Date: 12/30/2017
GAIN Report Number: CH17057

China - Peoples Republic of

Post: Beijing

2017 China's Fishery Annual

Report Categories:
Fishery Products

Approved By:
Michael Ward

Prepared By:
FAS Beijing Staff

Report Highlights:
China continues to be the world's largest seafood producer with overall seafood production estimated at 69.96 million tons (MMT) in 2017, up 1.4 percent from the previous year. Growth in aquaculture remains the key factor driving domestic production. This trend is expected to continue and add further to total seafood production in 2018. Conversely, wild catch production remains stagnant. Driven by a large domestic processing capacity and aimed for value-added exports, China's imports of seafood are expected to rebound sharply in 2017. The rebound is in response to recovering global seafood demand, as well as, growing domestic consumption as a result of higher incomes. U.S. seafood exports to China are expected to increase in 2017. Best import prospects include frozen fish (salmon, flatfish, and cod), shrimp as well as high-value live seafood.

Executive Summary:

China continues to be the world's largest seafood producer with overall seafood production estimated at 69.96 MMT in 2017, up 1.4 percent from the previous year. Growth in aquaculture remains the key factor driving production. This trend is expected to continue and further add to total seafood production in 2018. China remains the world's largest aquaculture producer accounting for over 60 percent of world cultured seafood production. Although area expansion (both freshwater and ocean water resources) has stopped since 2016, China's cultured seafood production is expected to continue growing based on yield gains and is expected to raise overall production in 2017 and beyond. The rapid exploitation of water resources and coastal development in recent years and environmental concerns constrain further expansion opportunities.

Driven by a strong seafood processing capacity, mainly aimed at exporting value-added processed seafood products, and a robust domestic consumption, China's seafood imports are expected to rebound in 2017. Total seafood imports volume is expected to reach 2.8 MMT, up 6.5 percent over the previous and the second highest volume on record. That said, increasing processing costs and rising input costs continue to challenge growth in exports of processed seafood products. At the same time, China's growing affluence is increasing domestic demand for alternative sources of protein, including seafood products. Thus, driven by the Chinese middle-class' increased preference for wild caught products, Chinese seafood imports for domestic consumption are expected to grow steadily in 2017 and in the coming years.

China's total seafood exports, valued at $19.3 billion in 2016, are expected to grow moderately to $19.7 billion in 2017. This increase is supported by a recovery in exports of value-added processed seafood products (utilizing imported raw seafood) and stable exports of cultured seafood. China's seafood exports to the United States are expected to recover to $3.1 billion from the $2.94 billion in 2016.

After two stagnant years, U.S. seafood exports to China are expected to rise sharply in 2017 to a record $1.2 billion. Lower Chinese import duties for some seafood species is likely to encourage more imports for domestic consumption in 2018. Best import prospects include frozen fish (salmon, flatfish including halibut, plaice, sole, and cod), shrimp, as well as, high value live seafood.

Note: This report uses Chinese terminology to maintain consistency between Chinese statistics and product categories. Total seafood trade statistics in this report DO NOT include fishmeal.

Definition of terms used in this report:
-Seafood products: includes both wild caught and cultured products from marine and freshwater sources, including oceans, rivers, lakes and ponds.

-Seafood catch production: total volume of wild caught seafood products from freshwater and marine sources inclusive.

-Seafood cultured production: total volume of cultured seafood products from freshwater and marine sources inclusive.

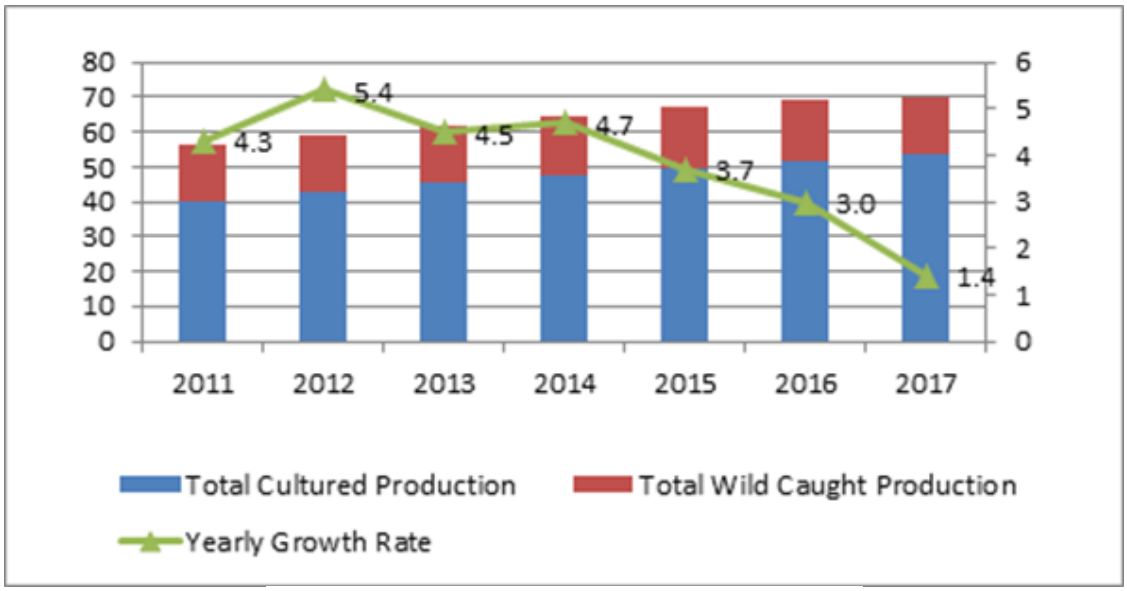
Total Seafood Production

In 2017, China's total seafood production is expected to continue growing, surpassing 2016's production by 1.4 percent, and reaching 69.69 MMT. This upward trend is driven by growth in cultured seafood production offsetting further declines in wild caught production. China's National Statistics Bureau (NSB) reported that total seafood production totaled 69.01 MMT in 2016, up 3 percent over the previous year. Cultured production stood at 51.42 MMT, up 4.1 percent from the previous year. Conversely, the 2016 wild caught production declined slightly to 17.59 MMT from the 17.62 MMT in 2015.

According to China's Ministry of Agriculture (MOA), the seafood industry showed steady growth during the first half of 2017 with total cultured seafood production up 4.98 percent from the previous year. However, wild caught production within Chinese waters remained stagnant with production up only slightly compared to the previous year. MOA officials expect total wild caught production within Chinese ocean waters to decline 8 percent in 2017. According to China's State Ocean Administration, during the first nine months of 2017, total wild caught production in Chinese ocean waters declined 11.9 percent. That said, wild caught production in other territorial ocean waters increased by 14.2 percent compared to the previous year.

The following chart shows total seafood production and yearly growth rate as of 2017. Despite an estimated 4.5 percent growth in cultured production, the growth rate for total seafood production is estimated at 1.4 percent, the lowest since 2011, due to lower wild caught production.

