

Brazil has big plans to boost tilapia output

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Brazil has plans to dramatically grow its tilapia production in the future, after reporting a 20 percent production hike for 2009.

In 2009 the total volume of aquaculture in Brazil increased by 13.8 percent, and tilapia aquaculture by 19.6 percent, said Oystein Falch of consulting company Inocap that has had a look at the numbers in a recently released report by the Brazilian Ministry of Fisheries and Aquaculture -- Ministerio da Pesca e Aquicultura (MPA).

In two years, since 2007, aquaculture volume increased by 43.8 percent and tilapia by 39.8 percent.

In 2009 cultured volume was 415,649 tons, out of which tilapia was 132,958 tons. Tilapia is experiencing the greatest increase in volume with an increase of 21,831 tons. If MPA is right about its forecast of 570,000 tons of aquaculture by the end of 2011, and if tilapia maintains its relative share of 32 percent, tilapia production will increase of about 50,000 tons over the next couple of years, said Falch. "Current activity level in Brazilian tilapia aquaculture indicates that tilapia is likely to increase its relative share."

In the case that tilapia maintains the same annual increase as in 2009 of 19.6 percent for the next two years, the production of tilapia will increase by 57,000 tons to 190,000 tons, he said. "In both scenarios, Brazil is significantly reducing the interval to the fifth place among the world's largest tilapia producers. Brazil is already by far the largest tilapia producer in the Americas, and the second largest nation outside Asia only passed by Egypt."

MPA establishment

With the establishment of the MPA, Brazil has made an important step in the direction of putting fishing and aquaculture on the political agenda.

MPA was created in June 2009 and Brazil got their first Minister of Fisheries and Aquaculture. MPA replaced the Special Secretaries for Aquaculture and Fisheries - Secretaria Especial da Aquicultura e Pesca (SEAP / PR) - which had existed since 2003. In August 2008, President Luiz Inácio Lula da Silva announced the development plan "More Fisheries and Aquaculture - 2008/2011" ("Mais Pesca e Aquicultura - 2008/2011"), with specific volume target for 2011.



The report published by MPA in August this year maintains the targets for 2011.

Inocap has compared numbers in the MPA report with numbers from FAO Fish Stat Plus, one of the most frequently quoted data sources for fisheries and aquaculture statistics.

The time series in the MPA report are mostly from 2003 to 2009. Latest available figures from FAO are for 2008. For the years 2003 to 2007 there are only minor discrepancies, but for 2008 MPA reports a total volume of fisheries and aquaculture that is 11 percent higher than FAO's numbers. FAO reports that they did not receive figures from Brazil for their year 2008 compilation and had to make their own estimates.

Until 2007 the Brazilian Institute of Environment and Renewable Natural Resources - Instituto Brasileiro do Meio Ambiente e dos Recursos Naturais Renováveis (IBAMA) -- was responsible for collecting and reporting national statistics for the fisheries and aquaculture. In 2008 this responsibility was moved and is now with the MPA. In the transition there was made changes in the systems for data collection and reporting.

Oystein Falch of consulting company Inocap.

The present report from the MPA shows an increase in aquaculture volume of 26.4 percent from 2007 to 2008. A source in the MPA does not rule out the chance that some of the sharp increase can be explained by changes to the systems for data collection and reporting.

MPA reports that Brazil's total fisheries and aquaculture production for 2009 was 1,240,814 tons, out of which fishing accounted for 825,165 tons (67 percent) and aquaculture for 415,649 tons (33 percent).



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MPA's forecast for 2011 is a total production of 1.43 million tons, out of which 860,000 tons from fisheries and 570,000 tons from aquaculture. Over the two year period from 2009 to 2011 this implies an expected increase of 15 percent, where fisheries increase by 4 percent and aquaculture by 37 percent, said Falch.

Three fish species account for 59 percent of all aquaculture volume. These species are cachama -- or tamboqui -- with 11 percent, shrimp 16 percent and tilapia 32 percent.

Cachama had the same percentage increase as tilapia with 19.6 percent to 46,454 tons in 2009. Shrimp declined by 7.2 percent to 65,198 tons. The production of shrimp has been virtually unchanged since 2005.

Over the past five years, since 2004, the average annual increase has been 2.1 percent in fisheries and 10.8 percent in aquaculture.

In 2009, fisheries production was distributed with 585,672 tons (71 percent) on marine and 239,493 tons (29 percent) on inland (freshwater). The distribution in the period from 2003 to 2008 has been more or less unchanged at about 68 percent for marine and 32 percent for inland.

In 2009, the distribution of aquaculture was 19 percent marine and 81 percent inland (freshwater). Marine aquaculture has declined in volume over the past six years and is now at 78,296 tons, while inland has almost doubled in volume to 337,353 tons.

Shrimp accounts for almost the entire volume of marine aquaculture, which implies that marine is including brackish waters.



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