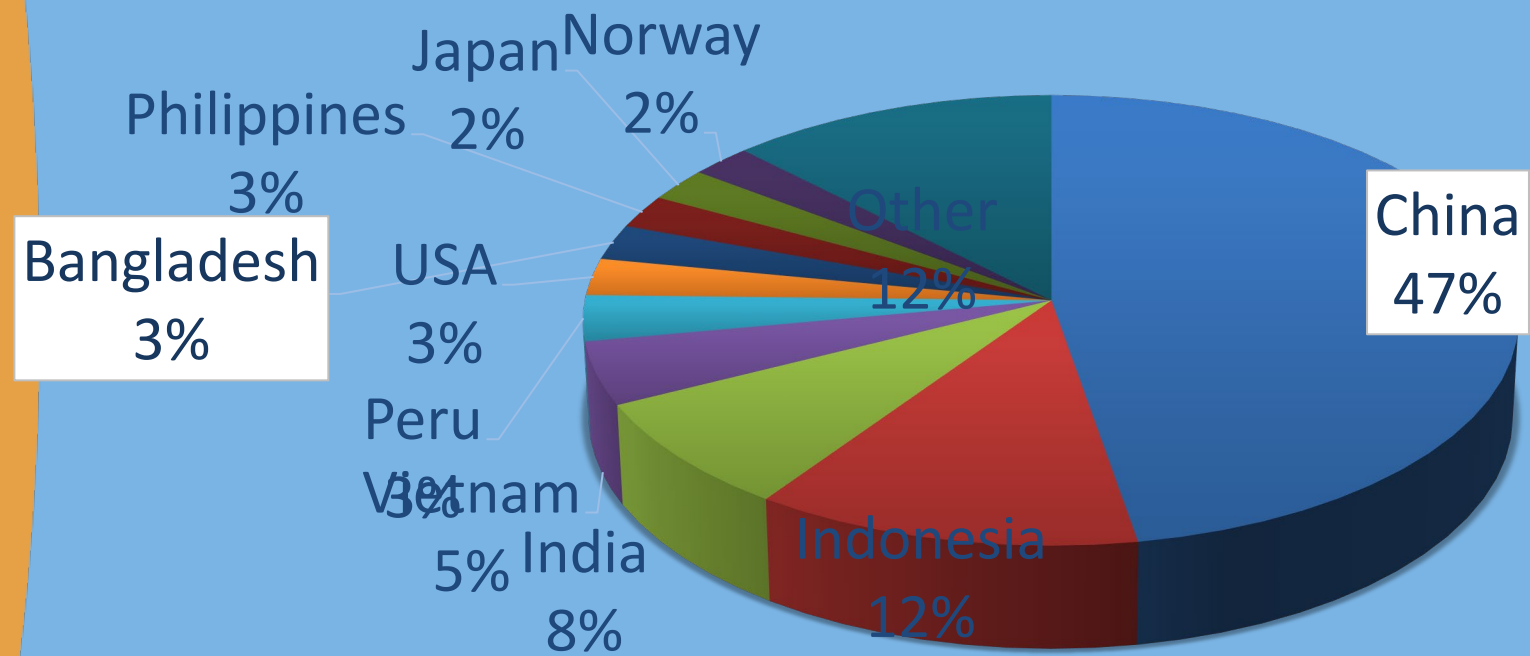


PREAMBLE

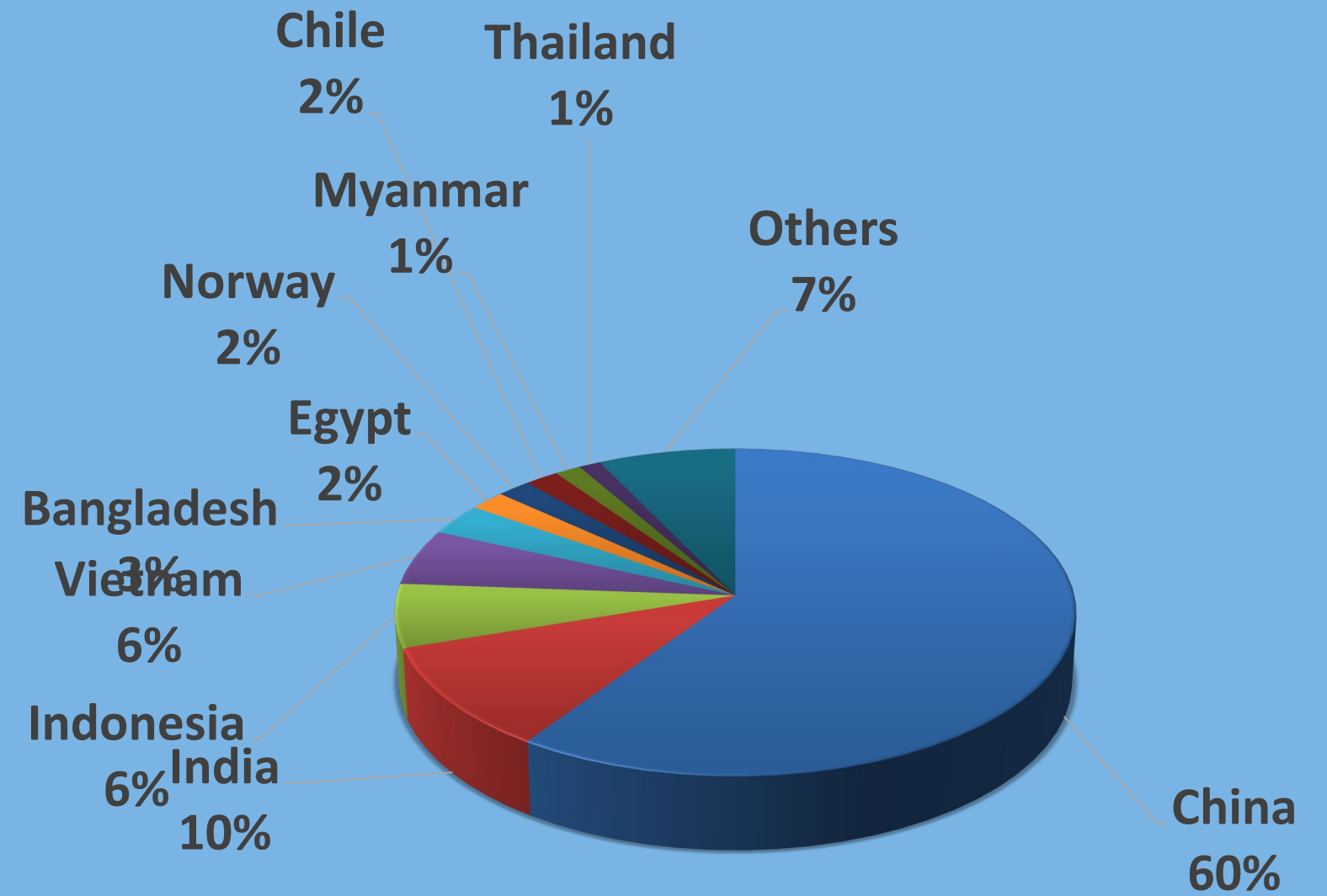
- Changing landscapes in 2022 with the lessening of the pandemic effects
- Businesses are returning to almost normal levels
- Recovery in foodservice, travel and tourism, distribution channels
- Pandemic served as a catalyst for various innovations in delivery, sales, marketing and products: expected to stay on
- Prices are rising with the new change and boost in sales
- On the downside, the war in Ukraine and the Russian Federation brings about concerns and uncertainties
- Trade sanctions and boycotts of Russian products imposed by governments and businesses – developing new trade routes
- **Domestic demand also increased in many producing countries, where local prices are often better compared with export prices.**



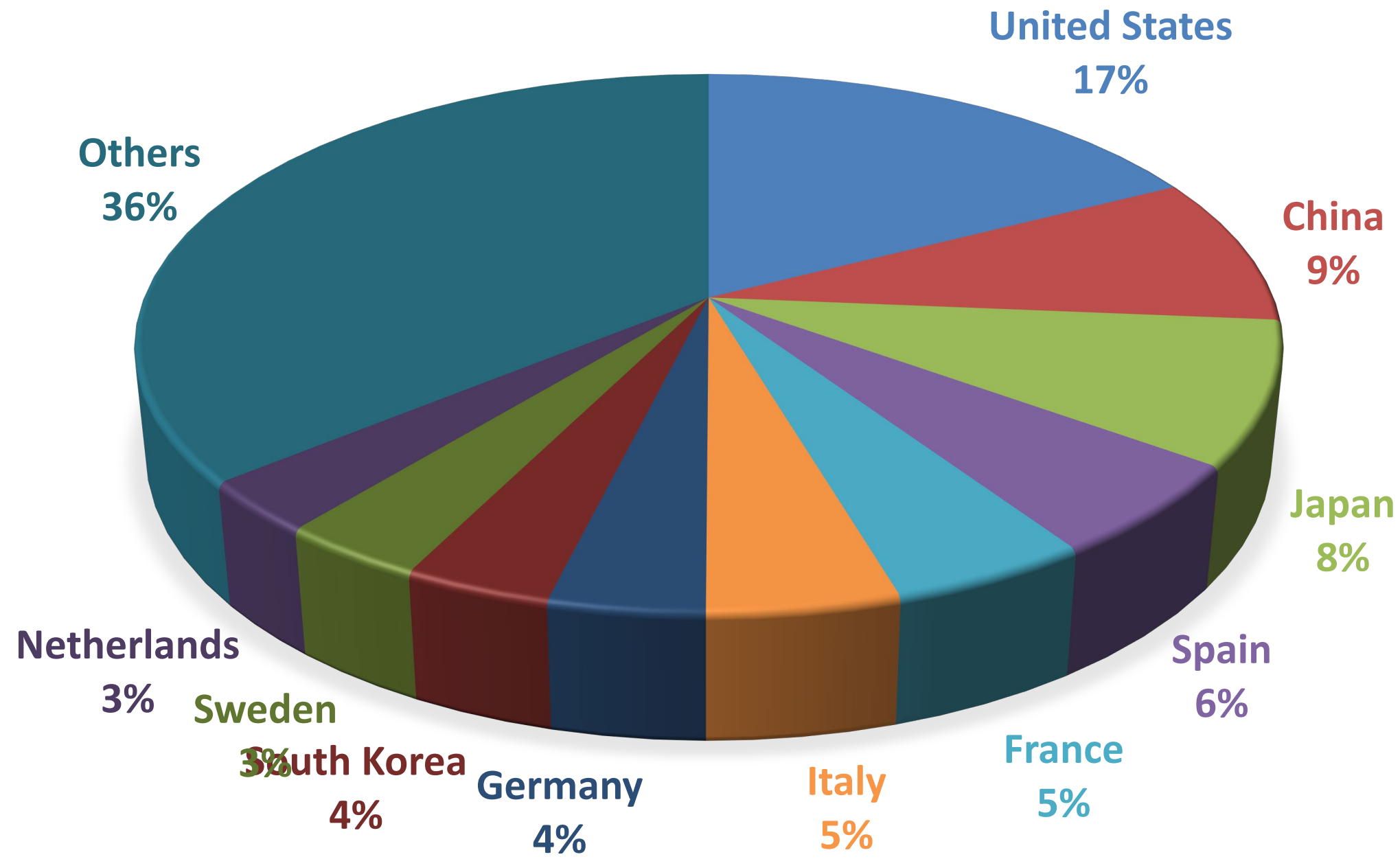
Global Fisheries production 2020 by Volume



