

The global ornamental aquarium industry: Facts and figures – Part 2

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In Issue 77 of the OFI Journal (Feb. 2015), we published Part 1 of this report focusing on the export of ornamentals. In Part 2, I will emphasize the most important statistics and facts about the import of ornamental fish. I will also highlight some major trends and developments in our industry.

Note: Please be aware that the current resources of published statistics (FAO, UN Comtrade, International Trade Center) cannot always be accepted as 100% correct, as explained in Part 1.

Import stats summary

- Increased buying of smaller, cheaper fish. This creates lower-value invoices which could contribute to a drop in statistical value.
- The USA is the largest single importer.
- Yet, the European Union (United Countries of Europe) is 3 times bigger than the USA (Tables 1 & 2).

Table 1: Ornamental Fish Imports Top 10: US\$ million: 2008-2012

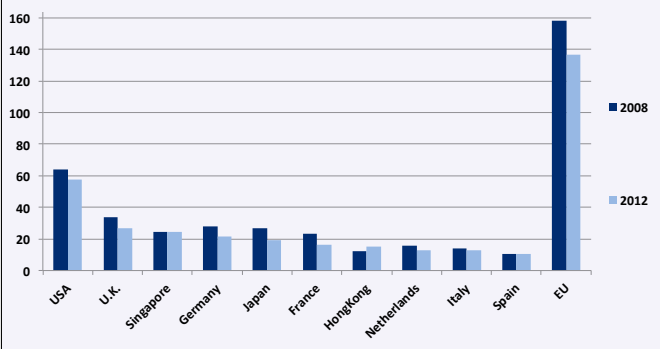
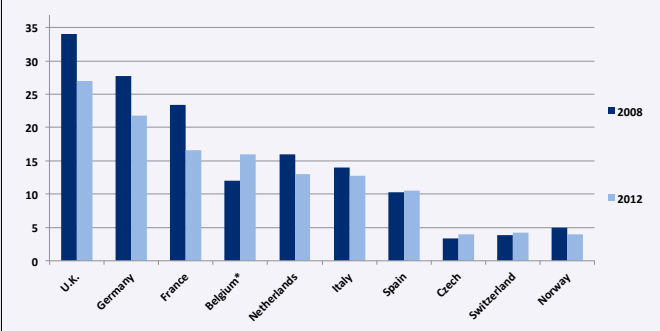


Table 2: European Imports Top 10: US\$ million: 2008-2012



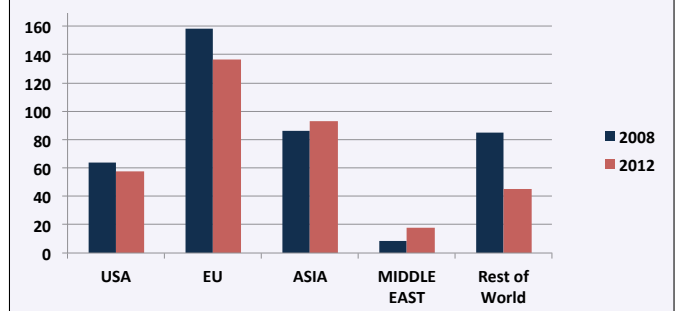
- Both USA and Europe imported less in 2012...but we must ask ourselves the questions:
 - Is this due to the economic crisis?
 - Or is it maybe due to different statistical recording methods where invertebrates and others are not recorded in fish stats and are therefore missing? (See explanation in Part 1).
- Singapore is still importing fish from neighboring countries and this is mostly for re-export.

- We notice an increase of imports into Hong Kong...for fish that are mostly re-exported to mainland China.
- Japan has lower imports owing to its economic crisis (but Japan has experienced large increases in exports).

Growing regions

The Middle East and Asia are coming up as interesting markets for the aquarium industry. This is one of the reasons why OFI is looking to extend our contacts in these regions and distribute the news about OFI in the Asian countries (Table 3).

