

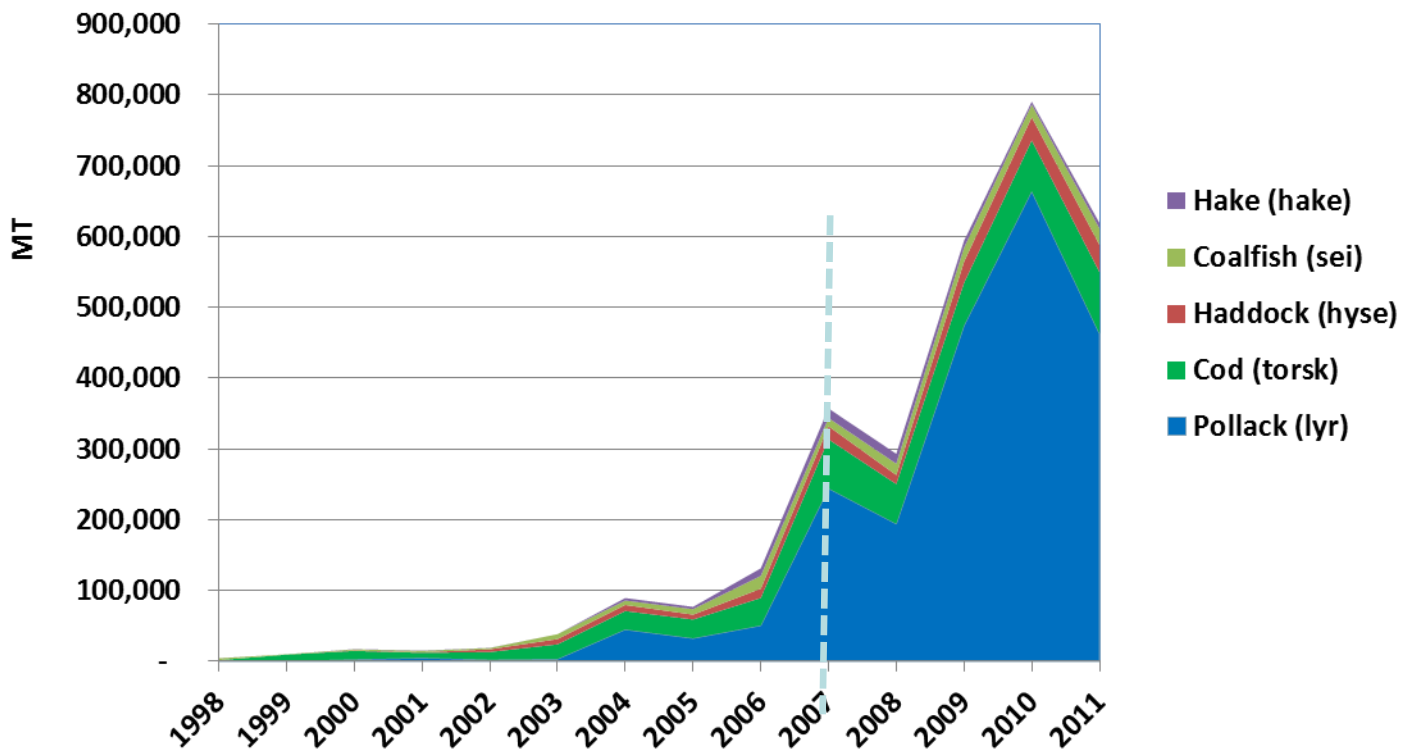
Kina – Tilførsel, Bearbeiding og Markedsutsikter