Global Aquaculture Production 2020 by Volume (excluding aquatic plants)



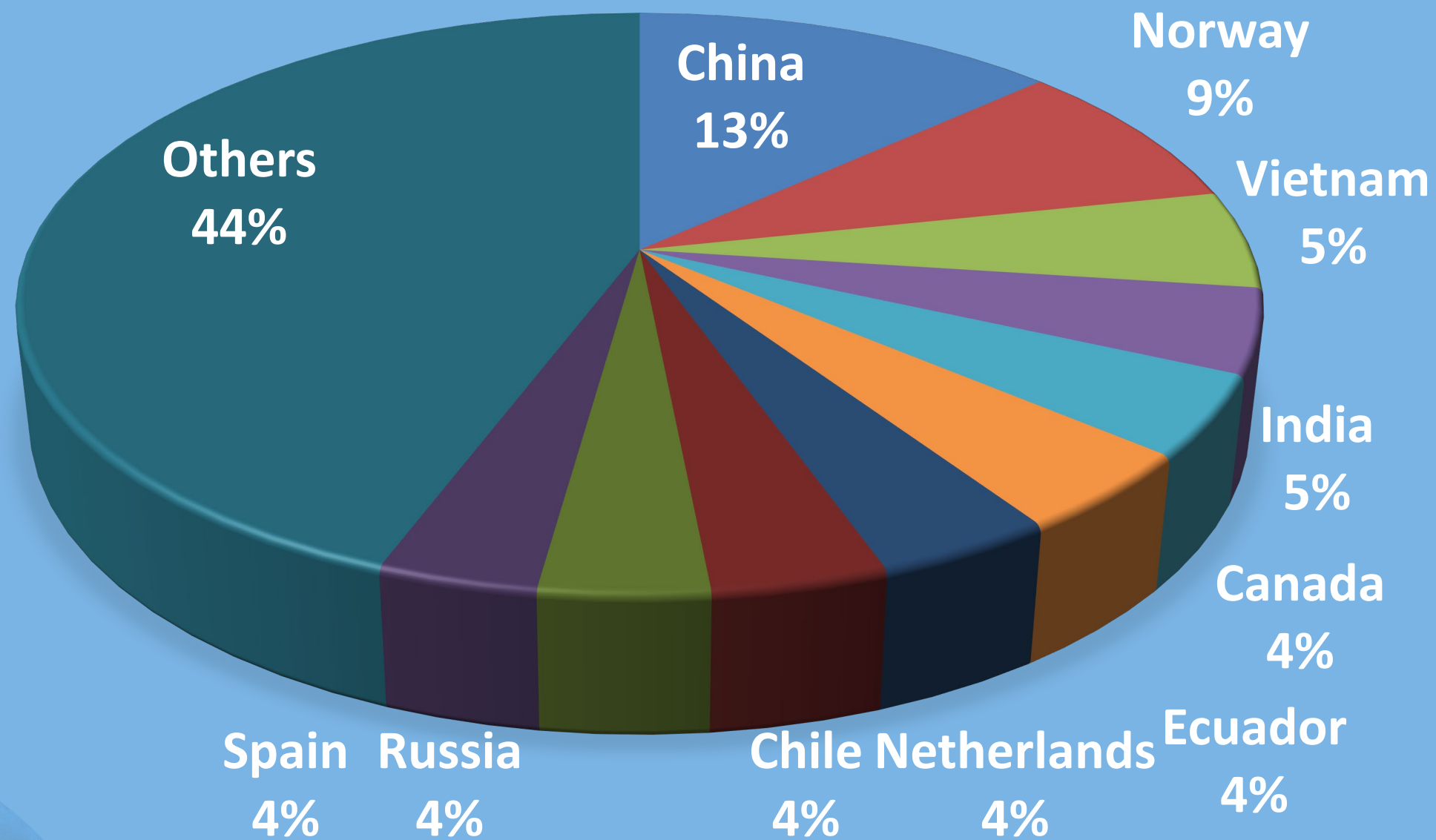
WORLD FISHERY IMPORTS (IN VALUE) 2021



- International seafood imports in 2021 increased by 15.85% compared to the decline of 7.26 during the previous reporting period
- Top importers of fish and fishery products by value - USA, China, Japan and Spain
- China moved up as 2nd largest importing country



WORLD FISHERY EXPORTS IN VALUE, 2021



- Revival of the food service sector
- Fishery exports up by 16.85% compared to 7.19% decline in 2020
- Exports increased from most exporters
- Exports by Asia countries increased by US\$5.42 billion



ASIA : Producer and Market

- Over the last few years, demand for foodfish including imports showed steady growth when in many traditional western markets the growth rates were negative.
- Besides increasing fish prices, higher imports of high value fishery products mainly of coldwater species.
- Focus on popular imported products: Salmon, bivalves, cod, lobster
- Imports of pangasius catfish fillet increased over the past decade by 810%.



Asian market absorbs more high value seafood compared to anywhere else in the world

- Domestic markets in Asia have developed significantly in the past decade
- Improved cold chain, distribution and marketing systems + the supermarket culture, have supported higher fish consumption in many domestic markets, including in places where fish has not been popular
- Demand in the retail and catering trade takes away supplies from export markets
- Most importantly, rising fish price did not have much negative affect on the consumption growth



Fish sold through wholesale markets, supermarkets, wet markets, night markets



Product freshness and presentation sets the price



High value products taking more shelf space



Value Add for better Access



Consumers willing to pay premium prices for quality products

| Live seafood | RM/kg | US\$/kg |
|-------------------------------------|----------|---------|
| Silver Pomfret | 65 | 15 |
| Wild Sea Grouper | 185 | 43 |
| Black tiger | 115 | 54 |
| California geoduck | 268 | 62 |
| Giant Boston Lobster | 278 | 64 |
| Canada Geoduck | 470 | 109 |
| Pangasius | 115 | 27 |
| Red tilapia | 65 | 15 |
| Leopard Coral Grouper (ong sing) | 313 | 73 |
| Humphead wrasse (soo mei) | 570 | 133 |
| Squaretail coral grouper (soi sing) | 243 | 57 |
| Australian abalone (L) | 73/piece | 17/pc |
| Flower crab | 65 | 15 |
| Scotland scallop | 181 | 42 |
| Indonesian Meat Crab | 115 | 27 |



Philippines – A good example of product diversification



VALUE-ADDED PRODUCTS

Ready-to-prepare



SHANGHAI ROLLS



EMBUTIDO NUGGETS



CHORIZO TUNA FINGERS



SIOMAI ROLLS



BURGER PATTIES
TUNO TOCINO



SHANGHAI ROLLS
HOTDOG



EMBUTIDO NUGGETS



CHORIZO TUNA FINGERS



SIOMAI ROLLS



BURGER PATTIES
TUNO TOCINO



In this part of the world...nothing goes to waste!

