Market and distribution of Walleye pollock

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The trend of supply
World Fishery Production of Captured whitefish by Fish species

Stable supply

source FAO yearbook Fishery and Aquaculture Statistics 2010
Supply weight of Alaska pollock

FAO yearbook Fishery and Aquaculture Statistics 2010

2011 and 2012 data are estimation by Maruha Nichiro
Product weight of Alaska pollock

source: NMFS statistic date
• 2012 data is estimation by Maruha Nichiro

by Exchange rate?
< Japan market>

Stable
Fillet supply
Main whitefish products

Main products category
- Round
- H&G (Headed and Gutted)
- Fillet
- Fillet brock
- Mince
- Surimi

A many of the H&G products are re-frozen as twice frozen products, and it’s supplied to the world market.

Source: Groundfish Forum 2011
Especially, Brazil and African fish market are rapidly growing, and this stream become more strong
- the Alaska pollock consumption has begun already
  (but in Africa, using round or H&G)
# Fillet products weight by species

## Products weight in 2010

<table>
<thead>
<tr>
<th>Species</th>
<th>Pangasius</th>
<th>Tilapia</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groundfish Forum 2011</td>
<td></td>
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</tbody>
</table>

* Pangasius means the amount of Viet Nam exports
** Tilapia is only imports in USA
### Fillet product weight - Alaska Pollock

#### Alaska pollock – total blocks and fillets

**Product weight 2010 (2009)**

<table>
<thead>
<tr>
<th></th>
<th>Blocks MT</th>
<th>Fillets MT</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA single frozen</td>
<td>105,000 (110)</td>
<td>6,000 (6)</td>
</tr>
<tr>
<td>Russia single frozen</td>
<td>25,000 (29)</td>
<td>1,000 (1)</td>
</tr>
<tr>
<td><strong>Total single frozen</strong></td>
<td><strong>130,000 (139)</strong></td>
<td><strong>7,000 (7)</strong></td>
</tr>
<tr>
<td>Double frozen est.</td>
<td>172,000 (184)</td>
<td>46,000 (49)</td>
</tr>
<tr>
<td><strong>Total pollock</strong></td>
<td><strong>302,000 (323)</strong></td>
<td><strong>53,000 (56)</strong></td>
</tr>
</tbody>
</table>

*source: Ground fish Forum 2011*
Surimi supply
Surimi product weight

Growing up! But...resource drain...

source: from SURIMI FORUM 2011
2012 data is estimation by Maruha Nichiro
Surimi products weight change in South East Asia

2012 data is estimation by Maruha Nichiro

source: SURIMI FORUM 2011
Fish paste
Fish paste products weight in main consumption countries

Total estimation = 1.5 million metric ton
Japan – large market but decreasing
USA  -stable market-

Product weight 80,000 metric tons
Items •• SURIMI (Kani-kama it means imitation crab fish pasta)
Main material •• walleye pollock, Hake and so on (it used the middle or under glade)
Korea -stable market-

Products weight 150,000 metric tons

Items: Surimi(Kani-kama, imitation crab), flied fish pasta, grilled fish paste with bamboo stick (Chikuwa), sausage and so on

Main material: Hairtail, the other fish by East south Asia (low glade), Alaska Pollock
China – explosive growing market -

Product weight = 340,000 metric tons

Items • • • Surimi (imitation crab), grilled fish paste with bamboo, Fish ball, sausage and so on

Main material • • • the other fish by Asian area (low grade ), Alaska pollock
East South Asia – historical, traditional and growing up market by population increase and economic growing

Product weight 160,000 metric tons

Items • Surimi, Flied fish pasta, grilled fish paste with bamboo stick, fish ball

Main material • golden threadfin bream, hairtail, lizardfish
Europe -stable surimi market-

Production weight 110,000 metric tons
Items • • Surimi (imitation crab, Kani-kama)
Main material • • Alaska pollack, Hake, golden threadfin bream
Russia ～ East Europe - Surimi market

Product weight 100,000 m.t
Items: Surimi (crab, kanikama), sausage
Main material: Golden threadfin bream, Alaska pollock, Hake, and so on
Thank you