China's Seafood Production (in million tons) and Percentage Growth Rate 2011-2017



Source: NSB; 2017 data estimated by FAS/Beijing

Wild caught (non-cultured) seafood production

The 2017 total wild caught (non-cultured) production is estimated at 16.23 MMT, down 7.7 percent over the previous year. Preliminary data shows that in the first three quarters of 2017 wild caught production from Chinese ocean waters decreased by 11.9 percent compared to the previous year. An estimated increase in catch from other territorial seas slightly offset the rapid fall of domestic wild caught production in 2017.
Chinese official media outlets report that currently China maintains a 3,000 vessels fleet fishing in other territorial seas. Of these, more than 2,400 vessels were operational during the first half of 2017 with total catch production increasing to 0.82 MMT. Additionally, China's State Ocean Administration estimated that, in the first nine

months of 2017, total wild caught production in other territorial seas increased 14.2 percent compared to the previous year. MOA's plan is to maintain the 3,000 fishing vessel capacity to 2020. However, in the long term, growth in wild catch production from other territorial seas remain uncertain due to factors such as declining fish resources and policy changes in relevant countries.

Domestic ocean catch continues to be restricted by a "zero growth" threshold policy which was instituted back in 1999 which continues to limit China's annual catch. In 2017, MOA's stricter fishing supervision resulted in ceased operations for more than 4,000 fishing boats and the destruction of over 30,000 illegal fishing tools/nets. In addition, the annual two-to-three month summer fishing moratorium in China's seawater to facilitate the recovery of marine resources also continued in 2017. In December 2016, MOA proposed to start the fishing moratorium in the Yellow Sea and the Bohai Sea on May 1, 2017, one month earlier than originally planned. Other technical measures were also introduced to further aid the recovery of marine resources. For example, MOA plans to significantly reduce total wild caught production from Chinese territorial seas to about 10 MMT by 2020 from 13.28 MMT in 2016.

Regarding freshwater catch, MOA extended the three-month spring fishing ban in the Yangtze River to four months in 2017, this ban has been in place for the last fifteen years. MOA also maintained a two-month fishing ban in the Pearl River region for the sixth straight year. These seasonal fishing bans are expected to continue in 2018. In an effort to protect and restore ecological balance, the state and provincial fishery departments conduct frequent releases of aquatic fingerlings in national waters to increase wild stock.

Cultured seafood production

China remains the world's largest cultured seafood producer with total cultured seafood production accounting for more than 60 percent of global production. Driven by both ocean and freshwater seafood production, total cultured seafood production in 2017 is expected to hit 53.74 MMT, up 4.5 percent over the previous year. The estimated 53.74 MMT of cultured seafood production account for 76.8 percent of China's total seafood production in 2017. The estimated production growth is supported by MOA's preliminary statistics which estimated total cultured seafood production increased by 4.98 percent during the first half of 2017.

Between 2012 and 2016, China's marine cultured seafood production increased by 19.4 percent, while the freshwater cultured production grew 20.2 percent. In 2016, total cultured seafood production grew by 4.1 percent to a record 51.42 MMT. Anticipating a growing domestic demand for seafood products together with a forecast lower catch production, this trend is expected to continue in 2018.

Table 1. China's seafood production (Unit: 1000 tons)

Category/Year	2013	2014	2015	2016	2017
Total Seafood Production	61,720	64,615	66,996	69,012	69,965*
-Ocean Seafood Production	31,388	32,962	34,096	34,901	
--- Wild Catch	13,996	14,835	15,340	15,270	
--- Culture	17,392	18,126	18,756	19,631	
-Freshwater Seafood Production	30,332	31,653	32,900	34,111	
--- Wild Catch	2,307	2,295	2,278	2,318	
--- Culture	28,024	29,358	30,623	31,793	

Source: 2017 China Fishery Statistics Yearbook; * FAS/Beijing estimates

Major Cultured Seafood Products

Fish

Fish remained the largest category in all cultured seafood production at 29.51 MMT, accounting for 57.4 percent of all cultured production in 2016. Driven by growing domestic demand, the 2017 cultured fish production is expected to grow further.

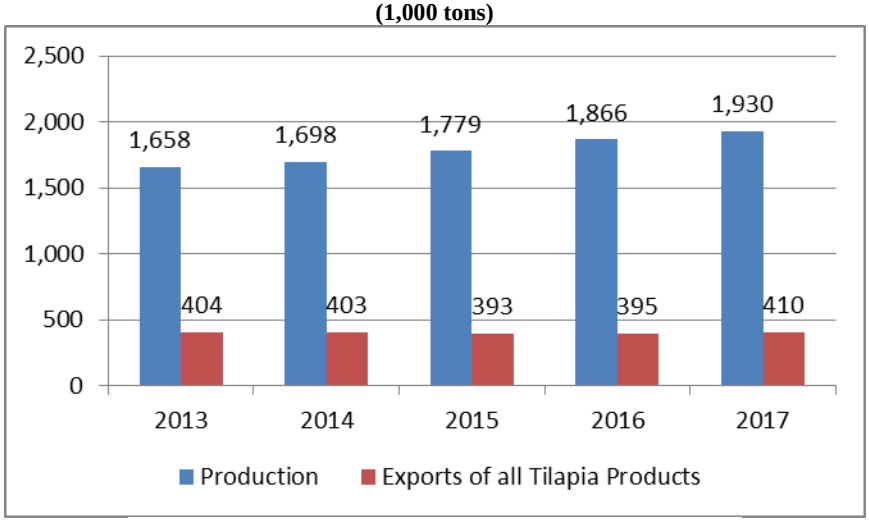
--Carp

Carp remains the most popular cultured freshwater fish with total production of 20.39 MMT in 2016, up from the 19.66 MMT in 2015. The net increase of 728,000 tons of carp, although lower than the net increase of 1.2 MMT in 2014, is consumed domestically to meet growing demand due to its affordable price and freshness. Carp is raised in almost all provinces/municipalities in ponds, lakes and reservoirs. Carp production is expected to grow further in 2017.

--Tilapia

China remains the world's largest tilapia producer with total production at 1.87 MMT in 2016, up from the 1.78 MMT in 2015. In recent years, tilapia farming has grown steadily and is expected to grow further to exceed 1.9 MMT in 2017. Although domestic consumption of tilapia is potentially large, the world demand for Chinese tilapia products continues to be the leading force driving this industry. Exports of tilapia products are expected to rise moderately as export growth to new markets including Africa will more than offset the fall in exports to the United States, China's largest export market. Processed tilapia products account for about 67 percent in export volume. Total tilapia exports (including raw fish equivalent for processed tilapia) could reach 875,000 tons, accounting for 45 percent of total tilapia production in 2017. China's tilapia industry continues to show comparative advantage in production efficiency supported by technical advancements such as new varieties with better growth performance. Notwithstanding, weather uncertainties, price fluctuation, and disease remain the main challenges for this sector.

Chinas' Tilapia Production and Exports of All Tilapia Products
(1,000 tons)



Source: China Fishery Yearbook and Global Trade Atlas;
*2017 data estimated by FAS/Beijing

China's top five tilapia producing provinces continue to be Guangdong, Hainan, Guangxi, Yunnan and Fujian. Combined production in these provinces amounted to 1.8 MMT in 2016, representing 96 percent of total tilapia production. Driven by strong local demand, Yunnan province continuously increased its tilapia production to 183,000 tons in 2016, up 6 percent over 2015.