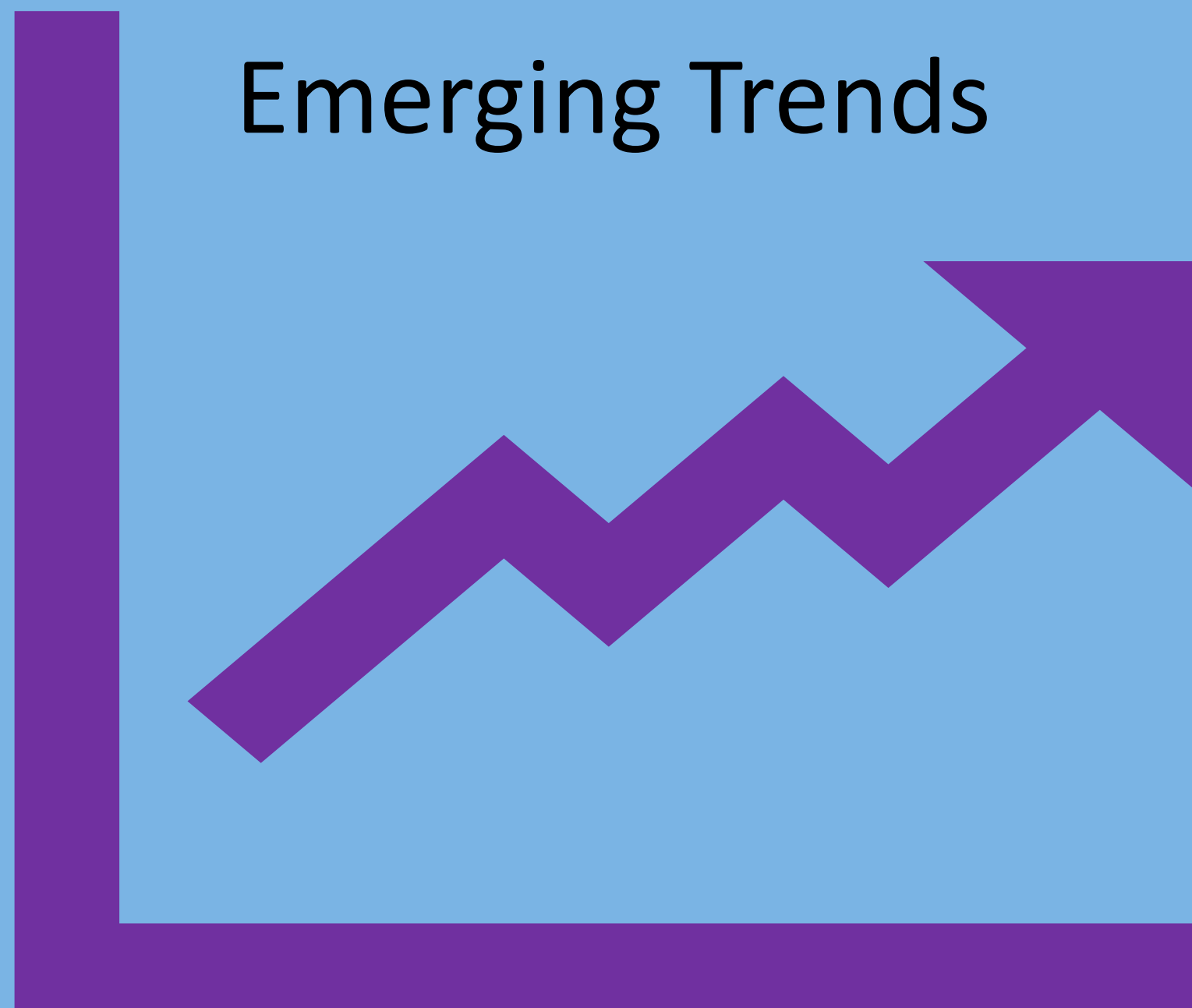
Salmon head



Salmon bones and meat



Emerging Trends



Disruption in seafood supply chain

- Consumers spending to direct channels for seafood dropped due to movement restrictions



- New ways of reaching consumers
- Choice of the seafood formats
 - fresh, frozen, canned
 - shift in consumer preference/ready to eat, ready to cook/ for the elderly
- Increase in usage of online platforms for seafood buying (fresh and frozen products)
- Increase in wholesalers/processors are selling directly to consumers
- Grab food, Shopee, Lazada, Tmall, Ali Baba etc
- Exports of processed, ready-to-serve and canned seafood - highly demand in the retail level





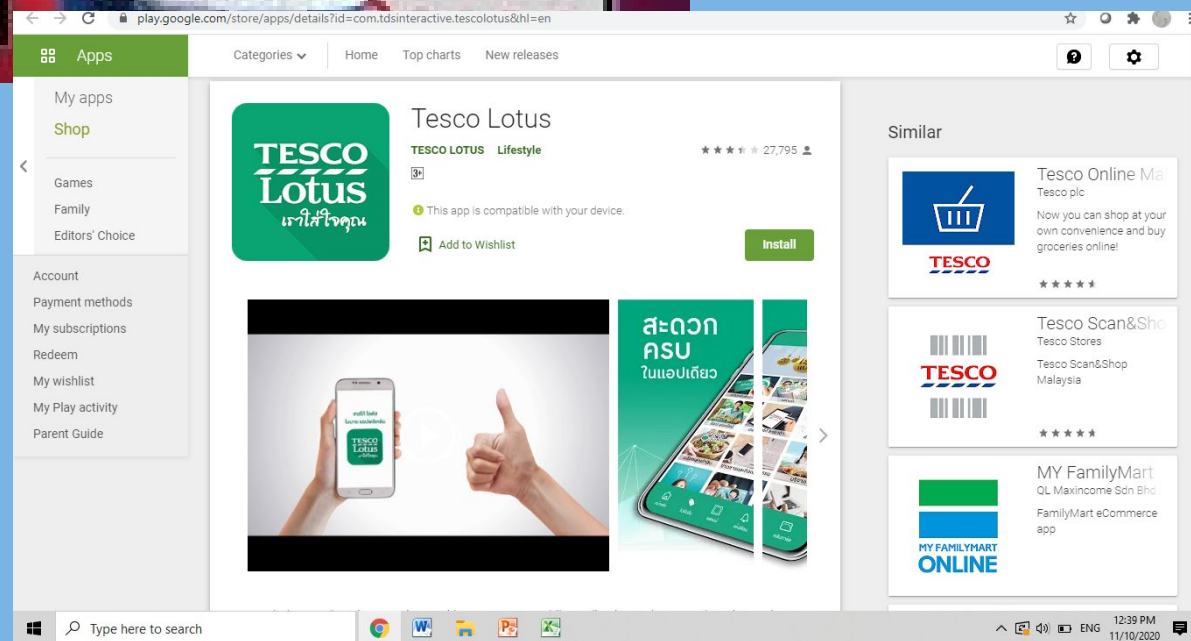
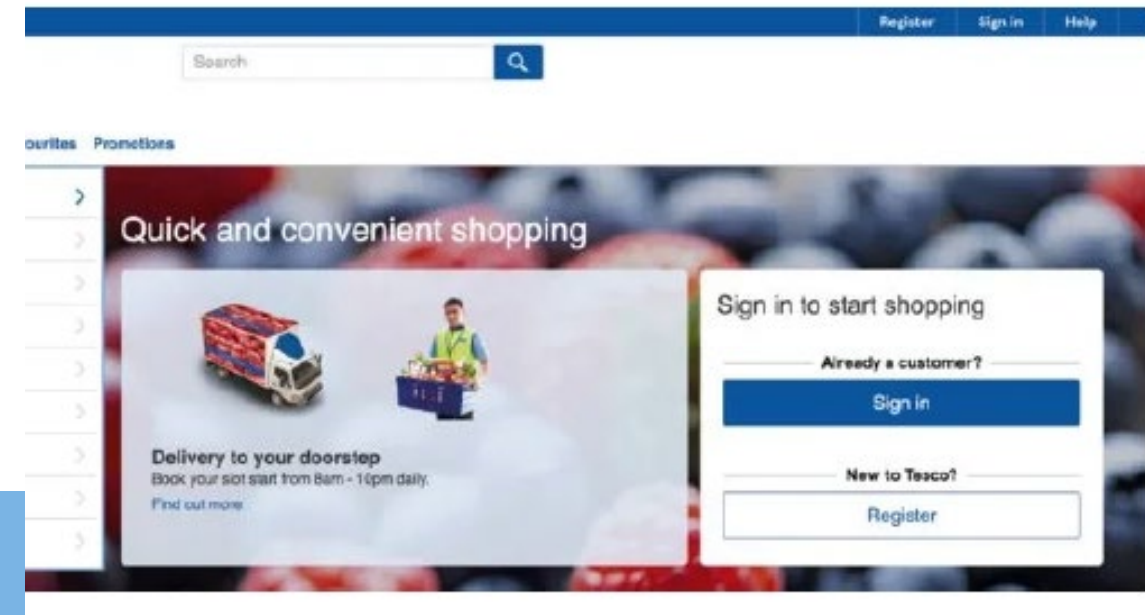
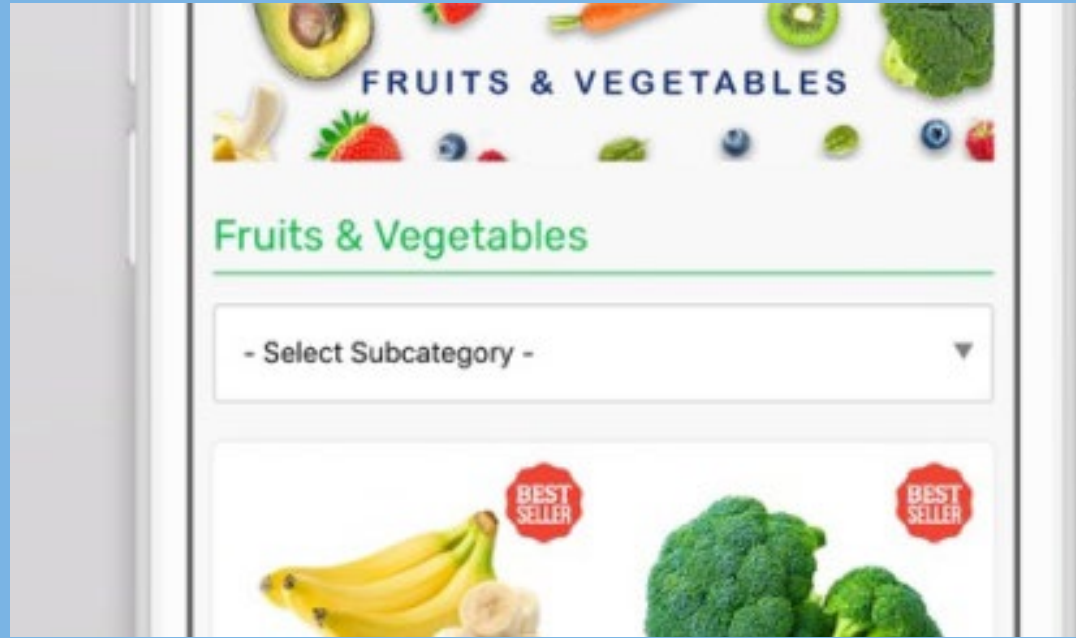
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EngineerBabu

