

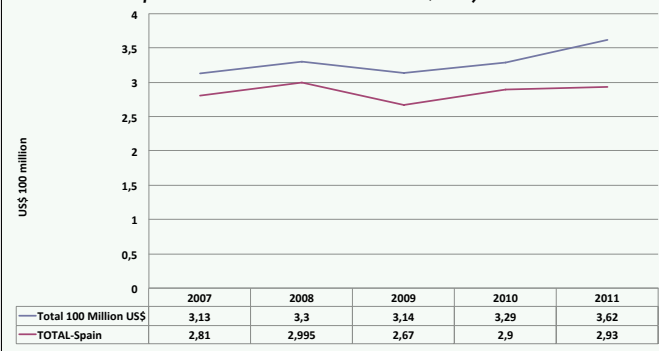
The global ornamental aquarium industry: Facts and figures – Part I

Gerald Bassleer, President, Ornamental Fish International

Statistical data are always interesting and are often quoted in technical papers and other publications. Unfortunately, we in the ornamental aquatic industry have only few resources at our disposal (FAO, UN Comtrade, International Trade Center) and their data are not always the same.

The sources employed in compiling the respective statistics are usually the customs codes for individual products, which, for 'Ornamental Fish' is 0301.10. More specifically, they are 0301.1100 for ornamental freshwater fish, and 0301.1900 for ornamental marine fish. However, accuracy depends on the person (people) who fill(s) in and file(s) the papers for customs...and here, human error can play an important role. For example, as Alex Ploeg, our late Secretary General, mentioned in *OFI Journal* 72, May 2013, Spain is not as large an exporter of ornamental fish as statistics would suggest.

Table 1: Total Export Trade in Ornamental Fish US\$ 2007-2011



Global figures

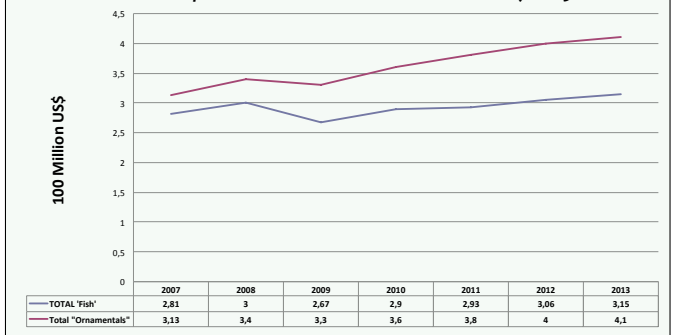
Table 1 tells us that our ornamental fish industry was worth about US\$300 million up to 2011, according to FAO. Most detailed statistics are available until 2011, although we could collect some that take us up to until 2012.

We have to be critical with the information we get from statistics relating to 'ornamental fish'. How complete or correct are the data? Spain (already mentioned above) is an example of an error! For instance:

- Is freight included?
- Are taxes included?
- How is the exchange rate worked out with regards to the US\$?
- Some countries fail listing: e.g. Congo, Kenya, etc.?
- What about other statistical codes like Shrimp (0306.2799990), Lobster (0306.22), Crabs, Hermit crabs (0306.24), Snails (0307.919090), Plants (0602.99), Corals (0307.9100), Sea cucumbers, Sea slugs, Sea stars, Live rock, Newts and aquatic frogs, etc.? These other statistical codes are mostly used by importing countries in relation to food and other non-ornamental products. As a result,

any exports/imports for ornamental purposes can easily 'disappear' within these other figures, giving wrong statistics, even though these 'aquatic products' have become an important part of our industry.

Table 2: Estimated Export Trade in Fish & Ornamentals 2007-2013

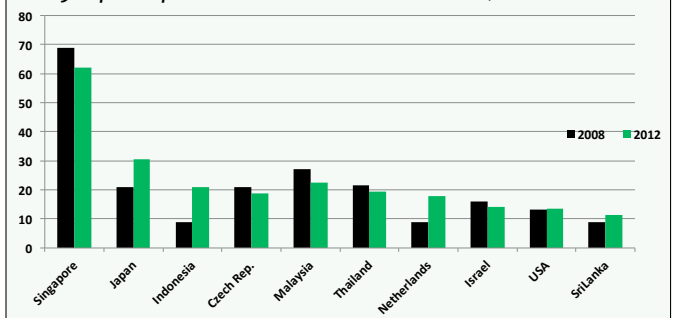


If we were to add up all aquatic ornamentals (and countries) belonging to our aquarium (not only fish) industry we might have an estimated export trade exceeding US\$400 million (Table2).