--Catfish

In response to domestic demand, cultured catfish production grew steadily in 2016 with total production at 739,000 tons from the 715,000 tons in 2015. Catfish production is likely to increase in 2017 as domestic consumption remains robust. Cultured catfish for export remains soft due to strong domestic demand and competition from other suppliers. Combined cultured fish production in Sichuan, Jiangxi, Hubei, Guangdong, Hunan and Hubei provinces accounted for 68 percent of total production in 2016.

Shellfish

Cultured shellfish production, primarily marine based, reached 14.21 MMT in 2016, up from the 13.6 MMT in 2015. The production in 2017 is expected to grow moderately. In 2016, Shandong, Fujian, Guangdong, and Liaoning provinces continued to dominate China's cultured shellfish production accounting for 80 percent of total volume.

Crustaceans

China continued to be the largest cultured shrimp producer in the world with total cultured shrimp production at 3.3 MMT in 2016, up from the 3.03 MMT in 2015. Out of the total, cultured white shrimp (*penaeus vannamei*) production stood at 1.67 MMT, up from the 1.62 MMT in 2015. Industry sources believe that growth in domestic demand along with stable exports will continue to drive production high in 2017.

Cultured freshwater and seawater shrimp and prawn are produced primarily in Guangdong, Jiangsu, Hubei, Zhejiang and Guangxi provinces. In 2016, Guangdong led shrimp production with total cultured production of 760,000 tons, accounting for 22.9 percent of the national production. Of this amount, white shrimp production was 615,000 tons, up from the 598,000 tons in 2015. Crawfish (Procambarus clarkia) is mainly produced in Hubei with total production at 489,000 tons in 2016, accounting for 57 percent of the total production.

Table 2. China's ocean and freshwater seafood production by category (Unit: 1,000 tons)

Category/Year	2013	2014	2015	2016	2017*
Cultured products	45,416	47,484	49,379	51,424	53,740
--Fish	25,940	27,219	28,458	29,503	
--Shrimp, Prawn, and Crab	3,670	3,993	4,126	4,409	
--Shellfish	12,984	13,417	13,846	14,474	
--Algae	1,865	2,013	2,098	2,178	
--Other	857	841	852	860	
Catch products	16,303	17,131	17,617	17,588	16,225
--Fish	10,379	10,481	10,737	10,896	
--Shrimp, Prawn, and Crab	2,626	2,723	2,739	2,713	
--Shellfish	820	814	810	820	
--Mollusks	664	677	700	716	
--Algae	28	25	26	24	

--Other	434	383	414	431	

Source: 2017 China Fishery Statistics Yearbook; *FAS/Beijing estimates

Seafood Production by Province

In 2017, Shandong, Guangdong, Fujian and Zhejiang provinces were the largest seafood production areas due to favorable coastal locations and abundant freshwater resources/facilities. In terms of freshwater cultured production, Hubei, Guangdong, and Jiangsu provinces were the top-three producers. These rankings are expected to remain unchanged in general in 2017.

Table 3. China's Top 8 Seafood Producing Provinces in 2016 (Unit: 1,000 tons)

Province	Total production	Cultured production	Wild caught production
Total	69,012	51,242	17,588
Shandong	9,502	6,564	2,938
Guangdong	8,738	7,089	1,649
Fujian	7,678	5,260	2,418
Zhejiang	6,045	2,069	3,976
Liaoning	5,501	4,080	1,421
Jiangsu	5,207	4,321	886
Hubei	4,708	4,518	108
Guangxi	3,618	2,814	803
Other	18,015	14,527	3,389

Source: 2017 China Fishery Statistics Yearbook

Aquaculture area expansion stops for the first time in 2016

In 2016, China's continuous aquaculture area expansion came to a halt for the very first time. The halt is mainly due to the government's efforts to protect natural resources and environment. This trend is expected to continue in 2017 and beyond, and is expected to limit opportunities for China's aquaculture area to expand further. As a result, total aquaculture area declined by 1.4 percent in 2016. In particular, the marine aquaculture area fell by 6.5 percent. Excessive aquaculture operations increasingly damaged the ecological system and polluted water resources. Following serious pollution caused in some provinces during 2016, such as Zhejiang on the eastern coast of China, the government closed some aquaculture farms and compensated farmers for the closures. The government also designated some coastal line/offshore waters as special marine species protection areas or eco-repairing regions. In Hubei and Hunan provinces, the freshwater aquaculture area declined significantly as the government banned or limited aquaculture farming in many reservoirs and large lakes since 2016. In addition, farmers are facing higher rental rates to use water resources (including ponds and ocean waters) which are chipping away their profits and limiting their ability to expand aquaculture farming.

In October 2017, MOA published a plan (from 2017 to 2025) to build marine fish farms, to modernize China's marine fishery, and to protect marine resources and environment. In an effort to add aquaculture water area and add cultured seafood production, in recent years, the government and the industry promoted a new "rice farming and aquaculture" model. Based on official reports, in 2016, an estimated 1.5 MHa of paddy field was simultaneously grown along with crab, shrimp, fish, soft-shell turtle and eel.

Table 4. China's Aquaculture Area Resources (Unit: Hectares)

Year	Total	Marine	Freshwater	Freshwater-Pond	Freshwater-Reservoir	Freshwater-Lake	Freshwater-Other
2016	**8,346,339**	**2,166,720**	**6,179,619**				
2015	8,465,004	2,317,763	6,147,241				
2014	8,386,360	2,305,472	6,080,888				
2013	8,321,699	2,305,472	6,006,130				
2012	8,088,403	2,180,927	5,907,476				
2011	7,834,950	2,106,382	5,728,568	2,449,911	1,851,877	1,023,009	
16/15 Change	**-1.4%**	**-6.5%**	**0.5%**				
15/14 Change	0.9%	0.5%	1.1%				
14/13 Change	0.8%	-0.4%	1.2%				
13/12 Change	2.9%	6.2%	1.6%				
12/11 Change	3.2%	3.5%	3.1%				

Source: 2017 China Fishery Statistics Yearbook

Aquaculture Sector Faces Challenges

In general, China's aquaculture production continues to face increasing damage from natural disasters such as typhoons, floods, and low temperature in spring. Additionally, the spread of diseases, including streptococcus and other diseases, continues to impact tilapia production. Since 2015, shrimp farmers were reportedly frustrated by a wide spread syndrome in shrimp farming commonly referenced in Mandarin as "never grew up.[1]" Older aquaculture facilities (both freshwater and ocean water) suffered lower productivity due to natural disasters, water pollution, and higher disease rates which reduced fish growth and yield.

In response, China's industry continues to minimize the impact of these diseases by expanding technical advancements, and promoting better aquaculture practices. Chinese shrimp aquaculture experts are conducting research on genetics/breeding and promoting better farming practices on culture density, feeding and disease prevention, and drug use to resolve the "never grew up" problem. In August 2016, a "National Tilapia Industry Innovation Alliance" was formed with the goal to develop a new technology to upgrade tilapia production and processing in China. In addition, many farms reduced fish culture density to maintain water quality and lower infection risks. Producers further tightened quality controls on feed and fingerling inputs. The Chinese government and the industry have enhanced research on new species that are more tolerant to stress and disease, they have also developed specialized tilapia feed suitable for various growing stages and environments.