How we Developed a Grocery Delivery App with 1,00,000+ Downloads!

www.engineerbabu.com

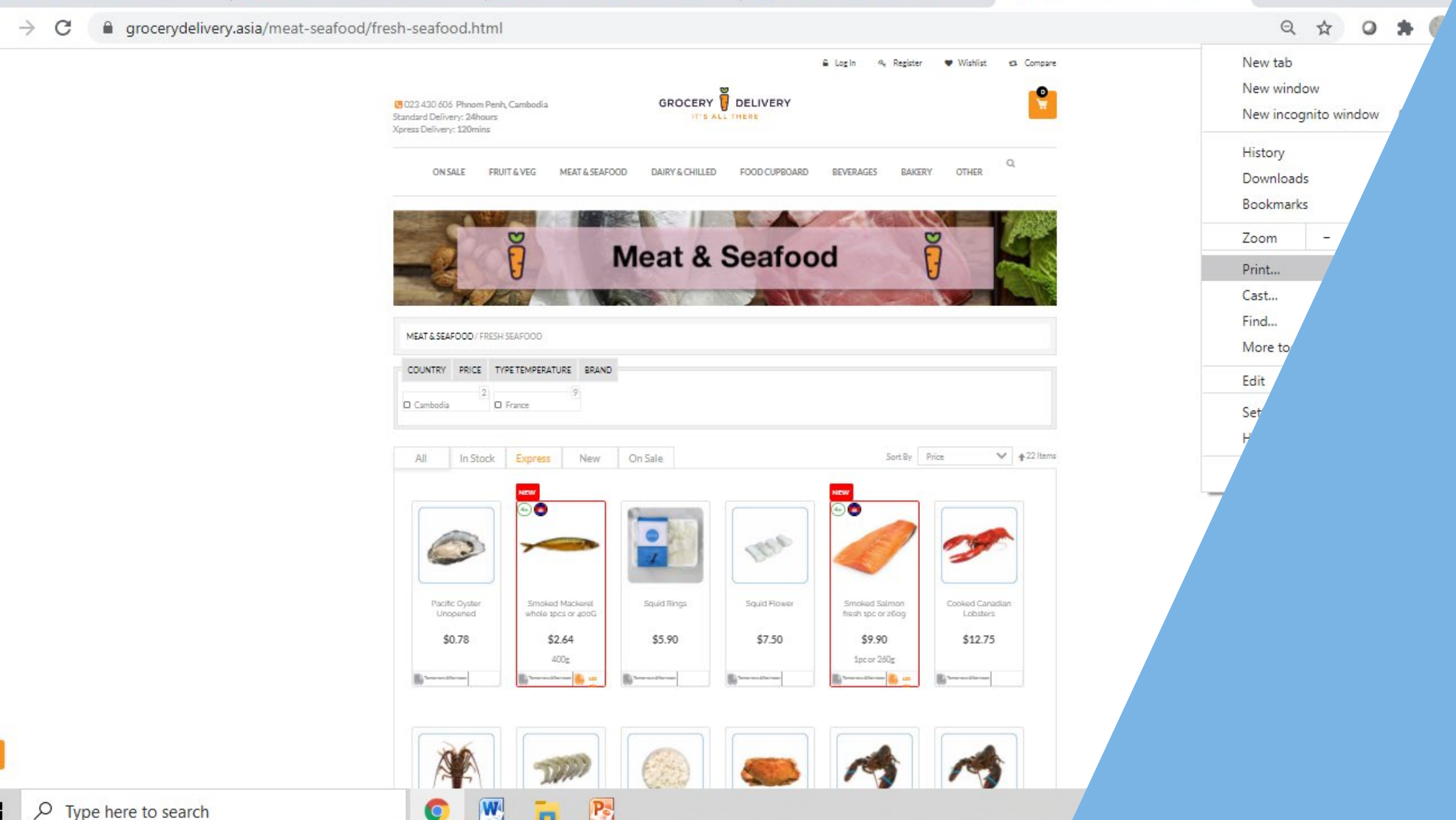
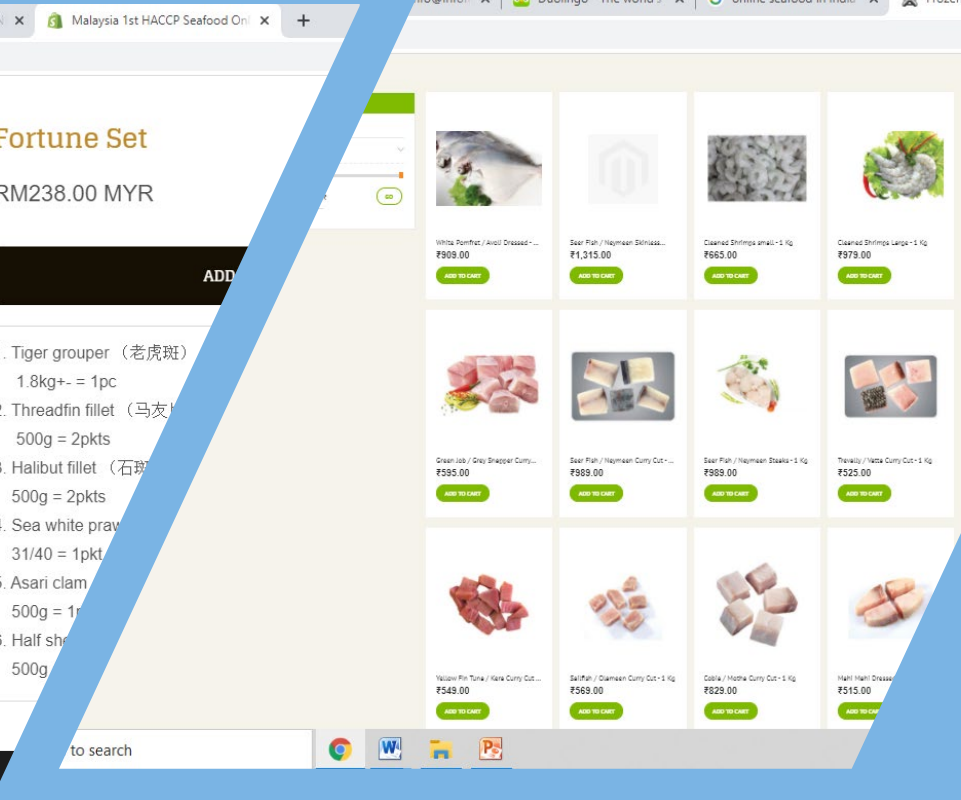
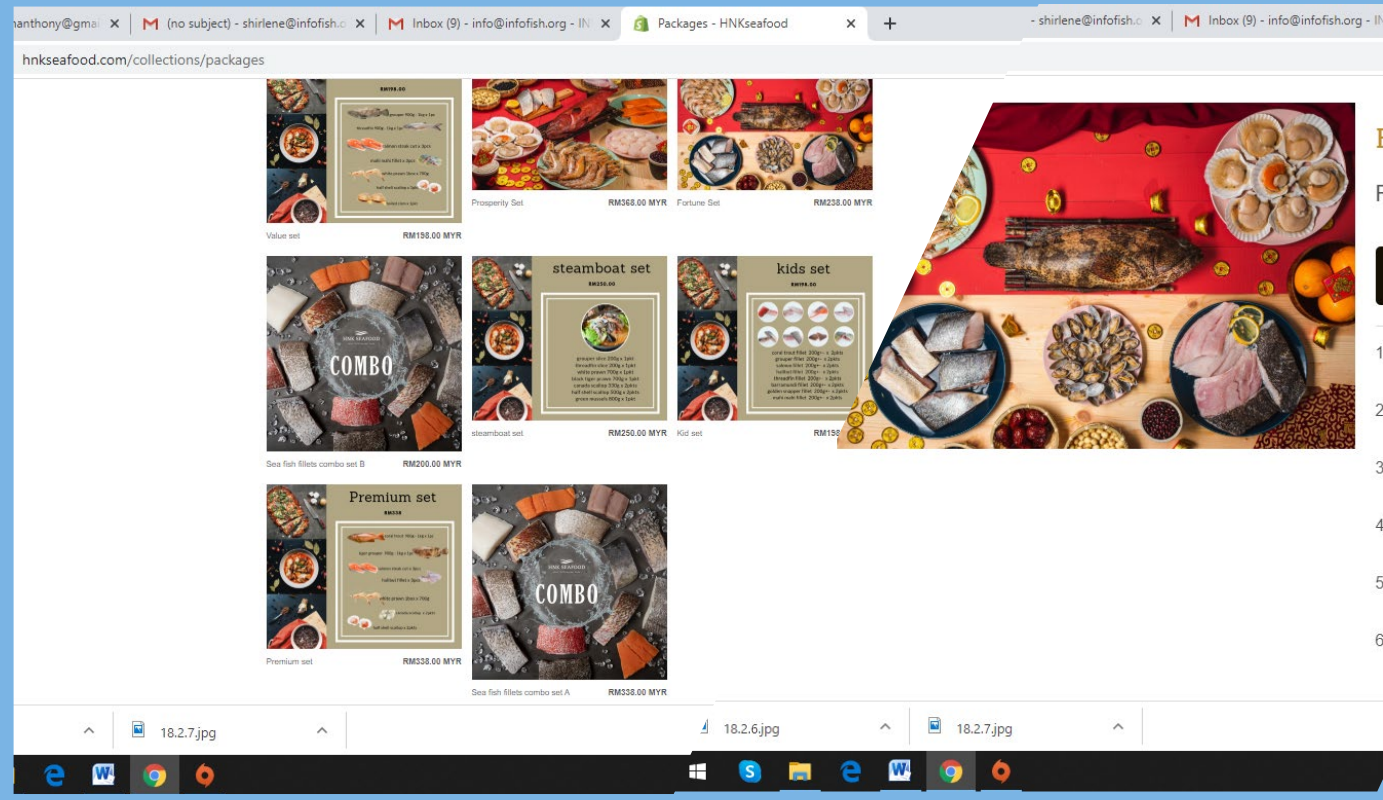
Delivery