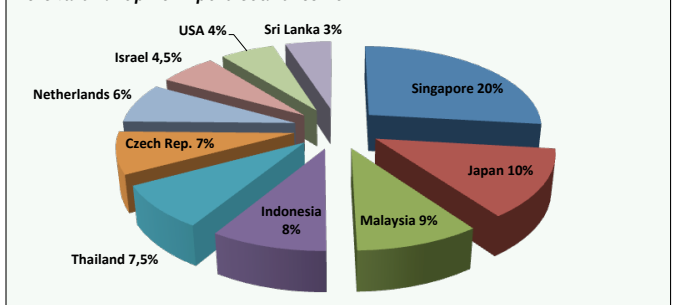
Country stats

If we look at country export statistics from 2008 until 2012, we can see that exports have dropped in Singapore, but it is still, with 20% of the total volume, the largest exporter of ornamentals. We can also observe that exports are going up in countries like Japan, Indonesia, Thailand and the Netherlands. (Table 3 & Pie Chart 1).

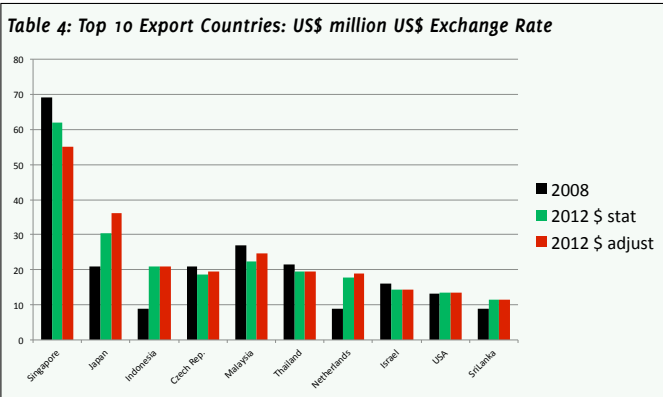
Table 3: Top 10 Export Countries: Ornamental Fish in US\$ Million:2008-2012



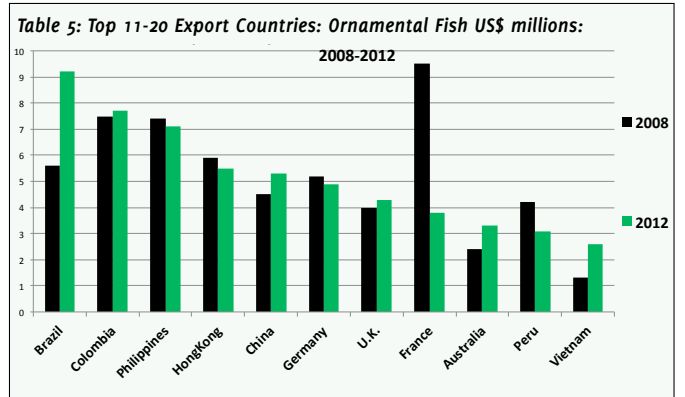
Pie Chart 1: Top 10 Export Countries 2012



If we adjust our table to the US\$ exchange rate (most statistics are in US\$ and this rate has changed drastically over the last years for several countries), Japan shows an even larger increase of 80%, and Singapore a drop of 20% (Table 4).



If we look at the next Top 11 to 20 countries we see, mostly, that Brazil, China and Vietnam are growing. The data for France were unusually high in 2008, maybe due to the activity of one exporter (Table 5).



Read more on page 26

NOTE
 In Part 2, to be published in Issue 78 of the *OFI Journal* in May 2015, I will inform you about the stats relating to IMPORTING countries. I will also discuss trends and changes in interest in our aquarium industry, expectations and warnings.





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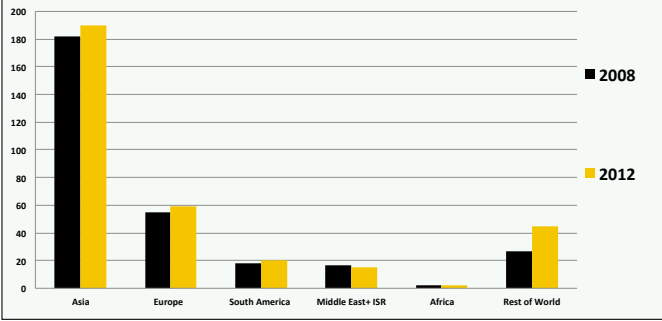

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Continental data

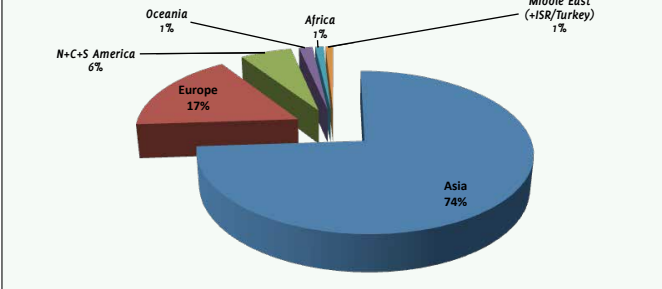
If we now take a look at export by continent (Table 6), we can see that Asia is the largest exporter and is still growing. It is interesting to note that many details for Africa are missing and that many new and small exporting countries, especially for marines, determine the increase in the Rest of the World figures (more details later on).