[1] The "never grew up" syndrome refers to a complex series of issues including deterioration of species and environmental stress that inhibit the ability for shrimp to reach full maturity.

MOA announced it will continue to support the "Healthy Aquaculture Demonstration Program" in 2017 with more than 500 aquaculture farms participating in the program. These farms are required to meet the MOA standards and are subject to audits to ensure the production and expansion is healthy and sustainable.
In addition, the U.S. industry has been working with China's aquaculture producers to improve aquatic feed, and intensive culture pond management in order to secure a favorable environment essential to increasing fish yield.

Tilapia marketing in both domestic and global markets is increasingly challenged by more competitively priced Basa fish from countries like Vietnam. Many Chinese restaurants use imported Basa fillet due to its favorable price. Imported shrimp/prawns are also taking a larger share of the domestic market.

Seafood Processing

MOA's data shows that in 2016, the total number of seafood processing facilities was 9,694, down from 9,892 in 2015. However, total processing capacity increased to 28.5 MMT from 28.1 MMT in 2015. This trend reflects a restructuring and consolidation of the sector. Chinese industry insiders believe that China remains the world's largest processing center for mackerel, salmon, cod, and herring.

Seafood processing bases are located in or near major seafood producing regions. Seafood processing is concentrated in coastal Shandong, Fujian, Liaoning and Zhejiang provinces with combined processed production of 15.09 MMT, accounting for 70 percent of the nation's total production. In 2016, Shandong Province continued to be the largest processor with processed seafood production of 6.98 MMT. Fujian Province trails second with total processed production at 3.11 MMT. These provinces are not only major seafood producers but are also equipped with port and cold storage facilities. It is important to note that many foreign enterprises have processing facilities in these provinces.

In 2016, total processed seafood product volume increased to 21.65 MMT. Out of this total volume, 14.05 MMT was frozen or only primary processed. Secondary processed marine seafood products account for 82 percent of total seafood production. The surviving small share of fresh water seafood within processed seafood reflects Chinese consumers continued preference for live products. Nonetheless, the processed seafood volume is expected to continue to grow in 2017 and beyond. Domestic demand for frozen processed seafood products continues to rise with more frozen and frozen processed goods being shipped to interior provinces.

Imported seafood products that are processed and re-exported are exempt from tariffs and value-added taxes (VAT). Imported seafood products which are processed and sold in China are subject to a tariff generally ranging from 10 to 17 percent (in recent years a lowered applied rate ranging from 2 to 5 percent has been enforced for some species see Policy Section below) and a VAT of 13 percent. China's financial incentives toward re-export are reportedly related to the role of the processing industry in the generation of new employment and the production of rendered feed ingredients to satisfy the feed industry's growing demand. However, this industry is increasingly challenged by increases in labor and environmental costs.

To ensure the quality of seafood products for export, MOA and AQSIQ enforce a strict licensing regime for all export-oriented farms and processing establishments. MOA and AQSIQ conduct frequent field audits; seafood products for export are subject to mandatory inspection and must be accompanied by AQSIQ inspection certificates.

Consumption

Driven by higher disposable incomes along with GDP growth exceeding 6.7 percent, Chinese seafood consumption is expected to continue growing in 2017. Increasing food safety incidents related to livestock and poultry products have encouraged Chinese consumer's spending on seafood products. However, as shown in the table below, per capita consumption of other protein remains comparatively high. According to NSB, the 2016 per capita consumption of seafood products grew to 14.8 Kg in urban areas and to 7.5 Kg in the rural sector, consumption in both areas up from the previous year. The per capita consumption of seafood products is the highest in China's coastal regions (where seafood products have been a traditional source of protein) and locations with relatively high disposable income.

Table 5. Per Capita Consumption Trends of Seafood and Animal Products (Kg)

Year	**2013**	**2014**	**2015**	**2016**
Per Capita Consumption Trends for Seafood Products				
Urban	14	14.4	14.7	14.8
Rural	6.6	6.8	7.2	7.5
Per Capita Consumption Trends for Pork, Beef, Poultry, Mutton and products				
Urban	36.6	37.5	38.3	39.2
Rural	28.6	29.2	30.2	30.6

Source: 2017 China Statistical Yearbook

Most Chinese consumers prefer live/fresh seafood goods to processed products. Thus, domestic consumption of processed seafood products is small compared to the overall domestic seafood consumption. However, along with the improvement of China's processing and distribution/cold chain systems and affluent consumers' increased interest in a more diversified and nutritious diet, frozen and processed seafood consumption is expected to increase steadily in both the rural and urban areas. In addition, industry insiders believe that shipping and maintaining live aquatic products increases the potential for food safety incidents.

Prices

According to MOA, sales of seafood products remained strong in 2016 characterized by adequate supply at stable prices. This trend continued during the first half of 2017. Compared to the previous year, the composite average wholesale price[2] for seafood increased 1.45 percent; that for fresh water seafood increased 3.41 percent. The higher price for fresh water seafood is partly due to an increase in production costs, and tighter supplies following a flood in 2016. In general, seafood prices are expected to grow moderately in 2017 as consumption continues to be driven by improvements in consumers' living standards.

Trade

Seafood trade is expected to recover in 2017 boosted by increased demand in both domestic and international markets. According to Global Trade Atlas (GTA) statistics, seafood imports in the first ten months of 2017 increased by 10.8 percent to 2.17 MMT tons, valued at $6.6 billion and up 16.9 percent from the previous year. Industry sources attribute China's growing imports of seafood to the recovery in global demand (driving China's seafood imports for re-processing), and a robust domestic seafood consumption. China's seafood exports, primarily value-added products, are also expected to rise in 2017. During the first ten months of 2017, Chinese seafood exports grew 3.9 percent in volume to 3.29 MMT and increased in value by 2 percent to $15.77 billion.

[2] The "composite" average price refers to a methodology MOA uses to estimate and compare the wholesale price for the large varieties of seafood products.

China maintains a comparative advantage in seafood processing with imported materials and domestic cultured resources. China's seafood trade in the near future is likely to continue growing moderately given China's developed and advanced large scale seafood processing capacity and growing domestic seafood consumption.

Imports

The GTA data shows seafood imports in the first ten months of 2017 increased by 10.8 percent to 2.17 MMT tons and valued at $6.6 billion, up 16.9 percent from the previous year. This growing trend is expected to drive seafood imports in 2017 to exceed the historical peak in 2014 when imports reached 2.87 MMT. Seafood imports as raw materials for re-export remain the leading driver behind China's global sourcing. In 2016, China's seafood imports as raw materials fell as global demand for processed seafood lowered. Higher domestic production costs also affected processing for re-export and thus discouraged the need for raw seafood imports.

During 2016, Russia remained China's largest seafood product supplier with total export value of $1.22 billion followed by the United States and Canada. China's seafood imports from the United States valued at $1.03 billion in 2016 were down from $1.18 billion in 2014. However, in the first ten months of 2017, as China's exports of processed seafood recovered, seafood imports from the United States surged 24.4 percent and hit $1.07 billion. Qingdao and Dalian continued to be the two largest receiving ports for seafood products.