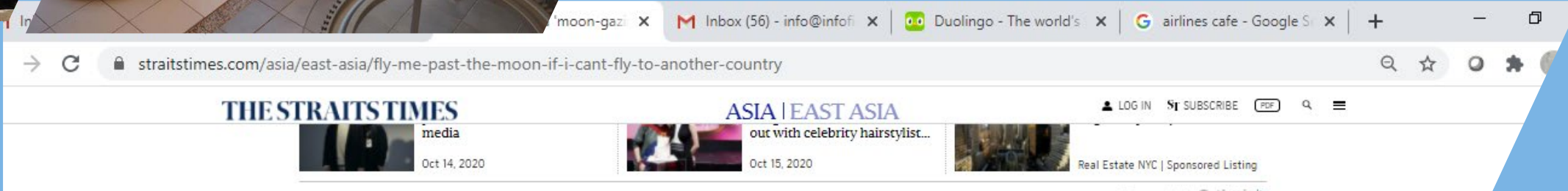
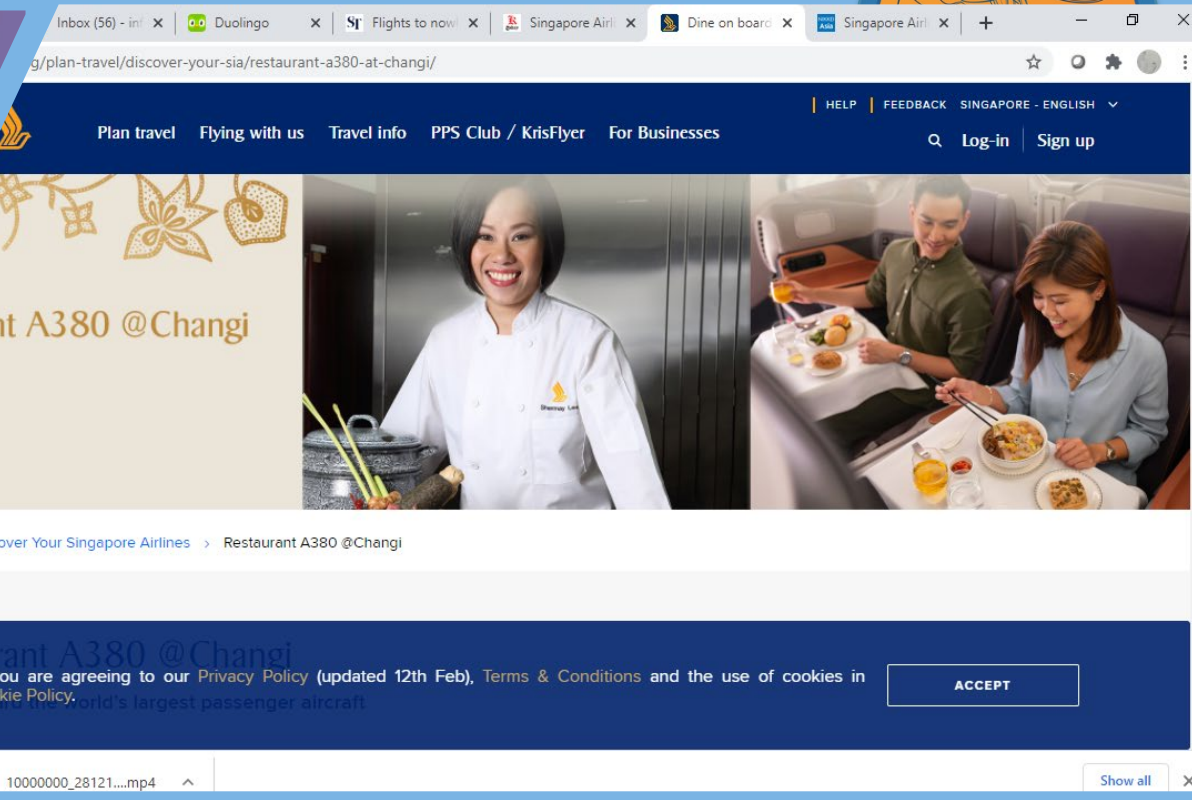
Institutional retailers





Producers/ Processors/ Wholesalers





THE STRAITS TIMES

ASIA | EAST ASIA

COVID-19 SPECIAL On board a 'moon-gazing' flight to nowhere in Taiwan during Mid-Autumn Festival

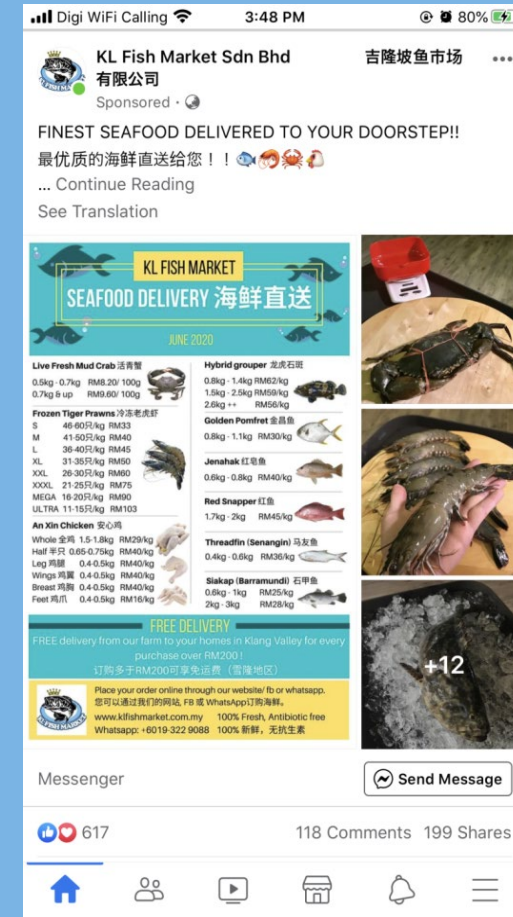
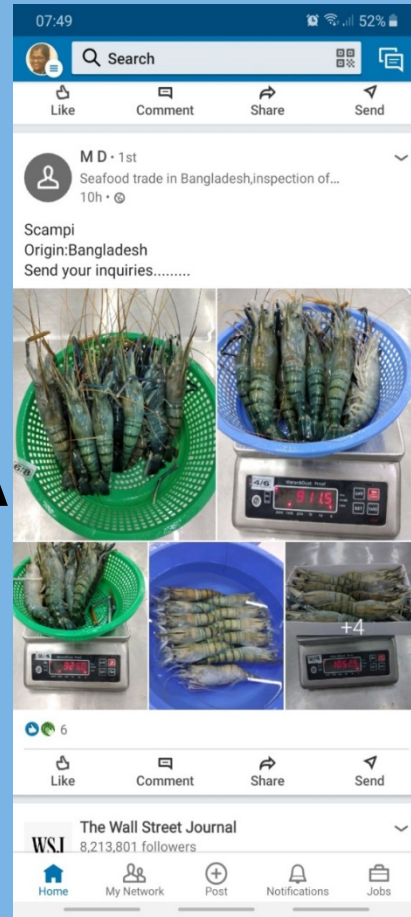


1 of 4 More than 300 passengers were on board EVA Air's Mid-Autumn Festival "flight to nowhere" around Taiwan to get a good glimpse of the full moon.