Jinghua Xie

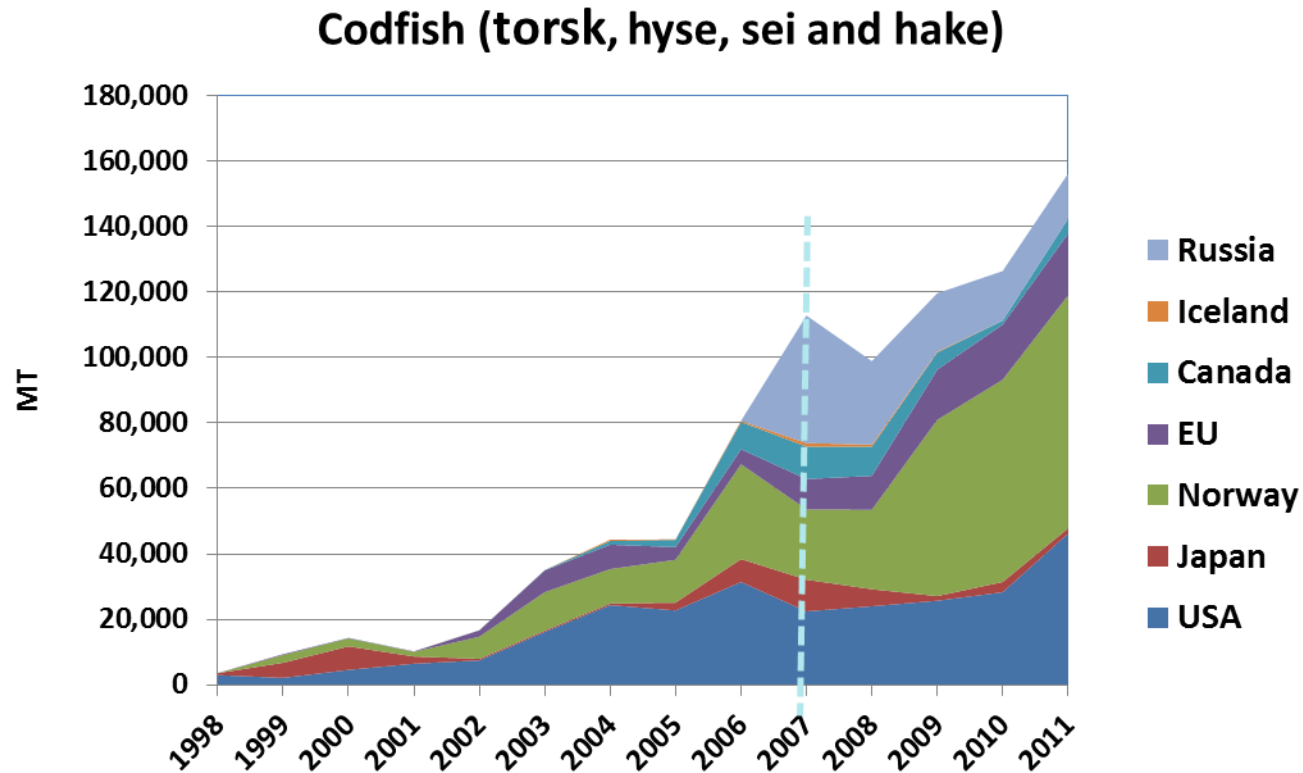
Tromsø Business School, University of Tromsø



Chinese Import of White Fish

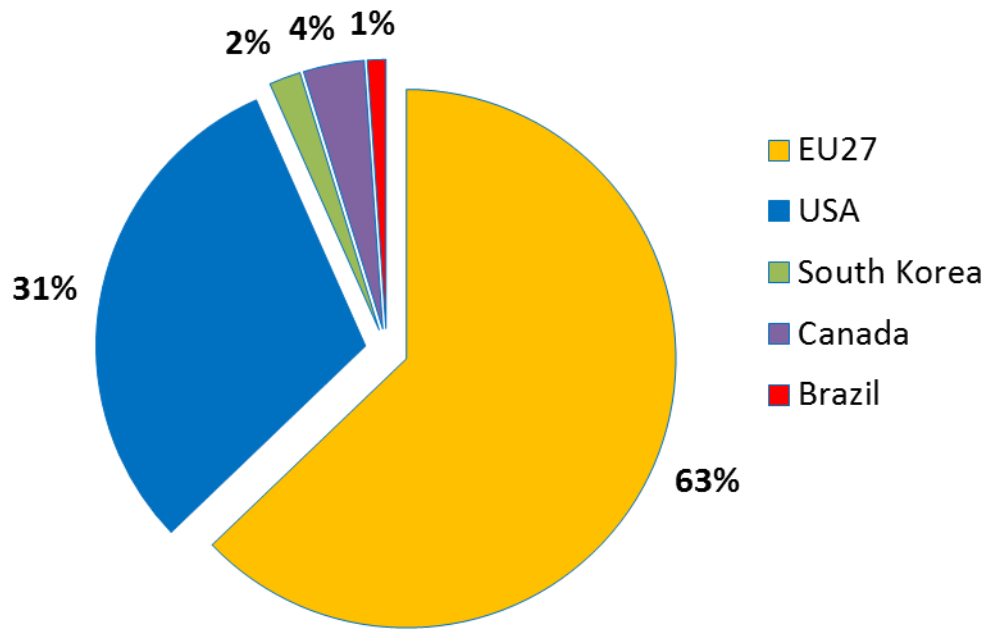


Main Exporting Countries to China



Chinese Export of White Fish

Export Markets of All Products (2008-2011)