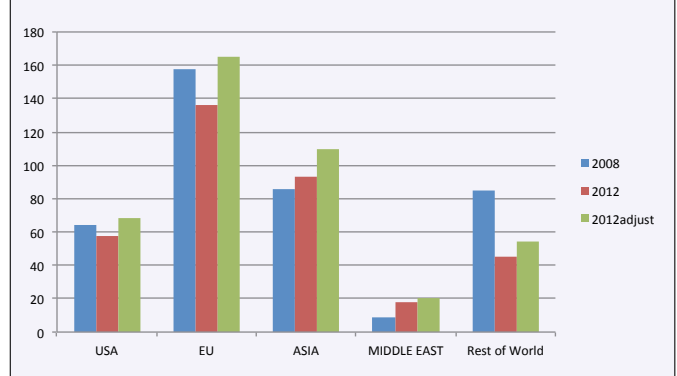
Table 3: Ornamental Fish Imports: US\$ million by Region: 2008-2012



Adjusted stats

Below is an 'adjusted' statistical overview by continent (Table 4). It includes the missing statistical data for invertebrates, corals, etc., that I mentioned in Part 1, *OFI Journal, No. 77*.

Table 4: Adjusted Statistical Overview in US\$ million by Region



In this connection, I also have to mention that India, China, Thailand, Brazil, Iran and other countries have many breeders that supply only local markets. Taken together, these account for many more million US\$ than the current volume of trade which I presented in both Parts 1 + 2 of **The global ornamental aquarium industry**. I wish we had these data available because they would show us how large our ornamental fish industry really is.



The goldfish is the top freshwater seller in the Netherlands.

PHOTO: JOHN DAWES

Trends in the market

(Tables 5, 6, 7 and 8)

- Increased knowledge: our industry is still young (since 1950s?) but we are becoming more professional every year.
- High tech aquaria equipment is increasing in popularity.
- Breeding expertise is also improving.
- Quality of life: we have many more cities; people have higher \$\$\$\$ incomes.
- We have to realize we live in a New Era: the 'Anthropocene' = mankind makes non-reversible changes; also some to our advantage!
- Laws, regulations and ethics don't just exert a negative influence on our industry; we should not forget the positive influence: more awareness, more care, more knowledge, better quality, better service, etc.
- Increased variety of fish species: more color strains, more modified species, new varieties (also wild), many more tank-raised marine fish and corals, etc.

Freshwater 24 Top Sellers in The Netherlands

Note: Entries in blue = invertebrates (ref.: Aquafarm International/NL)

- | | |
|------------------------------|--------------------------------------|
| 1. Goldfish (color var.) | 13. Swordtail |
| 2. Guppy | 14. <i>Plecostomus</i> |
| 3. Cardinal tetra | 15. <i>Otocinclus</i> |
| 4. Neon tetra | 16. Clown loach |
| 5. Corydoras | 17. <i>Beaufortia/Sewellia</i> |
| 6. Rummynose tetra | 18. <i>Ramirezi dwarf</i> cichlid |
| 7. Platy | 19. <i>Apl. normani</i> bleu eye |
| 8. Oranda/Fantail | 20. <i>Gyrinocheilus aymonieri</i> |
| 9. Molly | 21. <i>Neocardina crystal red</i> |
| 10. <i>Ancistrus</i> | 22. <i>Betta splendens</i> (male) |
| 11. <i>Colisa</i> | 23. <i>Kryptopterus</i> glass cat |
| 12. <i>Caridina japonica</i> | 24. <i>Cambarellus dwarf</i> lobster |

Table 5: Freshwater 24 Top Sellers in The Netherlands

- Increased variety of aquatic life kept in our home aquaria: i.e. corals, snails, shrimps, lobsters, crabs, plants for aquascaping; soon there will also be more aquatic invertebrates or aquatic insects (i.e. water beetles?)
- Increased buying of smaller, cheaper fish = creating lower value of invoices = possible contribution to a drop in statistical value.
- We are seeing a different kind of fishkeeper: the aquarium has become part of the decoration for the home and not so much as a 'hobby'!
- Fewer larger aquaria, more nano-aquaria and with new trends in aquascaping and marine reef mini eco-systems.
- Fewer large, expensive fish; more small, community, colorful fish which are easy to keep.
- More than just fish....also shrimps, snails, etc.
- More marine aquaria and aquascaping = these are still the serious hobbyists.

