China Aquaculture Industry Report, 2015-2018

Description: With the improvement of cultivation technology and the steady growth in per-capita consumption of aquatic products, both the output value of Chinese fishery industry and the output of aquatic products keep growing year after year. In 2014, the gross output value of China's fishing industry amounted to RMB2.0859 trillion, and the added value was up to RMB971.8 billion; the national output of aquatic products totaled 64.615 million tons, a rise of 4.7% from a year earlier, of which the output of aquaculture reported 47.484 million tons, up 4.6% year on year.

Freshwater culture is the main part of aquaculture in China, with its output holding more than 60%. In 2014, the freshwater cultured output reached 29,357.6 kt, accounting for 61.8%; and mariculture output hit 18,126.5 kt, occupying 38.2%. In freshwater aquiculture, fishes are the primary varieties, making up about 88% of total output of freshwater culture; while in mariculture, the shellfishes see the highest output, an above-70% share of total output of seaculture.

The regions like Guangdong, Shandong, Fujian, Jiangsu and Hubei are the key aquaculture provinces in China, with their total output sweeping over 50% of national output. Elaborately, Guangdong is the largest province in terms of aquaculture, with equal output of freshwater culture to that of mariculture; Fujian and Shandong give priority to seaculture; while Jiangsu and Hubei are mainly involved in freshwater breeding.

Chinese aquaculture industry is composed of individual farmers, cooperatives and enterprises, among which aquaculture enterprises are in the advantageous position in competition, but with inadequate power of exerting influence on the market. Chinese aquaculture companies consist mainly of ZONECO Group, Zhanjiang Guolian Aquatic Products Co., Ltd, Dalian Yi Qiao Sea Cucumber Co., Ltd, Shandong Oriental Ocean Sci-Tech Co., Ltd, Shandong Homey Aquatic Development Co., Ltd., Pure Pearl Group Co., Ltd and Dahu Aquaculture Company Limited. In 2014, the total aquaculture output of ZONECO Group, Zhanjiang Guolian Aquatic Products Co., Ltd and Dalian Yi Qiao Sea Cucumber Co., Ltd was merely 82.65 kt, just making up 0.174%.

Zhanjiang Guolian Aquatic Products Co., Ltd is China’s state-level penaeusvannamei genetics & breeding center, with the revenue from aquaculture business in 2014 reaching RMB1.988 billion with a share of 0.23% in Chinese aquaculture market. The company is now endeavoring to transfer to be a global aquatic marketing platform and aquatic food maker; also, it strengthens the domestic market construction and brand promotion.

ZONECO Group is primarily focused on seaculture business, boasting the largest clear seawaters in China. In 2014, the aquaculture output of the company was up to 53.43 kt, sharing 0.113% of national total output in the same period. In August 2015, the company publicized the preplan of non-public offering of shares and planned to raise RMB1.45 billion for fingerling platform construction project, O2O new business model construction project and otherwise, in a bid to accelerate its transition towards a food enterprise.

Dahu Aquaculture Company Limited is the largest freshwater fish base and in possession of about 1.8 million mu (1mu=1/15 hec.) of water area in China, making up 4.9% of the area of reservoirs and lakes with aquaculture across the country. It has been focusing on the construction of its marketing network and comprehensive industrial chain by means of acquisitions and capital increase over the recent two years.

China Aquaculture Industry Report, 2015-2018 highlights the following:

Development environment of China aquaculture industry report, involving industrial policy, residents’ consumption, the development of upstream and downstream sectors, etc.;
Development overview of China aquaculture industry, including status quo, mariculture, freshwater aquaculture, aquatic fingerlings, import & export, competitive landscape, prediction and outlook, etc.;
Development overview of key aquaculture regions (like Guangdong, Shandong, Fujian, Jiangsu and Hubei) in China, and the development of medium- and high-end aquatic products (such as abalone, sea cucumber, prawn, tilapia);
Operation, developments and so forth of 15 Chinese aquaculture companies.
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