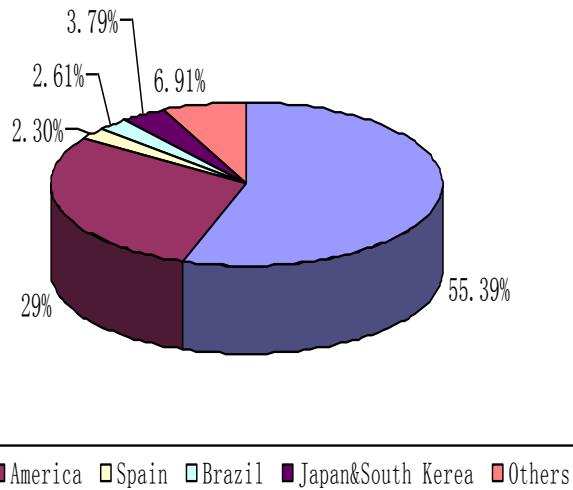


Processing

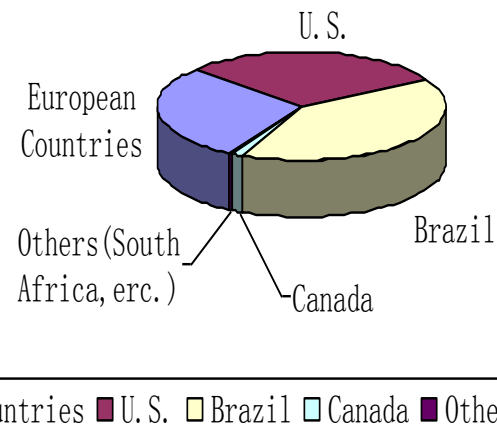




The Main Products Exporting Countries in Shandong Province



Scale Map of Main Ground Fish Exporting Countries of Dalian's Entrprises in 2011





	Import Price (\$/MT)	Export Price (\$/MT)
Pacific cod	2350-2800	4400-5000
Atlantic cod	2500-2900	4500-5000
Haddock	2400-2500	4000-4500
Pollock	1300-1400	2400-2600



- **Yield rate**

Pollack: 67%-72%

Cod: 75%-80%.

In general: 70%

- **Cost**

Total: \$1010-\$1060/T

Labor: 49%

Water& electricity: 10%.