As of this report, data for seafood imports broken down specifically by use (for domestic consumption or re-export) for 2016 and 2017 were not available. However, most industry sources expect that the trend will be for seafood imports to continue rising. Chinese imports of seafood for domestic consumption grew slightly in 2015. MOA data indicates that imports of seafood (including live seafood) for domestic consumption recovered slightly in 2015 with volume up by 0.56 percent at 830,000 tons and valued at $3.11 billion.

In the long term, imports of seafood for domestic consumption are expected to grow. For instance, China's total imports of salmon continued to be strong with total imports surpassing 169,000 tons in the first ten months of 2017. In particular, imports from the United States recovered to 88,700 tons. In 2016, China's imports of U.S. salmon decreased significantly to 56,000 tons from the record level of 96,801 tons in 2015. Prospects for Chinese imports of salmon for domestic consumption continue to be promising as consumers opt for high-value marine seafood. Chinese imports of flat fish also rebounded in the first ten months of 2017, up 10.3 percent from the previous year. In addition to salmon, Chinese consumer preferences for imported seafood species include cod, halibut, shrimp/prawns and many live species, such as geoducks, lobster and crab.

Exports

In 2017, seafood exports are expected to continue improving driven by a demand recovery in major seafood markets. During the first ten months of 2017, the GTA data showed seafood exports grew 3.9 percent and reached 3.29 MMT, valued at $15.77 billion, up 2 percent in value compared to the previous year.

China's seafood exports recovered moderately in 2016, up 2.6 percent in value from the previous year. Major seafood export destinations (with export value over $100 million) diversified to twenty five destinations in 2016. Japan continues to be the largest export destination followed by the United States. China's seafood exports to the United States declined to $2.94 billion in 2016 from the $3.08 billion in 2015. Seafood exports to the United States reached $2.47 billion in the first ten months of 2017, up 6.5 percent from the previous year.

China's industry leaders remain confident that in the foreseeable future, the total value of seafood exports will maintain moderate growth given China's strong processing capacity of seafood and robust aquaculture sector supporting the export of cultured seafood.

--Exports of all major seafood categories recovered in 2016

China's seafood exports are characterized by value-added products based on the demand preferences of importing countries. In 2016, exports of all major seafood products recovered in value, except prepared and packaged fish products (HS Code 1604) and Crustaceans (HS Code 0306) which decreased moderately. Specifically, exports of fish/frozen (HS Code 0303) and fish/fillet (HS Code 0304), prepared and packaged crustaceans and mollusks (HS Code 1605) and Mollusks and others (0307) increased in volume and value.

Fish/fillet (HS Code 0304) remained the largest export category with an export value of $4.24 billion, followed by mollusks and other (HS Code 0307) and prepared and packaged crustaceans and mollusks (HS Code 1605). During the first ten months of 2017, the export trend for major seafood categories continued with fish/fillet (HS Code 0304) remaining the largest export category valued at $3.54 billion, up 3.5 percent over the previous year.

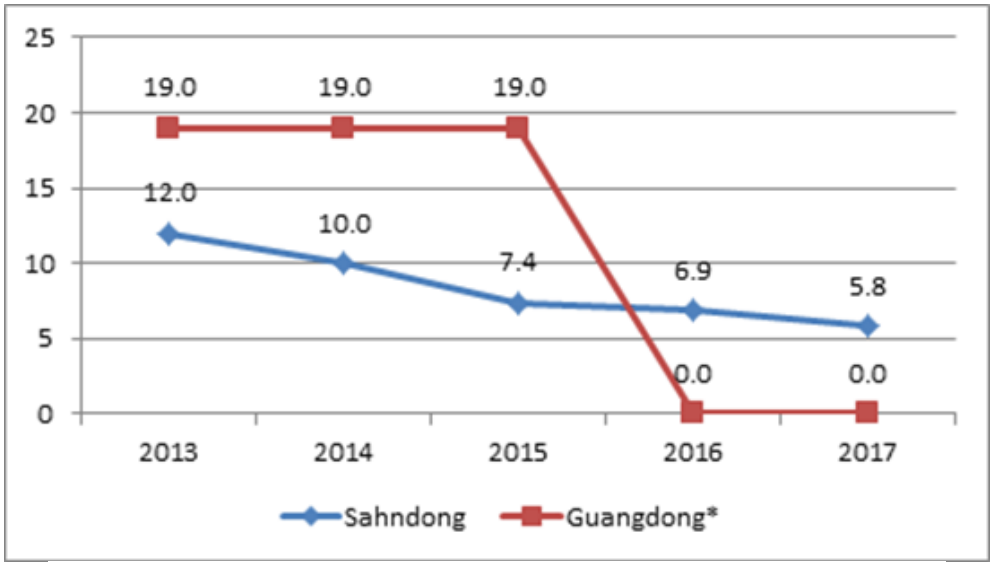
Despite a decline in exports to the traditional markets such as the United States, China's exports of all tilapia products are expected to rise in 2017 as demand in Russia and Africa grows. In 2016, the export volume of all tilapia products remained almost unchanged from 2015. However, export value declined 5.6 percent due to a lower unit price. Exports in the first ten months of 2017 showed a recovery in volume of 4.8 percent and a recovery in value of 2.2 percent compared to the previous year. In 2016, the United States remained the largest export destination for Chinese tilapia products with a volume of 141,000 tons, and accounted for 35.8 percent of China's total tilapia exports. Out of China's total tilapia exports to the United States, tilapia fillet was the largest category in 2016 with a volume of 62,500 tons or 44.3 percent. Compared to the previous year, China's tilapia exports to the United States fell by 5.2 percent in volume during the first ten months of 2017 mainly due to increasing competition in the U.S. market.

--Exports of processed products (using imported materials) are expected to recover

Industry sources expected exports of processed seafood products (using imported materials) to recover moderately in 2017. However, specific statistics in this regard for 2016 and 2017 are not available. According to MOA, exports of processed seafood using imported materials in 2015 were down 5.35 percent to 1.12 million tons and down 4.22 percent in value at $5.23 billion compared to the previous year. The share of export value (using imported materials) in China's total seafood exports continued to shrink to about 24 percent, significantly lower than the 40 percent in 2007.

Weak demand in some major overseas markets, and the re-location of seafood processing facilities to other countries--where input costs are lower--tempered further expansion of China's seafood processing sector in 2015-2016. In recent years, China's labor costs continued to rise, particularly in coastal provinces. For instance, in Shandong Province, the largest seafood processing base, the minimum wage was raised further by 5.8 percent in 2017 following a 6.9 percent increase in 2016. In Liaoning Province, the minimum wage surged 17.7 percent since April 1, 2016. In Guangdong, the leading cultured seafood exporting province, the provincial government put on hold on minimum wage adjustment in 2016 after three years of consecutive increases. Meanwhile, exports from cultured seafood continue to gain share in value.

