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Tilapia markets: Philippines, US, Puerto Rico and Israel

By **RY Buendia**

Tilapia, dubbed as the fish of the 21st century, is gaining popularity not only as a food for the masses but also as a high quality commodity. Its production has steadily increased over the years, thanks to the new aquaculture technologies developed for this fish. But how does tilapia fare in the market? Let us take a look at the Philippines, USA, Puerto Rico, and Israel.

Philippines

In the Philippines, tilapia harvests mainly come from freshwater ponds and cages. The rest are from brackishwater ponds and freshwater pens.

Tilapia production in 1997 (Bureau of Agricultural Statistics 1998)

	Quantity (kg)	Value (₱)
Brackishwater ponds	5,887	293,816
Freshwater ponds	39,010	1,921,722
Freshwater pens	4,272	173,190
Freshwater cages	42,617	1,936,769
	91,786	4,325,497

Market price of whole tilapia ranges from ₱42-63 per kg. Prices for live and fillet tilapia are not available.

Prices of tilapia in 1997 (Bureau of Agricultural Statistics 1998)

	Wholesale	Retail
Metro Manila	₱ 51.64	63.03
Philippines	41.37	58.61

Among the cultivated species, red tilapia hybrid has the potential of making an impact in both local and export markets. Currently, Metro Manila is the dominant outlet. Viewed favorably in terms of taste, meat quality and nutritive value, live red tilapia (400 g and bigger) sells at around ₱200 per kg in restaurants and hotels. Chilled ones which are generally smaller

are sold at ₱55-60 per kg in public markets.

More and more private aquaculture firms are venturing into its commercial production. But still, steady supply is often a problem in big business outlets. This has to be overcome as regular customers order red tilapia about once or twice a week.

Frozen and fillet tilapia has a good market in Singapore, Hong Kong, Japan and the US. However, export of red tilapia or any other tilapia probably does not exist. The reason is that the Philippines cannot compete with top exporters such as Taiwan, Thailand and Indonesia in terms of price. For the Philippines to be in the mainstream, ways to lower production cost should be established and monoculture of fast growing hybrids should be promoted.

USA

Farmed tilapia production in the US reached over 6,800 tons in 1995. More than half of this came from the western region and around 70-75% were produced in recirculating systems.

Live, domestically produced tilapia dominates the market. While processed fish accounted for only 25% of total sales in 1995, costs of frozen whole, fresh fillet and frozen fillet increased a little compared to previous years. Average price of tilapia is provided below. It should be noted that quality greatly affects price range.

Average price of tilapia in 1995 (\$ per kg) (American Tilapia Association 1995)

	Wholesale	Retail
Whole, live	3.52-5.28	6.57-10.97
Whole, fresh	2.64-3.96	4.37- 6.60
Whole, frozen	1.43-1.76	2.17- 5.47
Fillet, fresh	7.37-7.81	8.80-13.20
Fillet, frozen	5.50-6.60	8.80-11.00

The US imported more than 24,000 tons in 1995, ranking tilapia third, next to shrimp and Atlantic salmon. Taiwan, the top exporter overall, took hold of the whole frozen and frozen fillet markets. On the other hand, Costa Rica which ranked second was the major source of fresh fillet.

Countries which imported more than 20 tons to the US market in 1995:

Top exporters of tilapia to the US in 1995 (tons) (American Tilapia Association 1995)

	Whole frozen	Fillet fresh	Fillet frozen	Total*
Taiwan	11,940	0	804	15,548
Costa Rica	0	868	0	2,173
Thailand	39	0	423	1,231
Indonesia	0	0	545	1,048
Colombia	0	382	0	885
Ecuador	23	113	177	615

*in live weight equivalent

Increasing import of high quality processed tilapia especially from Thailand and Indonesia is currently threatening some US farmers. In addition, there is stiff market competition between tilapia fillets and other fillets which are generally priced lower.

American consumers are "hanging on" to the taste of tilapia. For demand to continue, efforts should be done to have steady supply and consistent pricing.