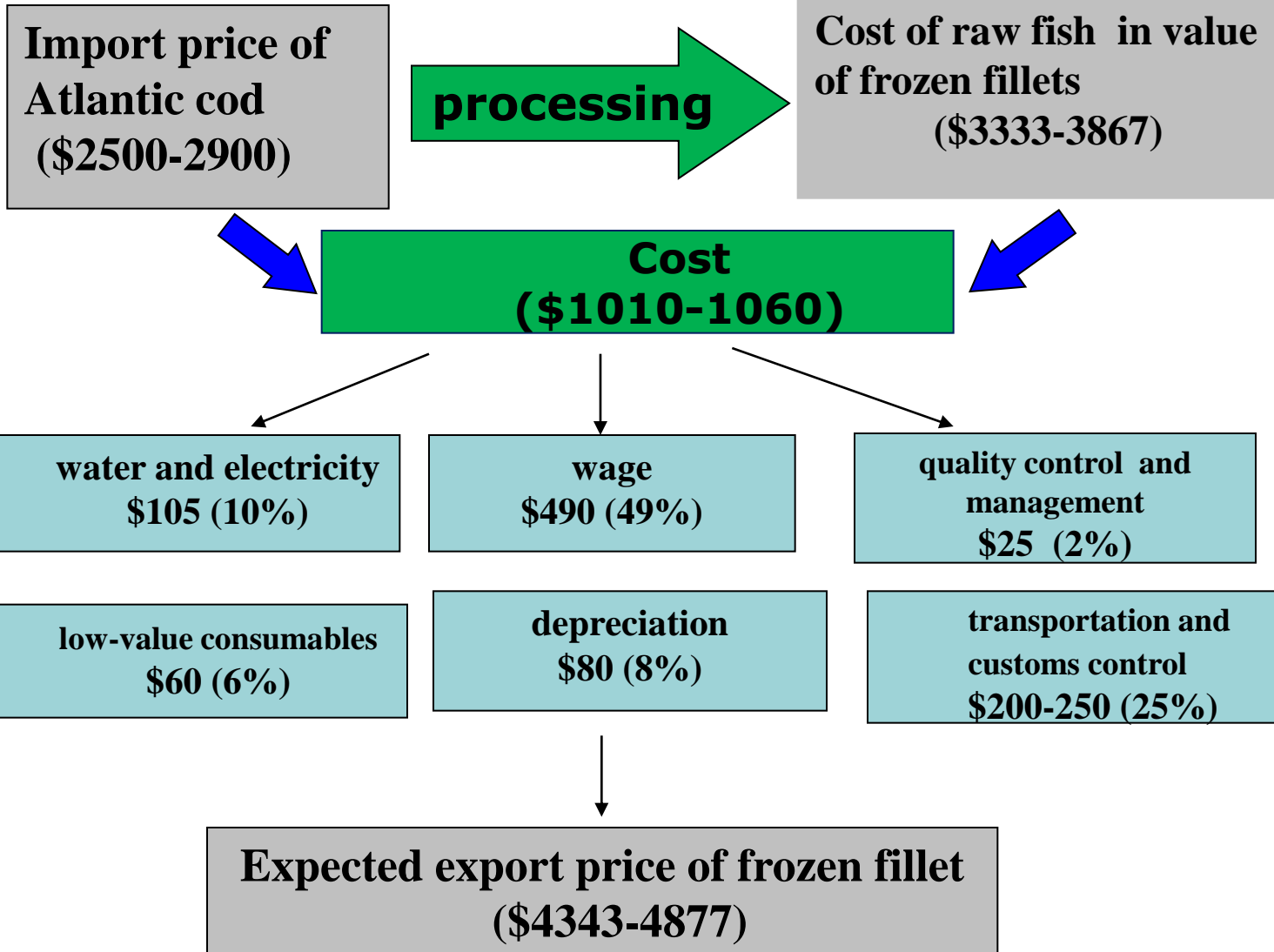
- **Profit**

Maximum: \$100-200/T





2012 Cod





(\$4343-4877)

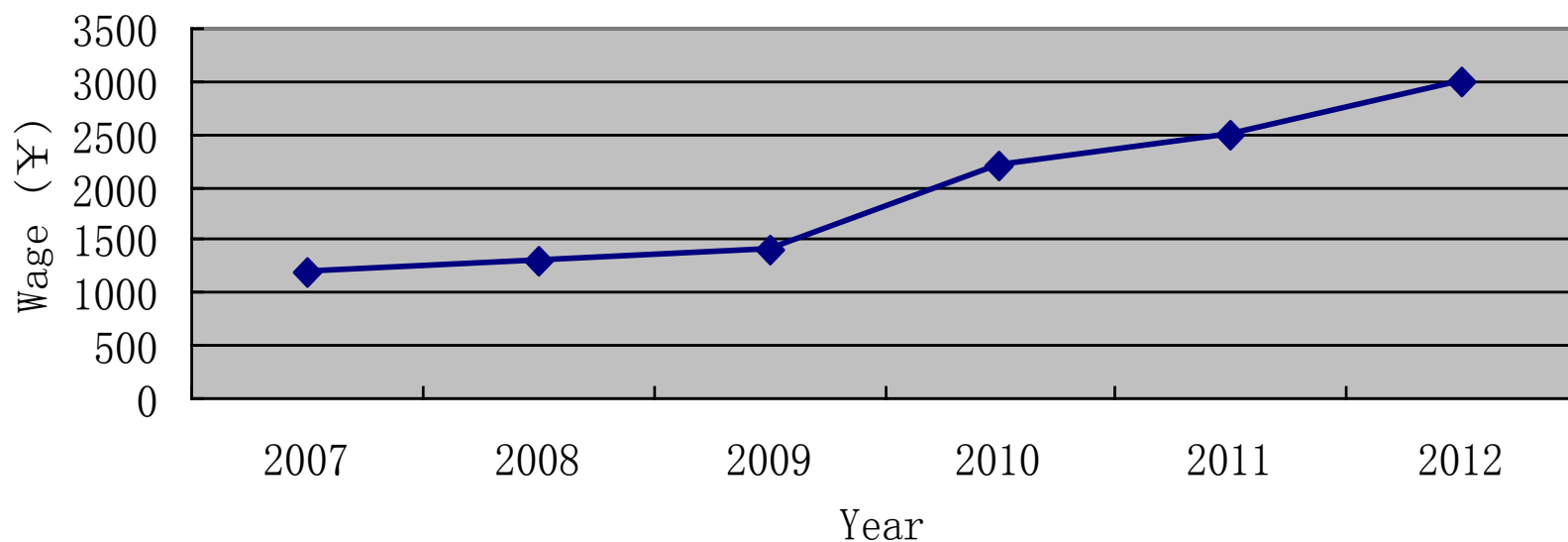
	Import Price (\$/T)	Export Price (\$/T)
Pacific cod	2350-2800	4400-5000
Atlantic cod	2500-2900	4500-5000
Haddock	2400-2500	4000-4500
Pollock	1300-1400	2400-2600