Minimum Wage Yearly Growth Rate in 2 Provinces (2013-1017)



Source: Shandong and Guangdong Provincial Humans Resources and Social Security Bureau

Policy

--Registration requirements for overseas processed seafood suppliers (Decree 145)

On March 22, 2012, AQSIQ released the Administrative Measures for Registration of Overseas Manufacturers of Imported Food (AQSIQ Decree 145), which was implemented on May 1, 2012. The Measures require that foreign food production facilities that export products to China must be registered with China's Certification and Accreditation Administration (CNCA).

On December 21, 2015, AQSIQ released the latest Implementation Catalogue for Registration of Overseas Manufacturers of Imported Food, which requires the registration of meat, seafood, dairy and cubilose (bird nest) production facilities. The registration lists can be found here: http://www.cnca.gov.cn/ywzl/gjgnhz/jkzl/, which are updated by CNCA on a regular basis.

Currently, the United States government maintains regular communication with AQSIQ to facilitate the registration process. The list of registered U.S. seafood suppliers is regularly updated by AQSIQ to ensure exports to China continue smoothly.

--Registration requirements for live seafood exports to China

In late July 2016, AQSIQ published Decree No. 183 on Administrative Measures for Supervision of Inspection and Quarantine of Entry Live Aquatic Animals (replacing the Decree No. 44 enforced in 2003) which took effect on September 1, 2016. Decree No. 183 requires overseas suppliers of live aquatic animals to be registered with AQSIQ. AQSIQ's Department for Supervision of Inspection and Quarantine of Animal and Plant is the Department responsible for implementation.

The administrative measures under Decree 183 establish a quarantine access system to conduct risk analysis, as well as a safety and health control system to evaluate aquatic animals imported for the first time, and also to review traditionally traded imports. The access list will be released by AQSIQ. Foreign aquaculture farms and packaging enterprises exporting live aquatic animals to China will be required to be registered with AQSIQ. Chinese importers will also be requested to be registered and to establish business

records.

According to AQSIQ, the existing exports of U.S. aquatic animals will continue. Currently, registration of U.S. enterprises of non-edible live aquatic animals is already under way. Registration for edible live aquatic animals is still pending. U.S. government agencies (Animal and Plant Health Inspection Service and The National Oceanic and Atmospheric Administration) continue to engage with AQSIQ as it implements the registration requirements under Decree 183.

--Sustainable development dialogue

China continues dialogue on global sustainable development for the seafood industry with a special focus on combating Illegal, Unregulated and Unreported (IUU) fishing, and the certification of products for international trade. In November 2017, the United States National Oceanic and Atmospheric Administration (NOAA), in collaboration with United States Department of Agriculture (USDA) conducted seminar in China to brief Chinese officials and industry leaders on the implementation of IUU certification system to minimize its impact on seafood trade (see marketing section for more information) on the event.

--Chinese exports of Siluriformes products to the United States

Effective on August 2, 2017, the Food Safety and Inspection Service (FSIS) of USDA requires all shipments of imported Siluriformes fish and fish products entering the United States to be presented at an Official Import Inspection Establishment for re-inspection by FSIS personnel. According to the FSIS website, currently, there are 17 Chinese eligible plants certificated to export these products to the United States. U.S. importers may consult with FSIS for specifics on sourcing these products from China.

--China's policy favors smooth growth for seafood production and exports

China's seafood development policy remains generally unchanged. Based on the 13th Five Year (2016-2020) Fishery Development Plan developed by MOA, main goals include to increase the "healthy aquaculture demonstration area" to 65 percent and to maintain the total domestic wild catch production at 10 MMT by 2020 from the current 13.28 MMT (2016). MOA plans to continue promoting major initiatives such as a more sustainable development model with resource utilization, environmental protection, food safety, and improvements to farmer income. Instead of expanding water resources for aquaculture, MOA requested to raise productivity/efficiency and upgrade quality. During 2017, MOA continued to build "healthy aquaculture demonstration farms" to standardize aquaculture practices nationwide. Another 500 demonstration farms will be built in 2017.

--Seafood imports for domestic consumption

Imported seafood products which are processed and sold in China are subject to a tariff generally ranging from 10 to 17 percent and 13 percent VAT. Some industry experts are calling for reductions in import duties and VAT for seafood species that are not produced in China to encourage more imports for domestic consumption. This will further facilitate their import and sale in the Chinese market.

As previously reported, import duties on some categories of seafood were reduced gradually since 2015 (see table below showing effective duties for some species as of the end of 2017). These lower duties are expected to remain effective in 2018.

HS Code	Description	Duty %	Effective duty %

03033110	Greenland halibut	10	**5**
03033200	Plaice (pleuronectes platessa)	12	**2**
03035100	Herrings (clupea harengus, clupea pallassi)	10	**2**
03036300	Cod (gadus morhua,gadus ogac,gdus macrocephalus)	10	**2**
03038910	Scabber fish	10	**5**
03062190	Reef shrimp and shrimp, not frozen	15	**10**
03062290	Ao lobster,not frozen	15	**10**
03034100	Albacore or longfinned tunas	12	**6**
03034200	Yellowfin tunas	12	**6**
03034400	Bigeye tunas	12	**6**
03034510	Atalantic Bluefin tunas	12	**6**
03034520	Pacific Bluefin tunas	12	**6**
03034600	Southern Bluefin tunas	12	**6**
03061490-11	Frozen lithodes aequispinus	10	**5**
03061612-10	Cold-water shrimp and prawns	5	**2**
03063399-11	Live lithodes aequispinus	14	**7**
03079190-30	Live,fresh,cold geoducks	14	**10**

Source: 2017 Customs Import and Export Tariff of P.R. China

Additionally, China announced its annual tariff revisions for 2018 a month early with tariff reductions on select commodities set to become effective on December 1, 2017, instead of the usual January 1, 2018 timeline. In addition to the earlier timing, this year's revisions were notable in that they primarily focused on middle-class consumer products including several seafood products. It is worth noting, that these reductions are temporary and China can unilaterally adjust the tariffs back up to the MFN bound rate. Chinese economists have publically called the move an affirmation of the government's determination to open up and transition the economy from an export-oriented economy to one driven by domestic consumption of consumer goods.

Broadening the temporary reductions made in 2017 on frozen and fresh king crab, China also reduced the import tariffs for all "other frozen crab" (HS 03061490) to 5 percent, and for "other live crab" (HS 03063399) to 7 percent. Furthermore, certain shrimp tariffs were reduced (HS 03063190) for a second year, from 10 percent (2017) to 5 percent (2018). Tariffs on frozen salmon, frozen capelin, and live abalone were also reduced.

Tentative Import Tariffs for Certain Consumer Products (limited to seafood products)

HS Code	Commodity	2017 MFN rate (%)	Effective duty rate as of Dec. 1, 2017 (%)
03031300	Frozen Atlantic salmon and Danube salmon	10	5

03035900*	Frozen capelin, excluding edible remnants	10	5
03061490	Other frozen crab	10	5
03061612	Frozen pandaius borealis	5	2
03061719	Other frozen shrimp	5	2
03063190	Other live, fresh, or cold reef shrimp and shrimp	15	5
03063399	Other live, fresh, or cold crab	14	7
03078190	Other live, fresh, or cold abalone	14	7

Note: * indicates that goods applicable to provisional tax rate should be within the scope of the harmonized schedule tariff code and should be determined by the specific product description.