Marine 25 Top Sellers in The Netherlands

35% are invertebrates!

Note: Entries in blue = invertebrates (ref.: De Jong Marinelife/NL)

- | | |
|--|------------------------------------|
| 1. <i>Lysmata wurdemani</i> | 13. <i>Dascyllus</i> assorted |
| 2. <i>Clibanarius tricolor</i> | 14. <i>Nemateleotris magnifica</i> |
| 3. <i>Tectus</i> spp. | 15. <i>Zebrosoma flavescens</i> |
| 4. <i>Trochus</i> spp. | 16. <i>Labroides dimidiatus</i> |
| 5. Turbo grazer | 17. <i>Paracanthurus hepatus</i> |
| 6. <i>Amphiprion ocellaris</i> | 18. <i>Lysmata amboinensis</i> |
| 7. <i>Chromis viridis</i> | 19. <i>Grama lorreto</i> |
| 8. <i>Chrysiptera/Parasema/Cyanea</i> | 20. <i>Paguristis cadenati</i> |
| 9. <i>Pteropsynchiropus splendidus</i> | 21. <i>Pseudanthias</i> spp. |
| 10. <i>Pseudocchromis</i> spp. | 22. <i>Hermit crabs</i> spp. |
| 11. <i>Valenciennea</i> spp. | 23. <i>Buccinum corneum</i> |
| 12. Gobies assorted | 24. <i>Salarias fasciatus</i> |
| | 25. <i>Blenny</i> assorted |

Table 6: Marine 25 Top Sellers in The Netherlands

25 Top Sellers in the USA

Note: Entries in blue = invertebrates (ref.: Segrest Farms/USA)

- | | |
|---|---------------------------------------|
| 1. <i>Paracheirodon innesi</i> | 13. <i>Hymenochirus Dwarf</i> Frog |
| 2. <i>Carassius auratus</i> Goldfish | 14. <i>Carassius auratus</i> Fantail |
| 3. <i>Natantia Ghost shrimp</i> | 15. <i>Danio rerio</i> orange Glofish |
| 4. <i>Hyphessobrycon herbertaxelrodi</i> | 16. <i>Gymnocorymbus ternetzi</i> |
| 5. <i>Liposarcus anisitsi</i> Pleco small | 17. <i>Gyrinocheilus aymonieri</i> |
| 6. <i>Puntius tetrazona</i> | 18. <i>Xiphophorus maculatus</i> |
| 7. <i>Hyph. callistus callistus</i> | 19. <i>Liposarcus Pleco med</i> |
| 8. <i>Danio rerio</i> | 20. <i>Danio rerio</i> Longfin |
| 9. <i>Poecilia reticulata</i> | 21. <i>Paracheirodon axelrodi</i> |
| 10. <i>Danio rerio</i> red Glofish | 22. <i>Hyph. flammeus</i> "orange" |
| 11. <i>Puntius titteya</i> | 23. <i>Xiphophorus hellerii</i> |
| 12. <i>Danio rerio</i> green Glofish | 24. <i>Corydoras</i> sp. mix |
| | 25. <i>Phoxinus neogaeus</i> feed |

Table 7: 25 Top Sellers in the USA

Marine 25 Top Sellers in the USA 60% are invertebrates!

Note: Entries in blue = invertebrates (ref: Segrest Farms/USA)