Increasing Wage Cost

The Trend of Workers' Average Wage in Aquatic Product Processing Enterprises from 2007 to 2012 in Shandong Province





(\$4343-4877)

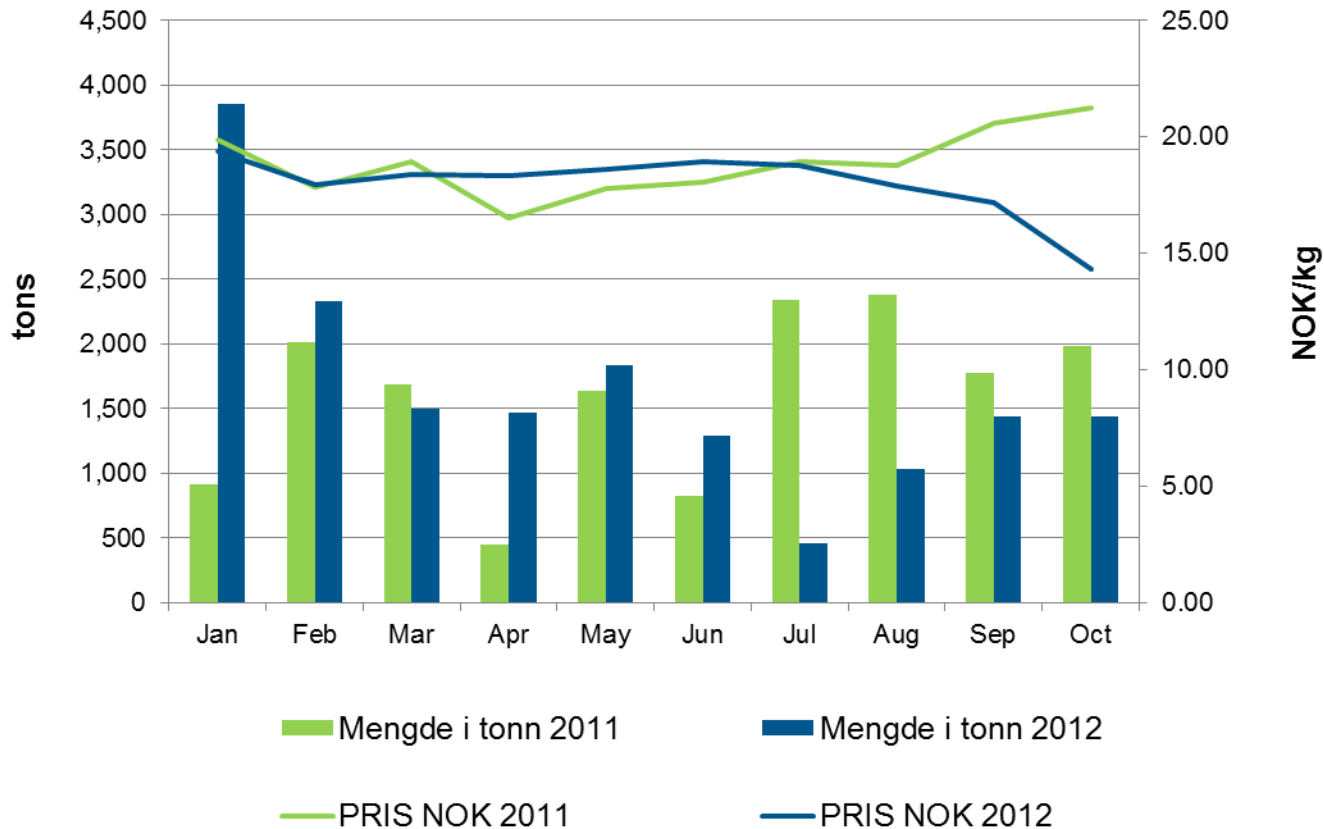
↓ \$490 - 539

(\$4392-4926)