Marketing (ATO/Beijing)

China has transformed from being primarily a seafood processing hub to a seafood consuming country with its own strong domestic demand. China's seafood consumption trends changed in conjunction with other food retail sectors. Less wet-market seafood is available within walking distance of communities, and more consumers are now purchasing fresh and frozen seafood from supermarkets. Chinese consumers are not only becoming more accustomed to purchasing frozen (whole) seafood, but they are also purchasing greater quantities of portioned, headed, and/or gutted seafood in individual packages. Urban consumers are also increasing purchasing seafood (and other groceries) on their smart phones, and opting for same-day or next-day delivery. The seafood cold chain has developed enough to ensure frozen or even fresh seafood are delivered in prime best condition. For example, premium paying consumers living within Beijing's 5th ring road can receive a fresh seafood delivery within 60 minutes of ordering from a courier.

Chinese consumers have become more knowledgeable and aware of the food they eat, and they care about food's effect on human health. Some middle to high income consumers do not trust domestically produced or harvested seafood. They are concerned with issues such as water pollution and harmful use of antibiotics. Many consumers consider seafood from international deep oceans to be safer. The 2016 "second child policy" helped spur many parents to pay more attention to what their children are eating. For example, many consumers believe that deep ocean seafood delivers strong nutrition benefits for children (e.g., high in Omega 3). This provides an opportunity for imported seafood. However, international competition is strong. The United States, Canada, Russia, Norway, Chile, Australia, New Zealand, and Ireland, are all competing for market share in China.

Chinese importers are not only satisfied with intermediary seafood trading companies, but are also increasingly seeking to secure direct deals with harvesters. This increases the authenticity of the 'wild' caught seafood, and eliminates the middlemen. Some key e-commerce platforms are partnering with relatively small exporters and importers. Wholesale markets do still play an important role for second and third tier cities. Even though Tianjin as a port city, it does not have well-functioning wholesale seafood market. Jingshen is Beijing's largest wholesale seafood market. It continues to serve as the distribution hub for North China including Tianjin, Hebei, Shandong, and Henan.

Despite the growth in direct-to-consumer retail, the hotel restaurant and institutional (HRI) sector remains the largest purchaser of imported seafood products (by volume and value). Consumers may

learn about products from e-commerce and retail, and will look for those products while dining out. Dining out is still popular as consumers have less time to prepare complex food at home. Imported seafood dishes are also popular to order when dining out. The government's anti-corruption campaign caused some high-end famous restaurants to go out of business, while others transformed into focusing on family and middle-class diners. Star-rated hotels used to focus on business banquets, but now even five-star hotels are holding wedding banquets and creating affordable menus for families. Major Chinese holidays are great occasions to promote sales and to introduce new products. Mid-Autumn Festival in September and Chinese New Year in February are the most celebrated traditional holidays in China.

Agricultural Trade Offices (ATO) directly support product promotions with Cooperators, other industry groups, U.S. exporters and Chinese importers. ATOs also work with exporters and distributors to introduce new products. Each year ATO Beijing participates and supports U.S. exporters at the China Fishery & Seafood Expo (CFSE) in Qingdao. CFSE has grown to be the 2nd largest seafood show in the world, and the largest seafood show in Asia. We encourage U.S. exporters to attend CFSE in order to meet Chinese buyers. During the 2017 show, ATO Beijing held the first U.S.-China Aquatic Products Seminar to educate influential Chinese seafood importers and distributors about U.S. seafood sustainability, quality, and safety. Many Chinese importers are interested in importing U.S. seafood, but they are unsure how U.S. seafood is regulated and certified. To help increase their knowledge, ATO Beijing and OAA Beijing worked with the U.S. National Oceanic and Atmospheric Administration (NOAA) and the China Aquatic Products Processing and Marketing Association (CAPPMA) to hold this seminar. The seminar also allowed NOAA representatives to provide CAPPMA an overview of new U.S. IUU requirements ATO Beijing will continue to work with CAPPMA and NOAA on future industry outreach regarding U.S. fishery sustainability, certification, and regulation.

Trade Tables

Trade of Certain Seafood Products (Volume: Tons; Value: $ million)

Imports by Category

HS Code		Jan-Dec 2014		Jan-Dec 2015		Jan-Dec 2016		**Jan-Oct 2017**	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
	Total	2,870,801	6,753	2,706,836	6,487	2,628,306	6,972	2,410,194	6,600
0302	Fish, Fresh	38,792	280	56,570	336				
0303	Fish, Frozen	2,106,741	3,607	1,888,003	3,080	1,935,577	3,239	1,763,149	3,024
0304	Fish, Fillet	54,181	135	51,144	133				
0305	Fish, Dried, Salted, Brined	3,165	14	3,378	19				
0306	Crustaceans	152,921	1,666	174,577	1,853	194,627	2,102	177,899	1,972
0307	Mollusks & Other	423,387	806	413,748	836	334,924	911	291,065	862
1604	Prepared and Packaged Fish and Caviar	12,829	55	14,207	63				
1605	Prepared and Packaged Crustaceans and Mollusks	78,786	189	87,209	166				

Source: Global Trade Atlas

Exports by Category

HS Code		Jan-Dec 2014		Jan-Dec 2015		Jan-Dec 2016		**Jan–Oct 2017**	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
	Total	3,923,214	19,987	3,803,639	18,827	3,989,778	19,311	3,293,301	15,766
0302	Fish, Fresh	27,880	137	28,177	161				

0303	Fish, Frozen	1,017,489	2,612	977,560	2,534	1,079,318	2,755	941,579	2,175
0304	Fish, Fillet	1,055,447	4,681	962,493	4,284	984,100	4,239	800,276	3,544
0305	Fish, Dried, Salted, Brined	77,206	496	74,881	471				
0306	Crustaceans	194,426	2,047	176,779	1,714	171,213	1,683	134,280	1,132
0307	Mollusks and Other	612,043	3,222	615,712	3,415	639,097	3,672	467,616	2,743
1604	Prepared or Packaged Fish and Caviar	612,043	3,011	643,814	2,985	662,032	2,900	552,997	2,457
1605	Prepared or Packaged Crustaceans and Molluscs	365,738	3,781	324,222	3,264	347,740	3,395	318,505	3,231

Source: Global Trade Atlas

Seafood Products Trade by Country of Origin (Value: $ million)

Imports by Country of Origin

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Russia	1,271	1,173	1,361	1,218

United States	1,177	1,086	1,029	1,075
Canada	460	546	607	615
New Zealand	360	355	426	327
Norway	530	339	356	337
Indonesia	200	258	297	244
Japan	242	254	293	234
Chile	180	164	272	
Argentina	91	93	212	
Thailand	199	192	195	
Korea North	143	108	192	
Korea South	123	130	163	
Vietnam	90	83	128	
Taiwan	162	200	125	
Faroe Islands	105	127	103	
Greenland	64	90	101	
Other	1,354	1,288	1,111	
Total	6,753	6,487	6,972	6,600