Puerto Rico

A few years back, the marketability of salt-water cultured Florida red tilapia (hybrid of *Oreochromis urolepis hornorum* x *O. mossambicus*) was tested in Puerto Rico. Survey results revealed that retail prices of dressed-out fish (gilled, gutted and scaled) and whole fish were US\$7.70 per kg and US\$6.60 per kg, respectively. Wholesale price of dressed-out fish ranged

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from US\$4.96 to US\$5.18 per kg. Buyers preferred 450-580 g dressed-out tilapia and paid US\$7-20 per serving in restaurants.

Evaluation of taste, freshness, texture, appearance, size and price by customers were between average and excellent. When compared to silk snapper, a popular marine foodfish, customers judged Florida red tilapia as a little better in all six attributes.

The fact that tilapia has an impressive rating would make it attractive to prospective buyers. Therefore, it was recommended that emphasis should be given to said attributes when marketing the fish. Also a market-oriented name which stresses the red coloration and saltwater method of farming the fish should be used in promotion to make the customers aware that they are not buying the wild-caught earthy flavored freshwater *O. mossambicus*. Like in the US, producers should meet the demand for quality, availability and price.

Israel

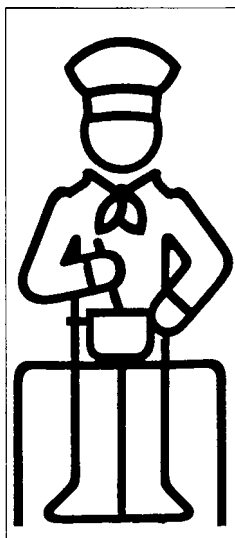
In 1996, farm production of tilapia (6,190 tons) was second only to carp (7,234 tons) in Israel. However, aquaculturists foresee that tilapia yield will surpass that of carp before the turn of century. Most tilapia are sold freshly iced. Only around 17% is marketed as processed. Prices depend on size and type of product, and average US\$3.50 per kg. Quantity of red tilapia marketed in 1996 was 5% higher than the previous year.

Average prices of tilapia in 1996 (Sarig 1997)

	Market share (%)	Price (US\$ per kg)
Chilled, large	57	4.18
Chilled, small	28	2.46
*Processed, large	5	2.05
*Processed, small	2	1.37
Red tilapia, large	6	4.19
Red tilapia, small	2	3.02

*Species other than red tilapia

With increasing fish production, competition may force tilapia prices to go down. To help growers, experts suggest that a more aggressive policy aimed at reaching all potential markets such as tapping areas located far from urban centers, direct sales along highways, and diversification of species and processed forms be adopted.



Cooking tips for tilapia

By **LH Plondaya**

The six recipes below were featured in the tilapia foodfest held by AQD in Bingawan, Iloilo on March 11. These were developed and tested by Boy de los Santos and Eduard Rodriguez, AQD staff and amateur gourmet cooks.

Tilapia Bicol Express

300 g tilapia
1/4 kg siling labuyo (long green, red pepper)
2 cups fresh coconut milk
bagoong alamang to taste
stir-fried gabi leaves

Fry whole tilapia and flake flesh when cooked. Set aside. Boil coconut milk, stir constantly. Allow to boil for 5 minutes and add gabi leaves, pepper, tilapia flakes, and bagoong alamang (to taste) until almost dry. Serves 6.

Ginataang Tilapia / Tilapia in Coconut Milk

300 g tilapia
2 cups fresh coconut milk
vinegar
1/4 kg siling labuyo (long green, red pepper)
chopped ginger, onion, garlic
dash of salt
atsuete (coloring)

Boil whole tilapia in coconut milk and vinegar, adding siling labuyo, onion, garlic, and atsuete. Add salt to taste. Cook until coconut milk is almost dry. Serves 6.

Bola-Bola Tilapia (Tilapia Balls)

10 pcs tilapia
1 egg
flour
onion, garlic
pickles
dash of salt

Boil tilapia and flake flesh when cooked. Set aside. Finely chop garlic, onion, and pickles. Mix thoroughly with flaked tilapia. Add salt

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