	Import Price (\$/T)	Export Price (\$/T)
Pacific cod	2350-2800	4400-5000
Atlantic cod	2500-2900	4500-5000
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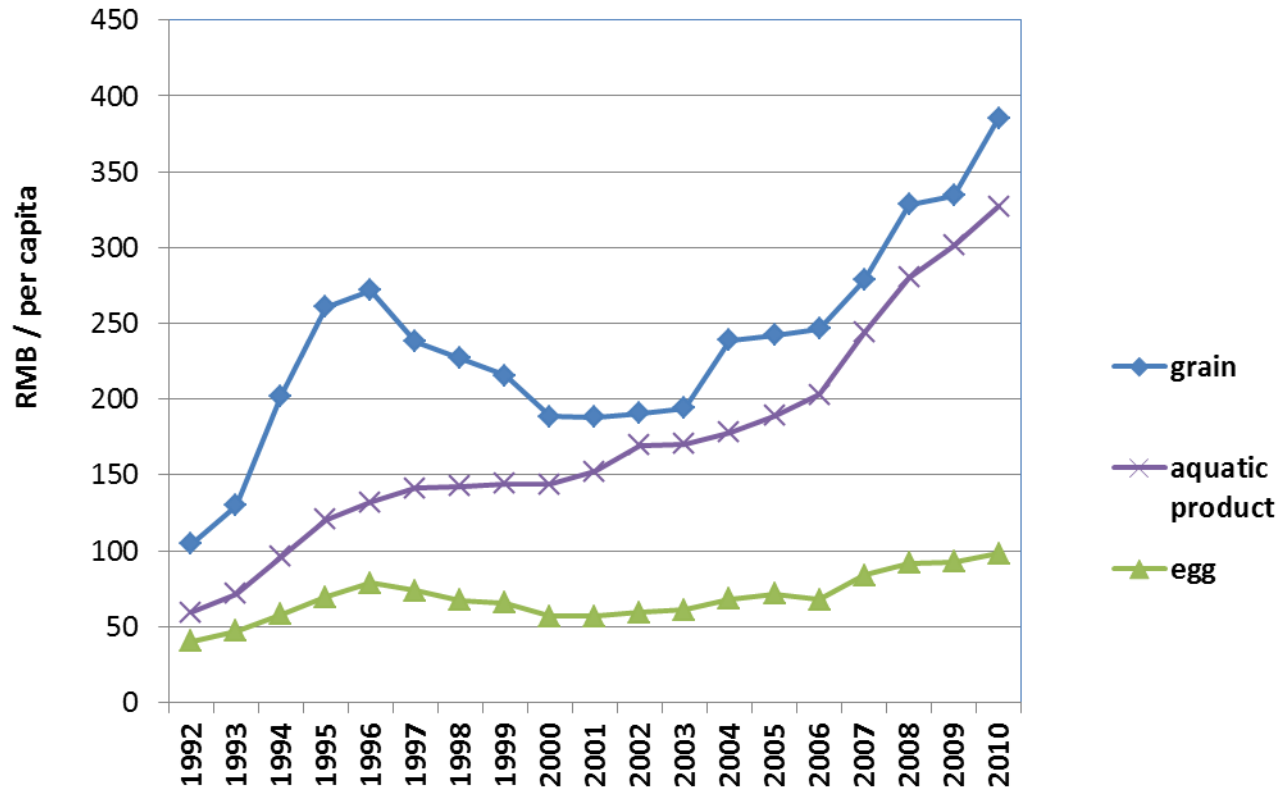
Norwegian Export to China 2012