Source: Global Trade Atlas

Exports by Country of Destination (Value: $ million)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Japan	3,448	3,344	3,339	2,869
United States	3,275	3,084	2,940	2,470
Hong Kong	2,038	1,739	1,718	1,261

Taiwan	1,419	1,412	1,551	1,319
Korea South	1,445	1,387	1,468	906
Thailand	833	1,155	1,070	1,036
Philippines	412	503	556	534
Malaysia	776	477	543	424
Germany	505	495	441	321
Mexico	378	349	428	379
Russia	647	361	420	354
Canada	396	347	416	338
Other	4,414	4,174	4,421	3,555
Total	19,987	18,827	19,311	15,766

Source: Global Trade Atlas

Imports of Fish, Frozen by Country of Origin (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Russia	819,853	811,088	893,450	854,315
United States	390,765	376,546	329,203	307,213
Norway	202,546	152,058	160,297	142,768

Taiwan	95,160	77,751	79,323	37,612
New Zealand	54,615	50,603	53,366	41,065
Canada	40,651	41,397	45,789	40,498
Indonesia	26,200	30,715	43,548	44,527
Japan	86,589	51,730	37,157	26,190
Iceland	18,297	21,252	32,315	26,204
Others	370,051	272,848	259,113	242,757
Total	2,106,741	1,888,003	1,935,577	1,763,149
$/T	1,712	1,631	1,674	1,715

Source: Global Trade Atlas

Imports of Flatfish by Country of Origin (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
United States	140,436	108,630	108,312	90,234
Russia	13,976	16,771	23,270	24,123
Canada	10,411	11,092	9,015	7,996
Norway	3,185	3,828	3,506	3,847
Greenland	7,512	5,673	3,259	2,654
Iceland	2,087	1,917	2,466	1,392
Japan	1,446	937	2,309	3,706
Others	12,487	10,198	9,076	9,972
World	191,540	159,046	161,213	143,924
$/Ton	1,790	1,915	2,022	2,196

Source: Global Trade Atlas

Imports of Salmon by Country of Origin (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Russia	28,979	25,771	93,204	34,278
United States	84,236	96,801	56,013	88,721
Chile	18,868	18,425	25,458	19,254
Faroe Islands	11,537	15,860	9,866	7,330

Canada	3,918	4,808	9,069	4,396
Japan	29,322	11,407	7,542	3,370
United Kingdom	7,955	8,554	4,689	5,538
Norway	10,712	3,952	731	917
Others	1,710	5,826	2,029	5,631
Total	197,237	191,404	208,601	169,435

Source: Global Trade Atlas

Imports of Herrings by Country of Origin (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Russia	132,416	97,499	92,164	125,993
United States	13,007	6,010	6,319	11,352
Germany	4,011	3,184	3,122	3,176
Canada	2,047	1,560	1,467	2,658
Netherlands	9,187	1,530	847	764
Others	7,806	491	530	1,230
World	168,474	110,274	104,449	145,173
$/Ton	533	577	622	631

Source: Global Trade Atlas

Imports of Crustaceans by Country of Origin (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Canada	39,202	44,075	42,465	45,047
Argentina	6,459	8,127	27,682	12,768
United States	13,892	12,869	15,646	12,460
Ecuador	16,777	27,019	13,547	13,360

Thailand	8,052	10,412	12,336	12,048
India	5,973	10,864	9,235	10,225
Bangladesh	6,731	7,088	8,755	5,654
Others	55,835	54,123	64,961	66,337
Total	152,921	174,577	194,627	177,899
$/Ton	10,895	10,614	10,801	11,084

Source: Global Trade Atlas

Imports of Mollusks and Other by Country of Origin (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Korea North	69,926	37,396	81,101	88,153
Indonesia	29,050	39,829	51,076	36,829
Japan	31,162	57,669	45,002	29,719
Korea South	32,609	38,597	32,333	9,625
China	35,672	19,690	21,397	13,208
United States	74,222	38,657	20,216	18,909
New Zealand	4,992	7,512	18,382	8,786
Peru	20,420	27,181	14,536	16,325
Others	125,334	165,217	50,881	69,511
Total	423,387	431,748	334,924	291,065
$/Ton	1,904	1,936	2,718	2,962

Source: Global Trade Atlas

Exports of Fish Fillet by Destination (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
United States	270,565	234,508	222,004	177,558
Japan	157,660	152,309	159,837	131,295
Germany	129,618	128,919	129,652	97,067
United Kingdom	55,260	46,244	47,820	42,290

France	40,808	44,461	46,425	36,605
Canada	29,315	25,343	32,119	25524
Mexico	24,595	26,277	30,913	18334
Poland	32,322	31,130	30,360	23836
Korea South	25,161	26,018	28,083	22243
Brazil	57,833	40,843	26,643	26127
Spain	26,874	22,711	26,615	21707
Netherlands	20,000	17,350	19,978	20412
Israel	13,973	15,073	18,029	12517
Others	171,463	151,307	165,622	144,761
Total	1,055,447	962,493	984,100	800,276
$/T	4,435	4,451	4,308	4,428

Source: Global Trade Atlas

Exports of Prepared and Preserved Crustacean and Mollusks by Destination (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
Japan	106,098	100,682	104,768	86,906
United States	81,544	73,710	81,610	77,857
Korea South	32,863	30,694	32,640	27,266
Taiwan	19,663	18,285	23,913	29,898
Hong Kong	20,892	17,520	18,770	16,300
Russia	16,759	11,165	13,050	10,023
Japan	106,098	100,682	104,768	86,906
Others	87,919	72,166	72,989	70,255
Total	365,738	324,222	347,740	318,505
$/Ton	10,338	10,066	9,762	10,144

Source: Global Trade Atlas

Exports of All Tilapia Products by Destination (Volume: Tons)

Country/Year	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
United States	178,110	166,505	141,355	106,387
Mexico	51,565	49,518	62,429	47,256
Cote d Ivoire	22,291	24,282	35,959	28,065
Israel	12,258	13,030	16,838	12,695
Iran	9,424	10,833	16,358	11,589
Zambia	15,013	14,909	11,591	10,971

Kenya	1,241	3,773	8,315	9,496
Russia	7,589	6,316	6,426	8,954
Cameroon	10,611	8,943	6,028	5,969
Others	94,866	94,500	89,147	87,811
Total	402,968	392,609	394,446	329,193
$/Ton	3,763	3,317	3,115	3,017

Source: Global Trade Atlas

Exports of Tilapia Fillet Frozen by Destination (Volume: Tons)

Country	Jan-Dec 2014	Jan-Dec 2015	Jan-Dec 2016	**Jan-Oct 2017**
United States	97,971	84,029	62,513	47,355
Mexico	23,151	24,000	28,934	16,692
Iran	9,286	10,716	16,358	11,426
Israel	9,415	10,856	14,140	10,571
Russia	6,878	4,110	4,655	5,105
Spain	3,669	2,429	3,371	2,709
Others	20,000	17,112	16,420	17,973
Total	170,370	153,252	146,391	111,831
$/Ton	4,570	3,869	3,482	3,350

Source: Global Trade Atlas