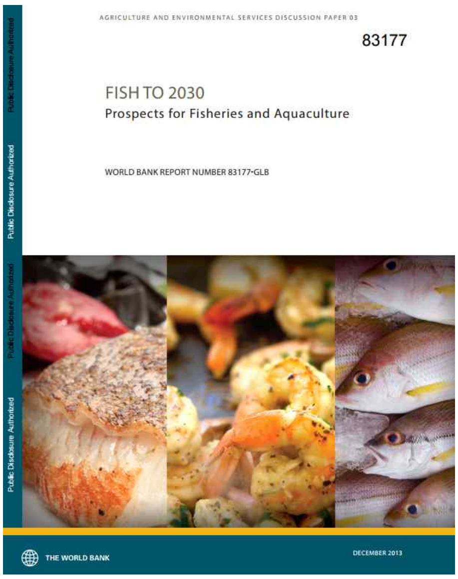
중국 넙치 소비동향

소비 개요

- 세계은행이 발표한 자료[1]에 의하면 중국의 수산물 수요는 매년 증가하여 2030년에는 세계 수산물 소비의 약 38%를 차지할 것이라고 예상하며, 실제 중국은 증가하는 수요를 대비하여 수산물 양식에 많은 투자를 하고 있음

– 2010년 중국인 1인당 수산물 연간 소비량은 33.1㎏으로 1990년 이후 매년 6%씩 증가하고 있으며 2020년에는 1인당 연간 35.9㎏을 소비할 것으로 예상

– 중국인들의 소비 증가는 중산층 및 젊은 소비자의 증가로 설명할 수 있으며, 이런 소비자들은 수입된 수산물에 대한 인식이 좋은 것으로 나타남




10 FEB 2014

New prospects for fisheries and aquaculture

According to the report Fish to 2030: Prospects for Fisheries and Aquaculture, resulted from a collaboration between the World Bank, Food and Agriculture Organization of the United Nations (FAO) and the International Food Policy Research Institute (IFPRI), aquaculture — or fish farming — will provide almost two thirds of global food fish consumption by 2030, as catches from wild capture fisheries level off and global demand substantially increases. The report highlights the extent of global trade in seafood which tends to flow heavily from developing to developed countries. While at present 38 percent of all fish produced in the world is exported and in terms of value, over two thirds of fishery exports by developing countries are directed to developed countries, the study finds that a major and growing market for fish is coming from China which is projected to account for 38 percent of global consumption of food fish by 2030. China and many other nations are increasing their investments in aquaculture to help meet this growing demand. The report predicts that 62 percent of food fish will come from aquaculture by 2030 with the fastest supply growth likely to come from tilapia, carp, and catfish. The World Bank's Director of Agriculture and Environmental Services, Juergen Voegele, said the report provides valuable information for developing countries interested in growing their economies through sustainable fish production, though he warns that carefully thought out policies are needed to ensure the resource is sustainably managed.

(FAO)

출처: World Bank Fish to 2030:Prospects for Fisheries and Aquaculture(2013)

- 소비트렌드[2]의 변화

– 잉어, 새우, 프론과 같이 민물에서 양식된 수산제품은 자가용 소비로 적당한 가격을 형성하고 있어 소비가 증가하는 추세

– 중국의 북부지역의 소비자들의 경우 조기, 투라치, 오징어 등 해수면 양식 제품을 선호

– 국산제품으로는 대구, 오징어, 가자미, 고등어와 같은 해수면 양식 제품을 선호

– 도시에 거주하는 소비자들은 가공된 조개, 새우제품이나 틸라피아 필렛 형태의 제품을 선호함

– 랍스터, 백합, 연어, 게와 같은 고가의 수입 제품은 호텔이나 고급레스토랑에서 사용되고 있음

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[1] World Bank Fish to 2030:Prospects for Fisheries and Aquaculture(2013)

[2] Food Export Association of the Midwest USA Asian Seafood Market Profile

Asian Seafood Market Profile

China Seafood

China is the world's largest producer, consumer, importer and exporter of fishery products – handling more than 35% of global production. Imports of seafood products to meet growing in-country consumption are projected to increase. Seafood consumption in China increased rapidly from 11.5kg per person in 1990 to 25.4kg in 2004, and is predicted to increase to 35.9kg/year in 2020. In 2005, China's middle class accounted for 90 million people; this is expected to increase to 650 million by 2015. China's growing population of young, sophisticated and affluent consumers (located primarily in the major cities) seek to purchase imported seafood products, in part for their status but also because imported seafood is believed to be of higher quality and coming from a cleaner environment. Growing opportunities exist for sales of a wide range of Northeast seafood products, such as: lobster; scallops; conch; surf clams; sea cucumber; and finfish species. According to the report, "The Dragon's Changing Appetite," produced by Rabobank, China has the potential to become a US$20 billion (EUR 15.5 billion) seafood import market by the end of the current decade, with rising incomes increasing domestic demand for seafood, particularly premium species.