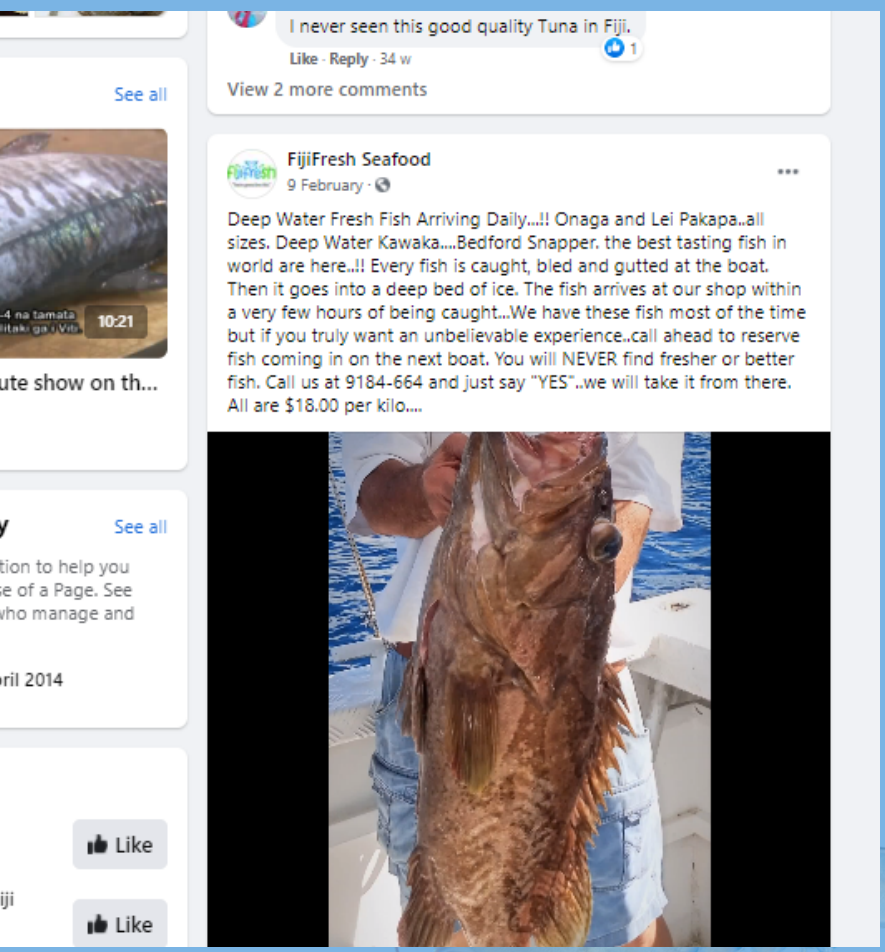
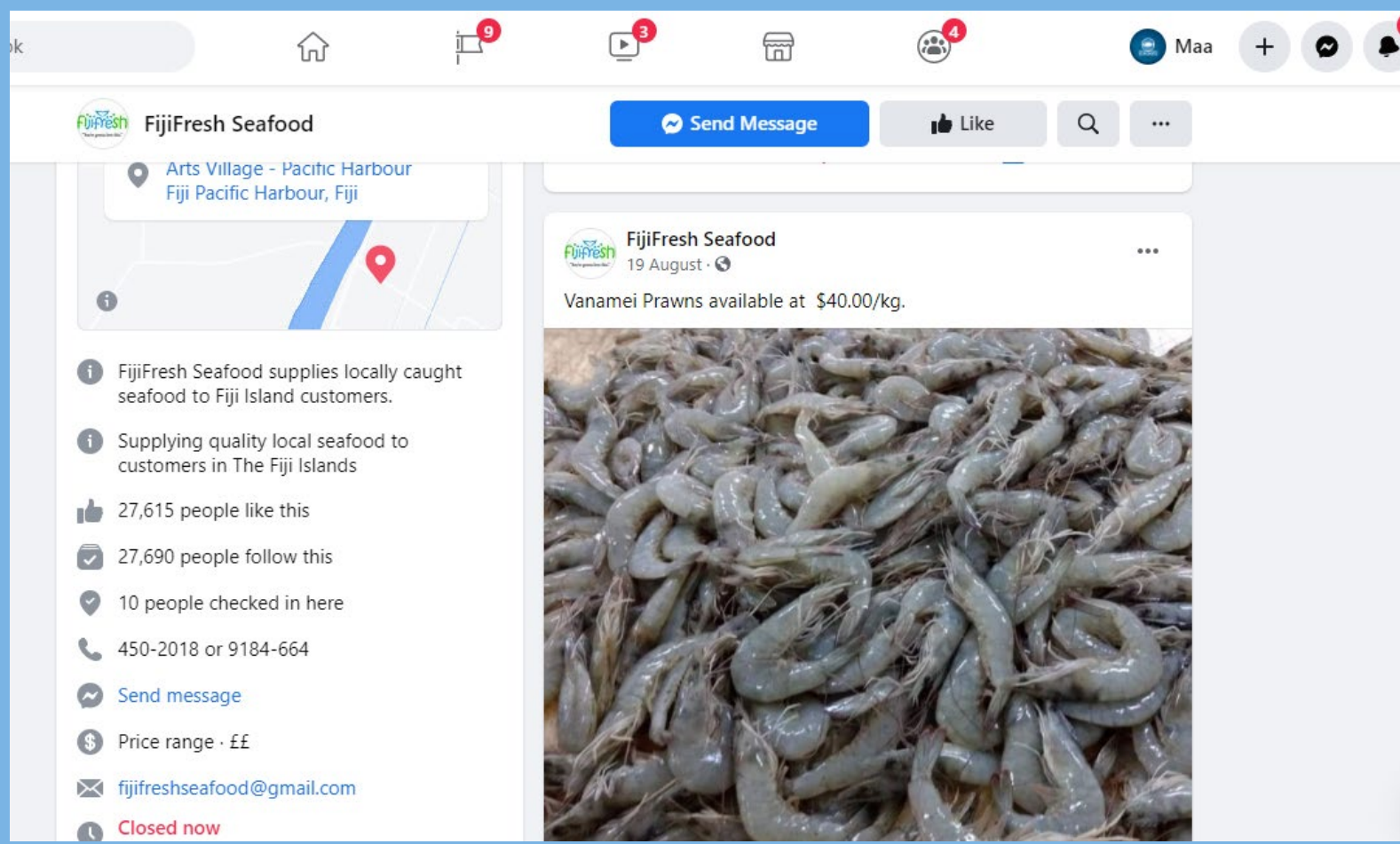
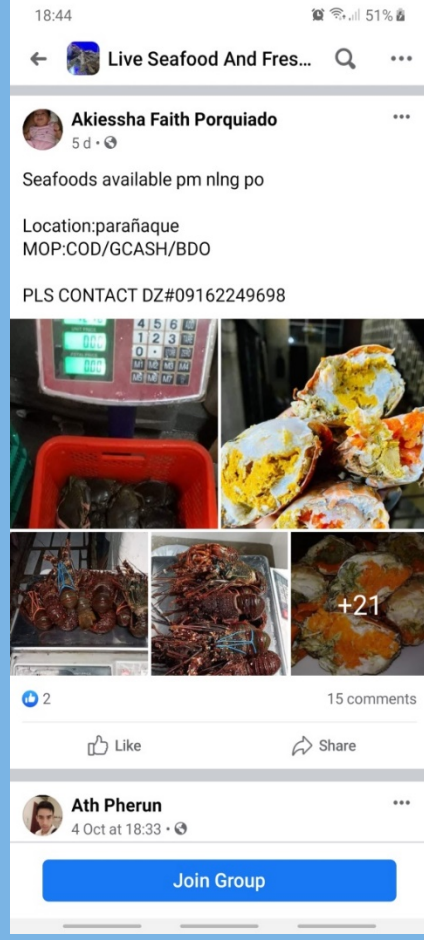
SEAFOOD STILL "ON AIR"