- | | |
|--|--|
| 1. Blue Leg Hermit Crab Sml | 14. Cerith Snail Sml |
| 2. Astrea Turbo Snail Atlantic Sml | 15. Thin Stripe Hermit Crab Sml |
| 3. Zebra Turbo Snail Med | 16. Scarlet Reef Hermit Crab Sml |
| 4. Assorted Damsel Sml | 17. Skunk Cleaner Shrimp Med |
| 5. Emerald Crab Sml | 18. Black Margarita Slime Eater Snail Sml |
| 6. Condylactus Anemone Med | 19. Yellowtail Blue Damsel Sml |
| 7. Peppermint Shrimp Sml | 20. Royal Gramma Med |
| 8. Mexican Turbo Snail Med | 21. Chocolate Chip Starfish Med |
| 9. Green chromis Sml | 22. Ocellaris Clownfish Tank Raised Sml |
| 10. Mexican Red Leg Hermit Crab Sml | 23. Coral Beauty Angel Med |
| 11. Nassarius Snail Sml | 24. Lawn Mower Blenny Med |
| 12. Firefish Med | 25. Feather Duster Philippines Med |
| 13. Ocellaris Clownfish Tank Raised Med | |

Table 8: Marine 25 Top Sellers in the USA



Clownfish feature on all 'top' lists of marine fish. PHOTO: JOHN DAWES



Depending on country/region, invertebrates can account for up to 60% of all marines sold. PHOTO: JOHN DAWES

Marine 25 Top Sellers in the UK (in alphabetical order) 35% are invertebrates!

Note: Entries in blue = invertebrates (ref: TMC/UK).

- | | |
|-------------------------------------|-------------------------------------|
| 1. Blue Cheek Goby | <i>Valenciennesa strigata</i> |
| 2. Bubble Anemone - Coloured | <i>Entacmaea quadricolor</i> |
| 3. Button Coral | <i>Acanthastrea sp.</i> |
| 4. Button Polyp | <i>Zoanthus spp.</i> |
| 5. Chalk Goby | <i>Valenciennesa sexguttata</i> |
| 6. Chromis - Green | <i>Chromis viridis</i> |
| 7. Cleaner Shrimp | <i>Lysmata amboinensis</i> |
| 8. Cleaner wrasse | <i>Labroides dimidiatus</i> |
| 9. Copperband Butterfly | <i>Chelmon rostratus</i> |
| 10. Coral Beauty | <i>Centropyge bispinosus</i> |
| 11. Fire Shrimp | <i>Lysmata debelius</i> |
| 12. Firefish - Ind O | <i>Nemateleotris magnifica</i> |
| 13. Flame Angel | <i>Centropyge loriculus</i> |
| 14. Gramma - Royal | <i>Gramma loreto</i> |
| 15. Hammerhead - Cultured | <i>Euphyllia sp.</i> |
| 16. Lipstick Tang - Ind O | <i>Naso elegans</i> |
| 17. Mandarin | <i>Pteropsynchiropus splendidus</i> |
| 18. Powder Blue Tang | <i>Acanthurus leucosternon</i> |
| 19. Regal Tang | <i>Paracanthurus hepatus</i> |
| 20. Staghorn | <i>Acropora spo.</i> |
| 21. Tank Bred Cardinal - Emperor | <i>Pterapogon kauderni</i> |
| 22. Tank Bred Clown - Common | <i>Amphiprion ocellaris</i> |
| 23. Wreck Fish - Ind O | <i>Pseudanthias squamipinnis</i> |
| 24. Wreck Fish - Pacific | <i>Pseudanthias cheirospilos</i> |
| 25. Yellow Sailfin Tang | <i>Zebrasoma flavescens</i> |

Table 9: TOP 25 Marine sales in alphabetical order from TMC/U.K.

The future: our expectations and warnings

- The market continues to grow and new markets will come up.
- For exporters and importers I would recommend: increase your variety and species! Marines should become part of your business.
- Follow the market interests and new markets. Follow changes in demand: shrimps, invertebrates, aquatic insects, etc.
- Install a good fish health management plan:
 - Investment in bio-security becomes an obligation.
 - Important to plan good welfare for all your aquatic creatures.
 - Good quality of fish means a sound business and higher profits.
- Work in accordance with laws and regulations: get involved with your national authorities, since most laws and regulations are adapted and implemented at national level (OFI tries to get involved at the international level, but you, as an OFI member, should be involved with your national authorities).
- Prevent invasive alien species (IAS) = introduction of invasive aquatic species in your local river or lake or your country could close your business!!!
- Stay informed by attending trade shows and conferences with OFI.