According to Global Trade Atlas data, total fishery imports into China during 2012 were valued at more than US$5.5 billion. Russia was the leading supplier with a total market share of 24% (down 15% from 2011). Imports from the U.S. ranked second with a market share of 20% (down 1% from 2011). Norway (at 7% market share, down 3% from 2011), Canada (with 6% market share, up 12% over the prior year) and New Zealand (at 5% market share, up 45% over 2011) rounded out the top five suppliers of seafood to China. The bulk of fishery imports into China has traditionally been destined for processing and re-exports. Qingdao and Dalian continue to be the two largest arrival ports for aquatic products. Imports of seafood products for domestic consumption are gaining ground.

According to FAS/Guangzhou, domestic demand continues to strengthen. Live freshwater fish still dominates inland city markets, while frozen and processed products are more common in northern regions. Live seafood is popular among the wealthy residing in coastal cities. South China remains the dominant high value imported seafood product consumption center. With the highest incomes in China, passion for seafood dishes, and the presence of a large number of seafood importers, distributors and supporting logistic and storage infrastructure, South China is the prime destination for high value seafood. FAS/Guangzhou also reports that new products, such as lobster, crab, cod and roe, are becoming increasingly visible to consumers. Changing seafood varieties indicate the change in domestic choices for seafood consumption.

According to FAS trade data, total U.S. seafood exports in 2013 were 443,149 MT (down 3% from 2012) and valued at nearly US$1.2 billion (down 1%). Leading U.S. seafood products were: uncanned salmon (US$241.8 million, up 15%); cod (US$143.7 million, down 8%); sole (US$129 million, up 100%); pollock (US$33.5 million, up 32%); and squid (US$97.7 million, down 12%). Exports of Food Export-Northeast's seafood program benchmark products (lobster, scallops, squid, herring, mackerel, monkfish and dogfish) totaled US$184.5 million (up 17% and US$27.3 million over 2012). According to Global Trade Atlas data, total worldwide imports into China for same, or market-same, program benchmark products were US$520 million in 2012 and the U.S. ranked as top supplier.

Sales of American lobster to China, a signature seafood product of the northeastern U.S., again experienced tremendous growth in 2013. Sales of American lobster to China totaled $52.4 million (up more than $24 million and 85% in value, over 2012). China is the fastest growing foreign market for sales of U.S. lobster and, in 2013, sales jumped past traditional top markets in Europe to make China the top foreign consumption market for American lobster. All product forms experienced growth in 2013. Sales of live American lobster remained dominant (US$31 million in 2013), representing 59% of total sales. Both live and frozen processed American lobster products are widely available at retail and in the foodservice sector.

Rock lobster from Australia and New Zealand and Homarus americanus lobster from Canada are the major competitors for U.S. lobster sales. Lobster from the U.S. and Canada was commonly referred to as "Boston Lobster" within China until recently. In 2012, buyers also began referring to the product as "American" lobster due to U.S. industry presence at trade shows and as a result of trade seminars and promotions. Efforts to stress U.S-origin for Homarus americanus lobster have helped facilitate introduction of our lobster species into the market. As awareness for American lobster grows, educational activities to promote additional U.S. seafood products together with lobster can aid their market entry.

출처: Food Export Association of the Midwest USA Asian Seafood Market Profile

소비 형태

- 중국인의 넙치 소비는 회보다는 소스가 첨가된 찜, 구이(튀김) 형태가 일반적임

– 이는 회를 먹는 것이 불가능해서라기보다는 넙치를 회로 먹는 문화가 없기 때문인 것으로 나타남

– 일반적으로 터봇을 소비하기 때문에 한국산과 같은 넙치는 보편화되어 있지 않으며, 한국산은 식감이 연하여 중국 요리에는 적합하지 않음

넙치 소비 형태

찜(소스 첨가)	튀김	튀김(소스 첨가)
		

회 (중국산 터봇)*	회 (일본산)
	
(중국 해산물식당에서 주문 : 조사 이전 소비사례 없음)	(일식당에서 주문: 히라메로 표기하여 판매, 한인 위주 소비)