SOCIAL MEDIA



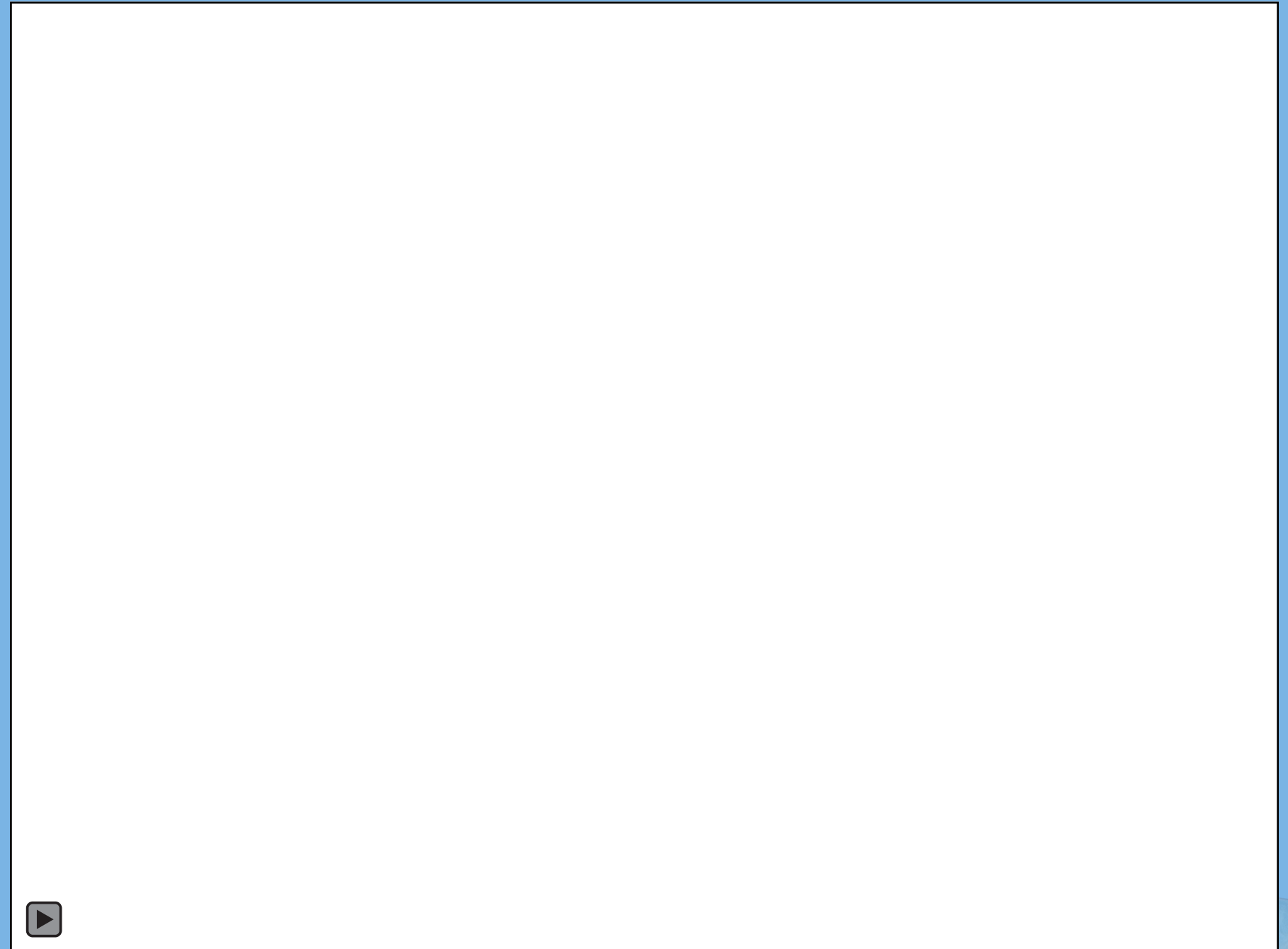
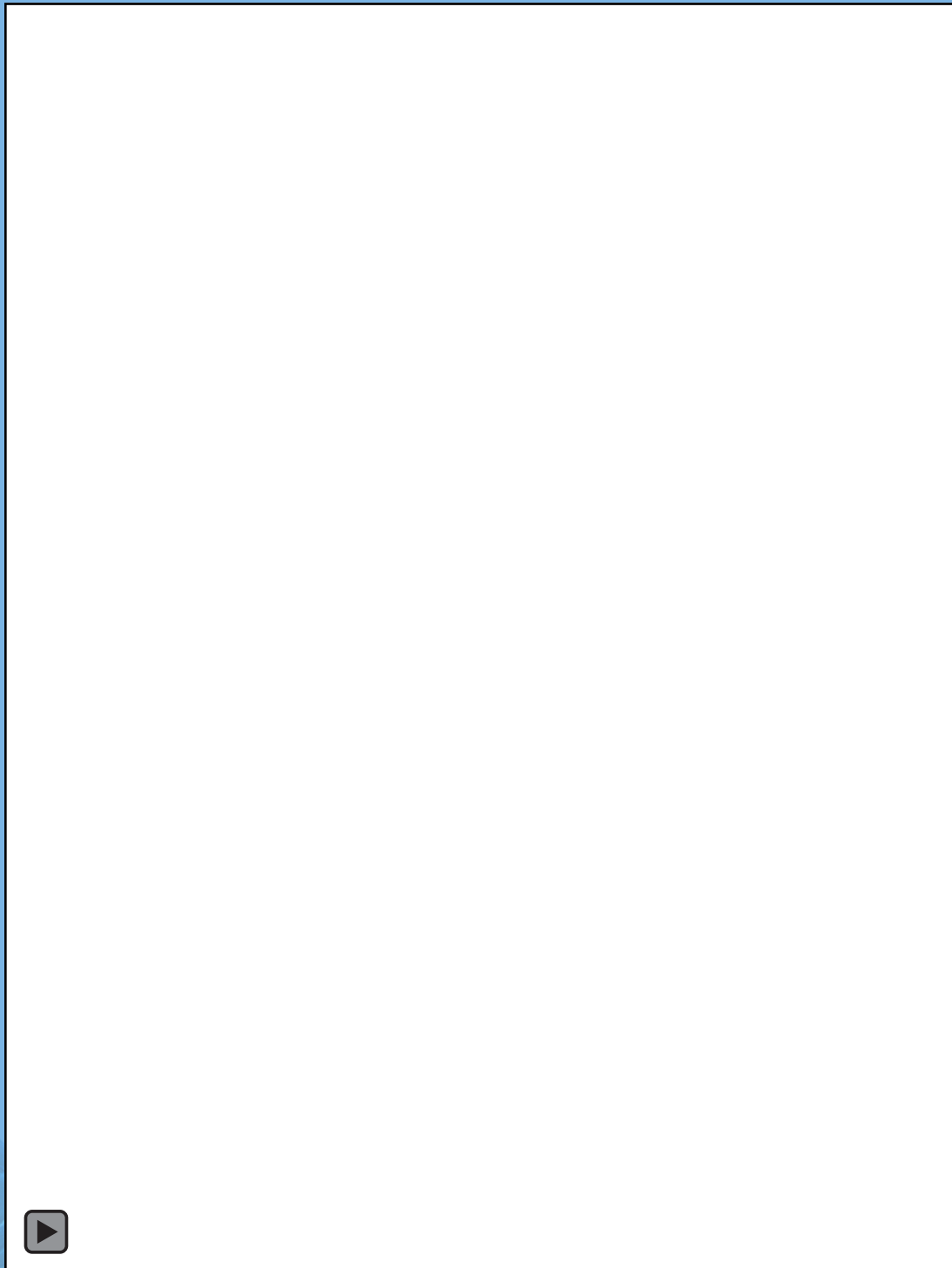
RM69/500g
 **5. Alaskan King Crab Leg RM298/kg
 **6. Unagi with Sauce RM190/kg
 • 360+g per pack (RM68+-)
 **7. Smoked Salmon RM68/450g pack, Norway
 **8. PWP Edamame RM8.00/pack, 500g
 🍄 White Button RM32/kg
 🍄 Swiss Brown RM35/kg
 🍄 Portobello RM40/kg, limited stocks
 🌐 Handling fees RM5 per order
 Kindly PM FB/ WA 012-2912122.
 📄 NO cancellation upon written confirmation.
 Thank you! ❤️
 14:53



ONLINE MARKETPLACE



Digital technology to keep up with the growing demand of a new generation who prefer having their fish packaged and sent to their homes and pay less than they would if they went to a real market



The popularity of salmon to regional marketers and trade

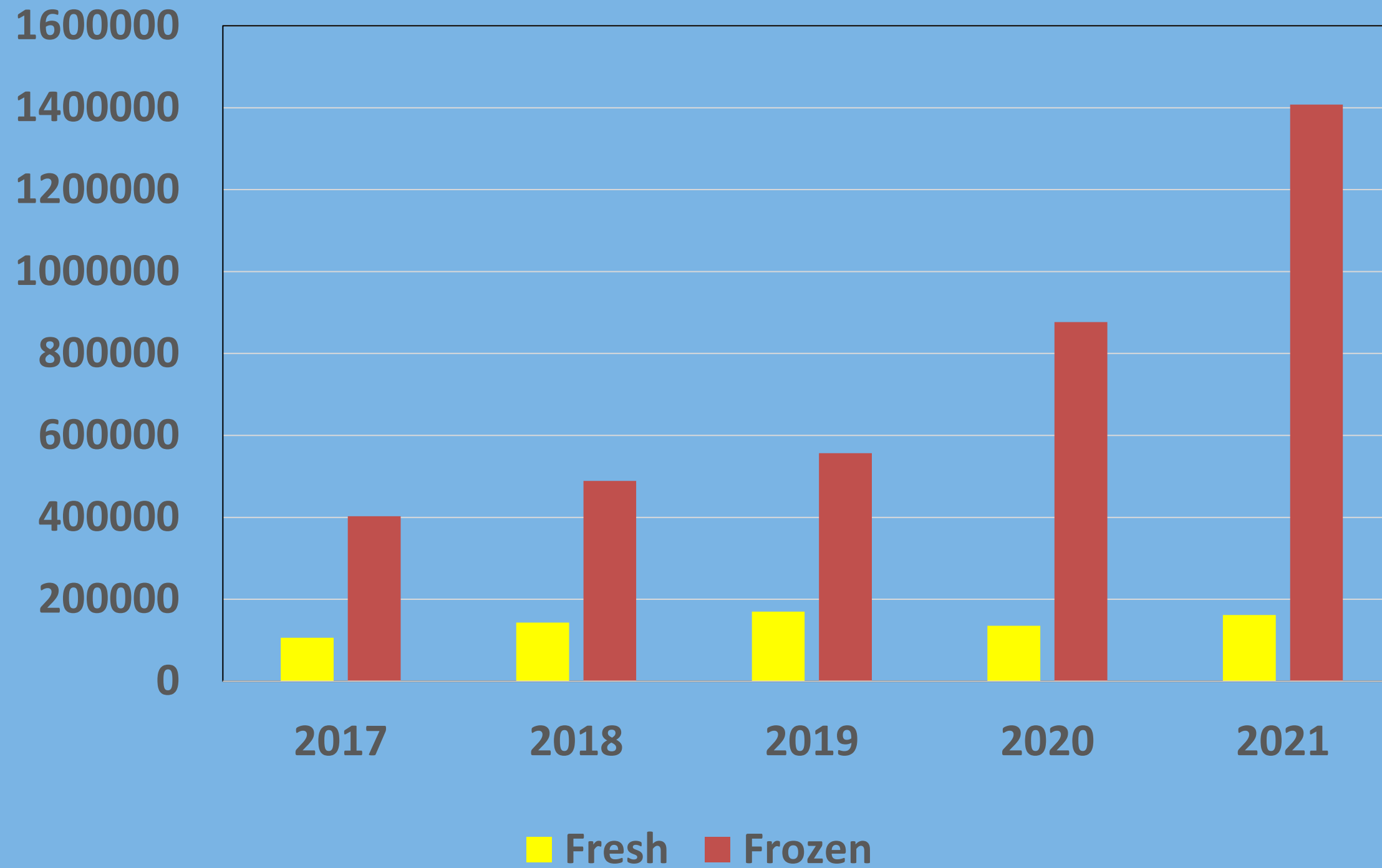
- In Asian catering trade, Sushi restaurants and takeaway (in supermarkets) is a driving force in salmon sales
- Popularity of salmon in Asia goes beyond the traditional fillets and steaks which that makes it popular to supermarkets/retailers

The factor that matters is:

- Almost all parts of these imported salmon (heads, trims, skins, tails) are sold as food fish in the retail trade at prices attractive to customers, compared with high priced fillets or steaks.