Consumption

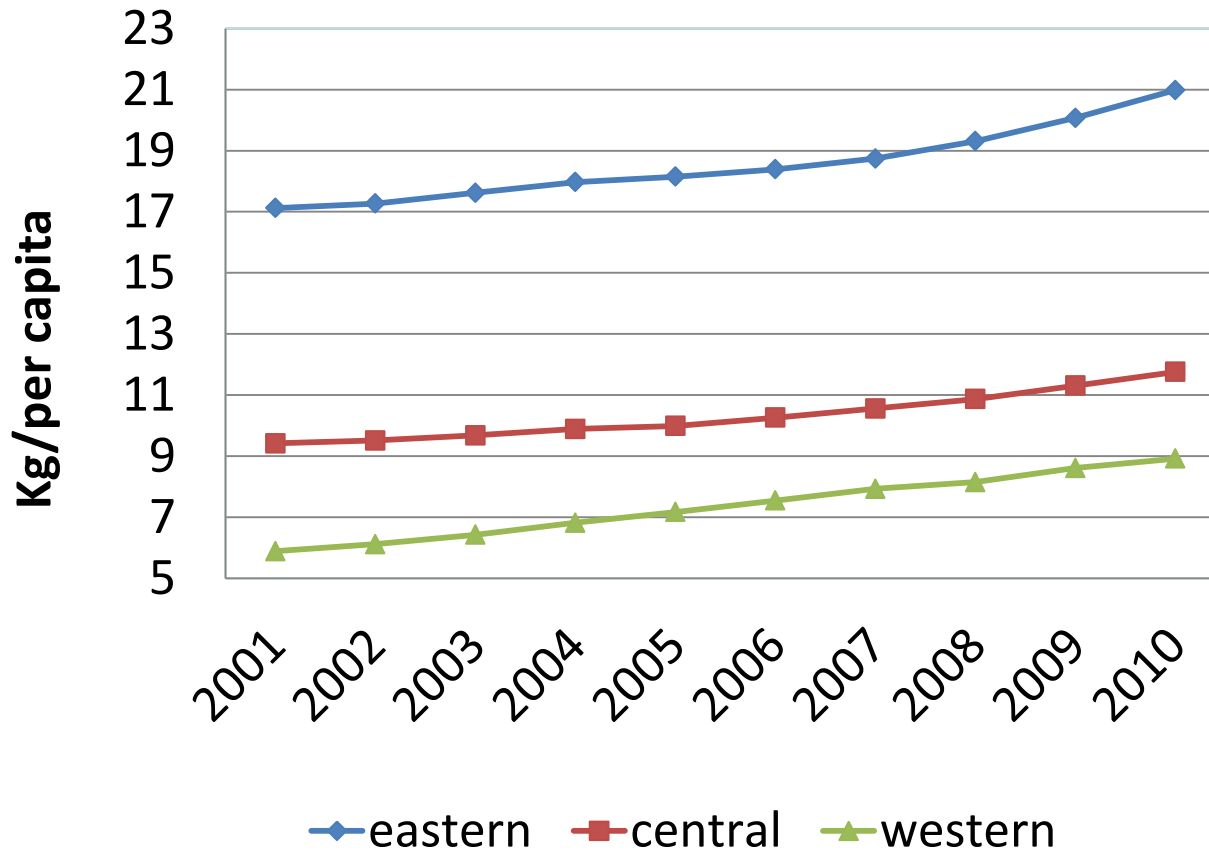


Consumption of Aquatic Products in Urban Areas



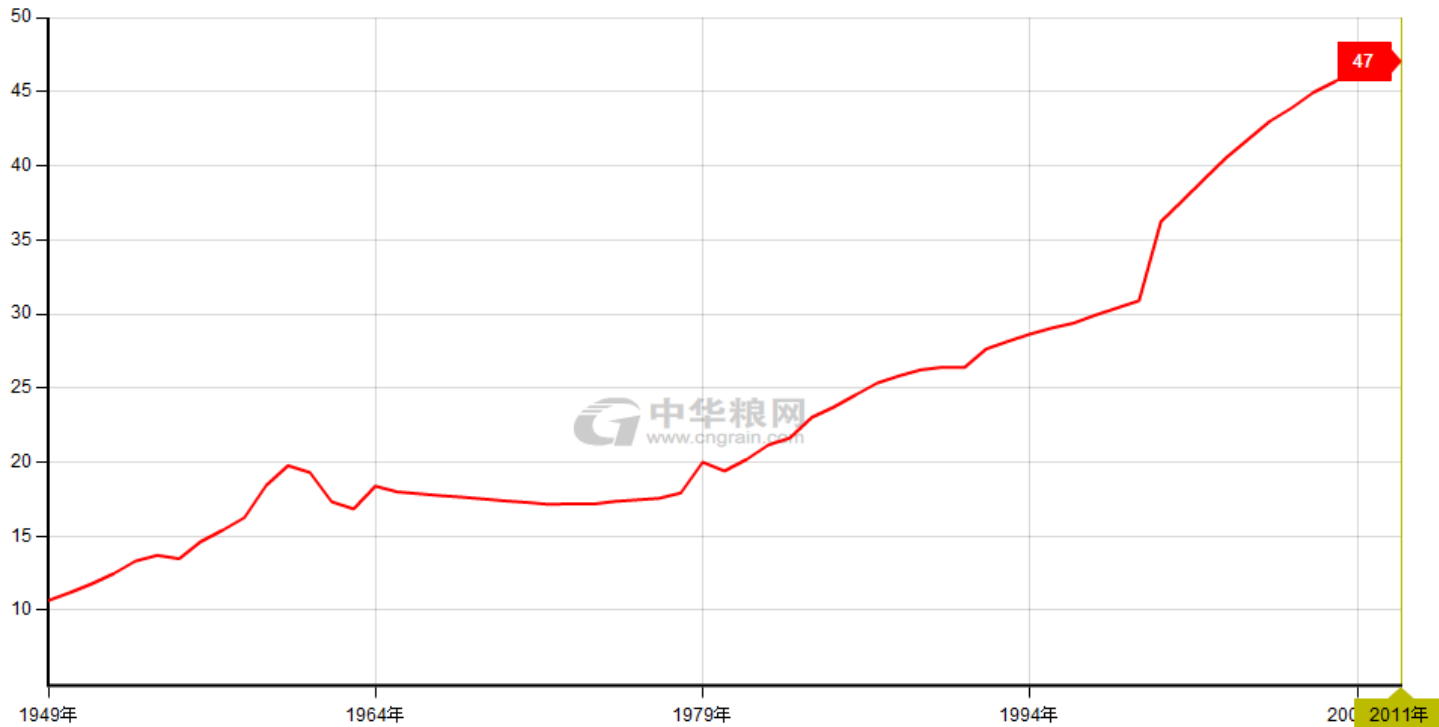
Data source: Chinese Yearly Statistics

Consumption in Different Regions



Data source: Chinese Yearly Statistics

Urbanization Rate



Source: <http://datacenter.cngrain.com/IndexMacroEcoView.aspx?MId=11&IId=32>

Products in Supermarkets of Shanghai



Products in Supermarket of Central China



Products in Supermarket of Central China



Supermarket in Qindao



Products in Supermarkets of Qingdao





Wholesale Prices

Products	Prices (RMB/kg)	Company Location
Frozen Alaska Pollock whole	2.4 (≥ 20 tons, tax not included)	Shandong
Frozen Alaska Pollock whole	9.5 (≥ 20 tons)	Heilongjiang
Frozne coalfish whole	8 (≥ 10 tons)	Shanghai
Frozen Alaska Pollock fillet	28 (≥ 10 tons)	Shandong
Atlantic frozen cod block	30 (≥ 10 tons, including transportation fees)	Shandong