Table 6: Fish Exports: US\$ million 2008-2012 by Continent

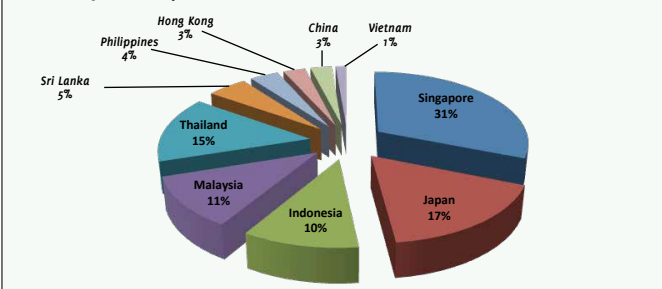


Currently, looking at the statistics for 2013 by continent, we can see how important the role of Asia is as supplier to our aquarium industry (Pie Charts 2 & 3).

Pie Chart 2: Fish Exports 2013 by Continent



Pie Chart 3: Fish Exports Asia % 2012

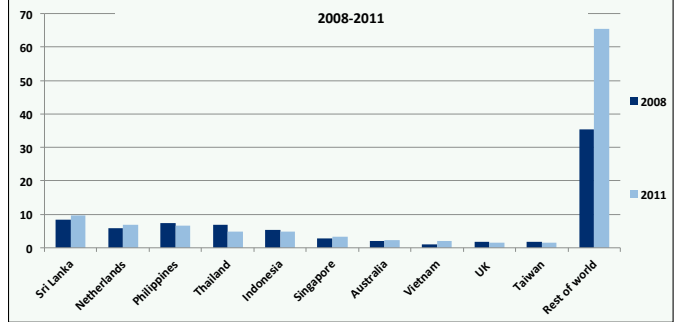


Note that we have no idea yet about the volume of production of live aquatic products for the giant local markets in China and India; this might well exceed our US\$400 million export figure. We must not forget either their potential to become two of the largest fish breeders/exporters in the near future! This is a good reason for OFI to explore more our work with regard to the Asian market (CIPS, Aquarama and GIAS 2016?) and produce information in the Chinese language.

Marine stats

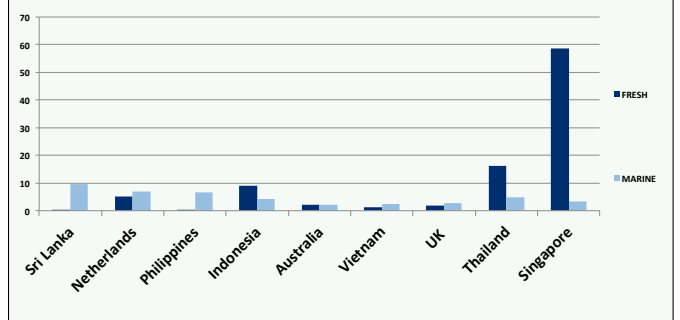
The export of marine fish has been the fastest expanding part of our industry in most countries and especially in many small countries/islands around the southern hemisphere. Sri Lanka, for example, is now the top country in the export of marine fish (Table 7).

Table 7: Ornamental Marine Fish Exports - Top 10 Countries: US\$ million



When we compare the stats for freshwater and marine fish (Table 8), it is interesting to note how important the marine fish industry has become. It used to account for only 10% of the live market, but according to our data and estimates, it might now (2014 data) represent as much as 30% of the total volume of our industry. This is due to the facts that we have greater knowledge (techniques) on how to keep and breed marine fish, that well-equipped marine aquaria are available at lower prices, and that buyers who have good income are showing a preference for colorful marine fish.

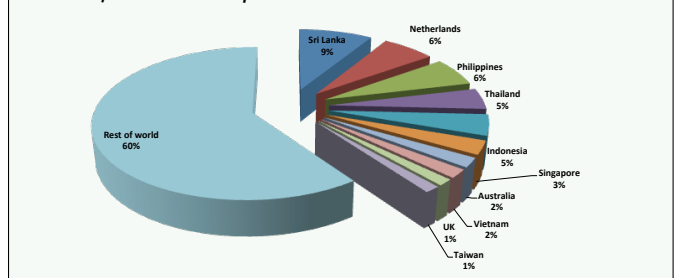
Table 8: Indicative Freshwater & Marine Trade US\$ million 2011



Singapore plays a small role in marine fish exports, but look at Sri Lanka, which has become a major player, with marine fish representing, at least, 95% of its national export volume. This is why Sri Lankan freshwater exports – at US\$1 million - hardly appear in the table! Philippines exports are 99.5% marine, while the Netherlands and UK re-export marine fish and inverts. Kenya is missing in these figures, but it is a large supplier that could be ranked as high as No. 5 in the ranking (pers. comm.)

It is also interesting to note that most marine fish come from the 'Rest of the World': countries/islands like Fiji, Maldives, Kiribati, Vanuatu, Ecuador, Dominican Republic, Cook Islands, Mauritius, Egypt, Haiti, Cuba, Mexico, Yemen, Tonga...and many others (Pie Chart 4).

Pie Chart 4: Marine Fish Exports 2011



NOTE: See P.25 for details regarding Part 2 of this report.