Asia: Imports of Fresh and Frozen Salmon (MT)



**URBAN AQUAPONICS: AN INNOVATIVE
WAY TO PRODUCE FISH AND PLANTS
AMIDST THE COVID-19 PANDEMIC**

**Empowering
Communities to
produce own food**



- Production of coastal and marine aquaculture commodities will continue to exhibit steady growth in Asia
 - Southeast Asia's wild capture fisheries are under stress and this has sparked a surge in interest in offshore aquaculture in the region.
- There is a need to produce high value marine species in the region using the best available technologies
- Food service is being digitized and nearly 50% of the world population is using social media now
- Innovation and technology are crafting and moulding the path to recovery, the adaptation. This is going to characterize the growth in the industry from now on and should be tapped
- Focus should be on how to cater to the consumers better, longer shelf life and variety, convenience



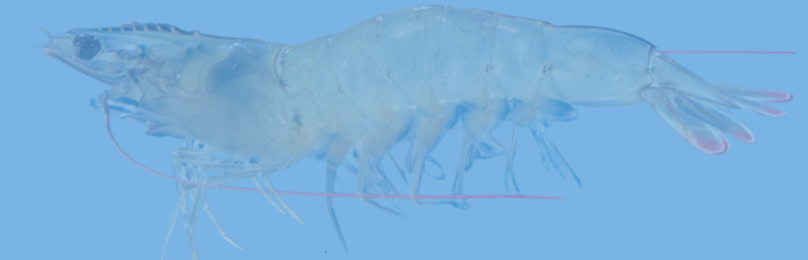
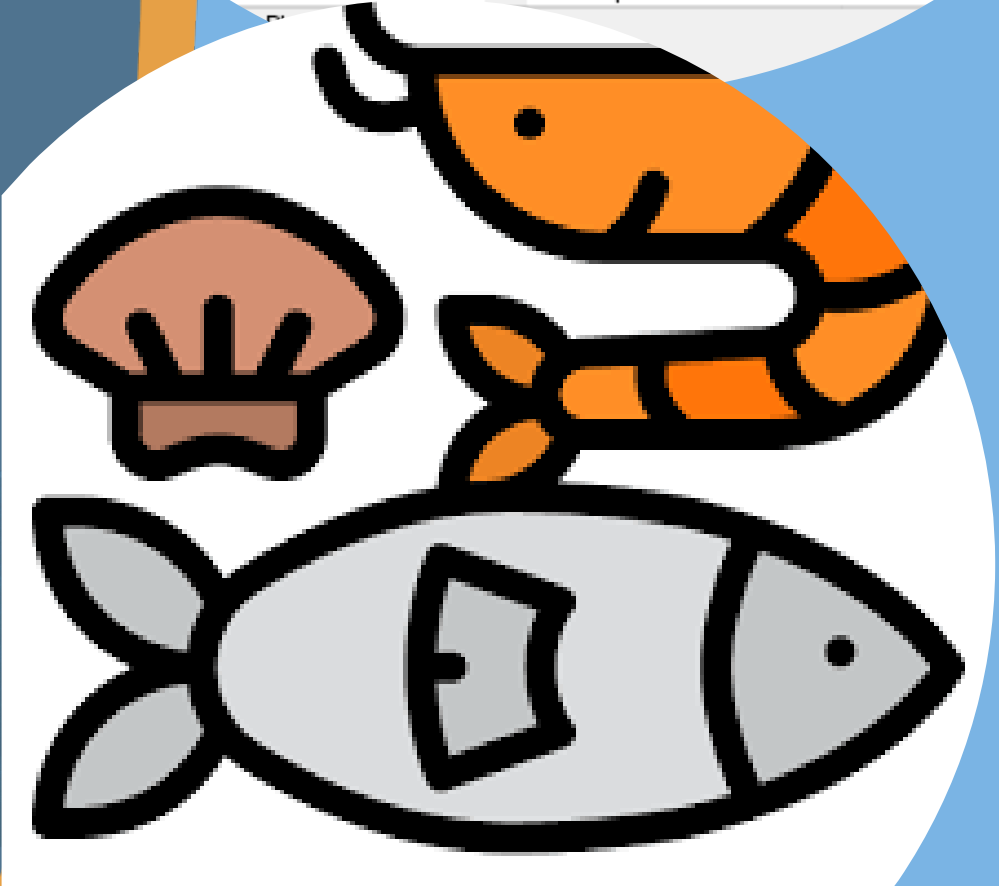
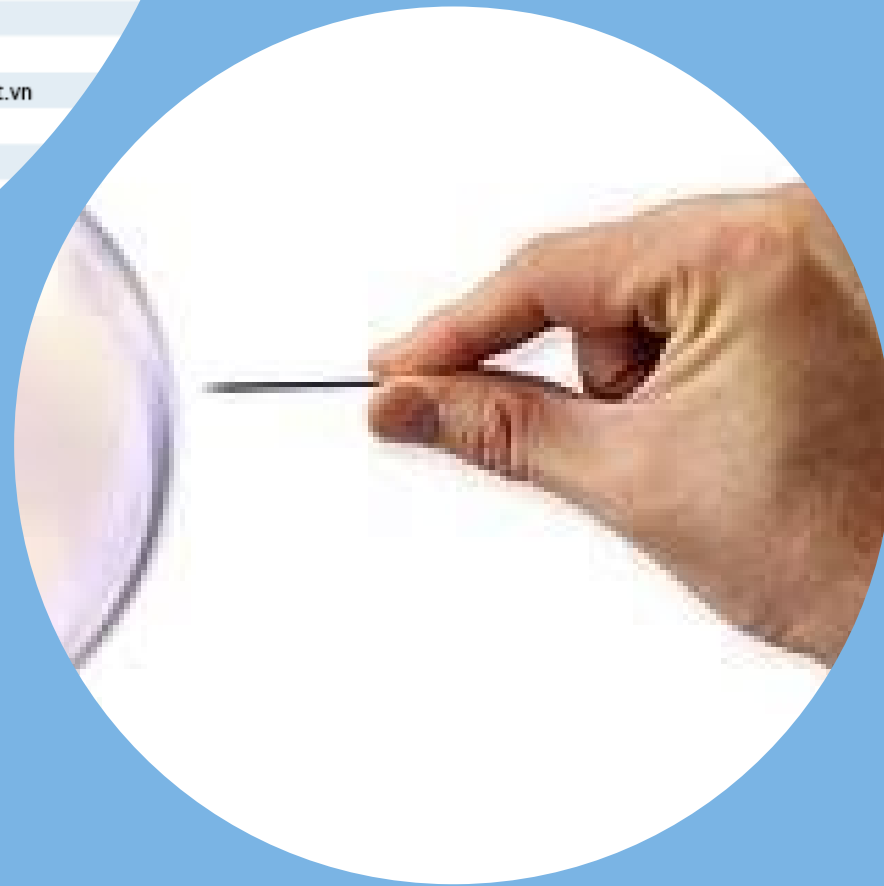
Will the bubble burst?

Top shopping apps by downloads in Southeast Asia (March 1 to March 28)

| Indonesia | | | Malaysia | | | Philippines | | |
|-----------|------------------------------|-------------|-------------|-------------|---------------------|-------------|---------------------|-------------|
| Rank | App name | Rank change | App name | Rank change | App name | Rank | App name | Rank change |
| 1 | Shopee | - | Shopee | - | Shopee | 1 | Shopee | - |
| 2 | Lazada | - | Lazada | 1 | Lazada | 2 | Lazada | - |
| 3 | Tokopedia | 2 | Fingo | -1 | Alibaba.com | 3 | Alibaba.com | - |
| 4 | Akulaku | -1 | Wish | 3 | Wish | 4 | Wish | - |
| 5 | Bukalapak - Jual Beli Online | -1 | Mudah.my | - | ShopBack | 5 | ShopBack | - |
| 6 | vivo.com | -6 | MYWatsons | - | Watsons Philippines | 6 | Watsons Philippines | - |
| 7 | Blibli.com | -1 | ShopBack | -3 | ZALORA | 7 | ZALORA | - |
| 8 | OLX Indonesia | -1 | AliExpress | 19 | Zaful | 8 | Zaful | - |
| 9 | JD.id | -1 | Go Shop | -1 | Puregold Mobile | 9 | Puregold Mobile | - |
| 10 | AliExpress | 17 | Alibaba.com | 6 | GoSwak | 10 | GoSwak | - |

| Singapore | | | Thailand | | | Vietnam | | |
|-----------|-----------|-------------|---------------------------------|-------------|------------|---------|------------|-------------|
| Rank | App name | Rank change | App name | Rank change | App name | Rank | App name | Rank change |
| 1 | Shopee | - | Lazada | 1 | Shopee | 1 | Shopee | - |
| 2 | Lazada | - | Shopee | -1 | Lazada | 2 | Lazada | - |
| 3 | ShopBack | 8 | 7-Delivery: สั่งสินค้า 7-Eleven | 6 | Sendo | 3 | Sendo | - |
| 4 | Carousell | - | Wish | 1 | Tiki.vn | 4 | Tiki.vn | - |
| 5 | Wish | - | Big C TH | 5 | Cho Tot.vn | 5 | Cho Tot.vn | - |
| 6 | Amazon | -3 | JD CENTRAL | 1 | GET IT | 6 | GET IT | - |
| 7 | FairPrice | 2 | Watsons TH | 4 | Loship | 7 | Loship | - |
| 8 | FIN | 2 | Youpik | 8 | ShopP | 8 | ShopP | - |
| 9 | Singapore | -2 | Tops Supermarket | 9 | Go | 9 | Go | - |
| 10 | Singapore | -2 | Thisshop | -6 | | 10 | | - |

- No specific data available on the volume or at least on the value of seafood sold online and consumed through food delivery just yet, but the demand for this is stronger
- Food service is being digitized and nearly 50% of the world population is using social media now
- Innovation and technology are crafting and moulding the path to recovery, the adaptation.
- This is going to characterize the growth in the industry from now on and should be tapped
- Focus should be on how to cater to the consumers better, longer shelf life and variety, convenience



“Covid-19 is a catalyst of digital transformation in Southeast Asia,” Lazada Group CEO Pierre Poignant said. “When consumers build a habit, it doesn’t easily go away.

E-commerce will become a way of life.”