Atlantic frozen cod fillet	40 (≥ 10 tons including transportation fee)	Shandong



Prices and Volume in Supermarket

4.9-5.5 RMB/package
40 packages per day



6.8 RMB/package
50 packages per day



40 RMB/ 250g



Prices and Volume in Open Market

12 -16 RMB/kg

10 kg/market/dag



Estimated Consumption Volume in China

4500 tons for processed products

+

116,700 tons for frozen whole fish

= 25% of imported Alaska pollock



Conclusion

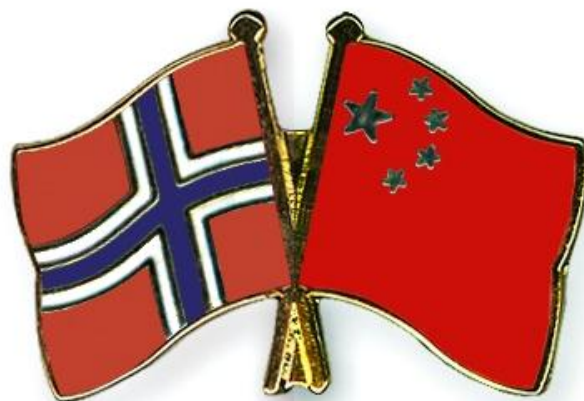
- Processing in China has been slow down due to weak demand in EU and USA, and growing cost in China.
- Only high-value added processing sector will remain in China in the next years.



Conclusion

- Domestic consumption for Alaska pollock has been tremendously growing.
- Products of Atlantic cod should be promoted and also distinguished from Alaska pollock.
- Proper market strategy and position are important.





THANK YOU

