

The Saudi Aquaculture Industry





Industry Overview



In line with the plans for the Kingdom's further development towards 2030, there exists considerable potential for expanding aquaculture by exploiting the country's pristine coastline and marine environment.

The water temperature regimes for culturing a variety of fish and shrimp species, the low energy and labor costs and the access to strong national, regional and international markets provide a solid foundation upon which sector can be further develop to become a global leader in warm water aquaculture.





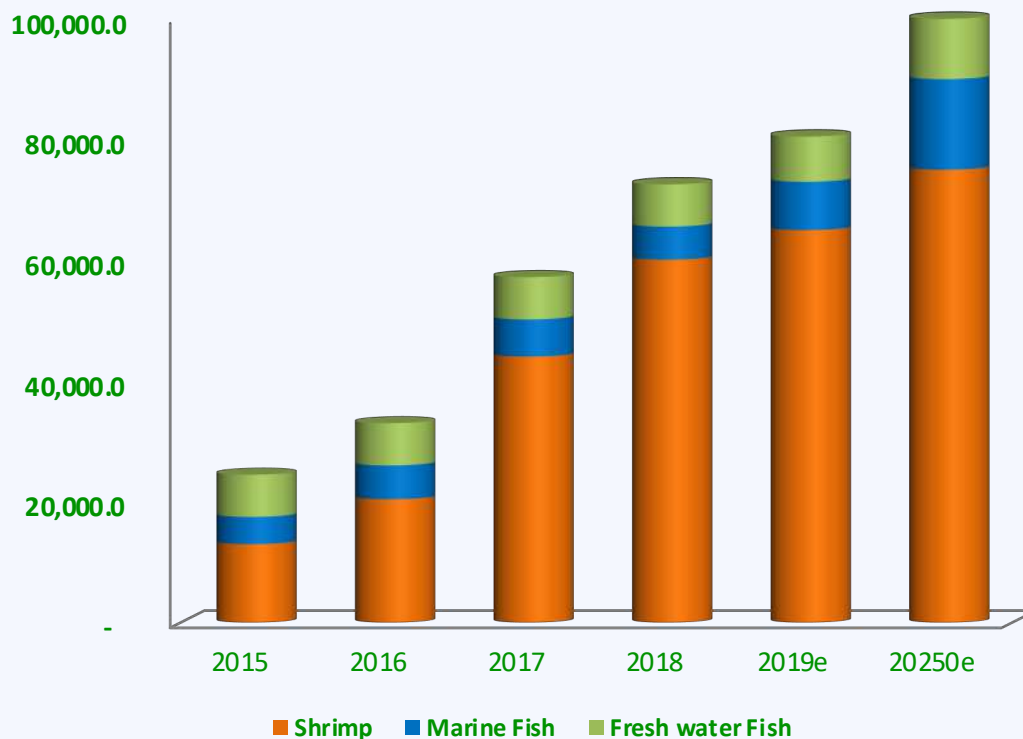
Industry Overview



Led by a number of pioneering Saudi companies, this potential has already started being exploited and the vision for the sector realized

From 2015 to 2018, total aquaculture production increased by 300%, from around 25 thousand tonnes to almost 75 thousand tonnes.

The target for 2020 is 100 thousand tonnes and almost 600 thousand tonnes by 2030.





Industry Objectives





Main Species cultured



Mediterranean Seabream
Sparus aurata



Red Sea White shrimp
Litopenaeus vannamei



Red Sea Seabass
Lates calcarifer



Meagre
Argyrosomus regius



European seabass
Dicentrarchus labrax



Tilapia
Oreochromis niloticus



Safety & Quality Drivers



Bio-security program

- Strong bio-security program based on international standards, with ISO certified diagnostic labs
- SOP manual shared with farms to ensure safety of operations
- Regular monitoring (monthly) to ensure SOP is being implemented



GAA / BAP certification

- BAP certification mandatory for all Aquaculture facilities by 2020
- KSA on track to be the first country in the world to have national level BAP certification
- This ensures consistent safety and quality of products and reduces disease risk for sector



SAMAQ labelling

- National Aquaculture product certification and labeling scheme, based on responsible Aquaculture practices
- SAMAQ certification to be used for the promotion of KSA's Aquaculture products to the local and regional markets



National Biosecurity Surveillance & Control



- ✓ KSA is operating a tight Aquaculture Biosecurity control program. Internationally this presents a case study as no other country is implementing such a robust, state-controlled program.
- ✓ The program is implemented by SAS (Saudi Aquaculture Society), under the supervision of the Aquaculture Department of MEWA.
- ✓ SAS employs 25 highly trained staff for this program, auditing and sampling operating aquaculture projects on a monthly basis.
- ✓ On average ~ 2,000 animals (fish & crustaceans specimens) are collected per month from the aquaculture projects, the adjacent environment, and the market for analysis





GAA/BAP Benchmarking & Certification



Best Aquaculture Practices (BAP) is an international, third-party certification system, developed by the Global Aquaculture Alliance (GAA), that verifies environmentally and socially responsible processes under which finfish, crustaceans and mussels are produced.

The BAP product logo is the fastest growing independent certification mark for Seafood consumer products



Number of BAP Certified Facilities

Includes Processing Plants, Farms, Hatcheries and Feed Mills (through August 2017)





SAMAQ National Aquaculture Quality Label



Description:	A national product certification and labeling scheme, based on international standards for responsible aquaculture practices , aiming at promoting KSA's aquaculture products to the local (and regional) markets.
Scope:	<p><u>Products:</u> Selected (certified) KSA aquaculture products (marine fish, shrimp, FW fish, caviar)</p> <p><u>Geogr. Coverage/ Market segments:</u> Nationwide - Generic (all potential KSA's customers and consumers)</p>
Objective:	<p>All national aquaculture products to be marketed with a specific label indicating their origin and assuring of their local production, freshness and product safety.</p> <p><i>(The label will be complementary to the GAA/ BAP certification)</i></p>



SAMAQ National Aquaculture Quality Label





The Main Saudi Aquaculture Companies



National Aquaculture Group (NAQUA)

Fish & Shrimp

- Capacity: ~100,000 tons
- Main products: Asian Seabass, P. Vannamei shrimp
- Certification: BAP

Approved by MEWA for China, EU, Australia, USA, Korea, etc.



Tabuk Fisheries

Fish

- Capacity: ~5,000 tons
- Main product: Mediterranean Seabream



From the Red Sea to the world

Thawrat Seas

Fish

- Capacity: ~5,000 tons
- Main products: Mediterranean Seabream



الشركة السعودية للأسماك
SAUDI FISHERIES COMPANY

Saudi Fisheries

Fish

- Capacity: ~5,000 tons
- Main products: Asian Seabass, Mediterranean Seabream and Sobaity



The Main Saudi Aquaculture Companies



الجمعية السعودية للاستزراع المائي
SAUDI AQUACULTURE SOCIETY



Jazadco

Shrimp

- Capacity: 2,500 tons
- Main product: P. Vannamei shrimp



Asmak

Fish

- Capacity: ~1,500 tons
- Main products: Mediterranean Seabream, Subaity and Asian Seabass



Red Sea Aquaculture

Shrimp

- Capacity: ~3,200 tons
- Main products: P. Vannamei shrimp



Island Prawn

Shrimp

- Capacity: ~2,000 tons
- Main products: P. Vannamei shrimp