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The market for mudcrab

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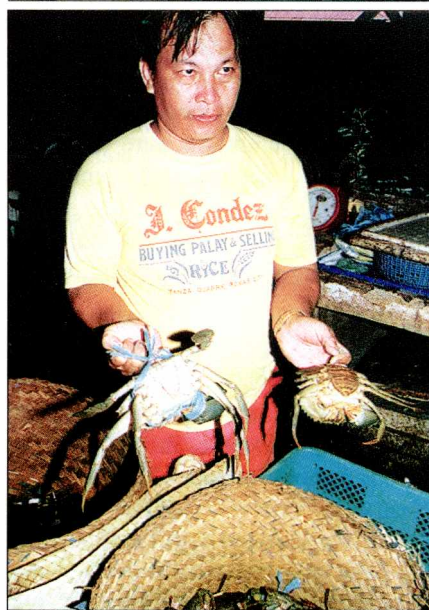
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The market for mudcrab

By **ET Aldon** and **NJ Dagoon**

PHOTOS R Buendia, I Tendencia



CAPIZ is the primary trading area in west central Philippines. Here, 250 g mudcrab females that are berried (or with eggs) sell for ₱170 per kg in retail; 500 g males for ₱90 a kg (July 1997 prices). The mudcrab are pond-reared; farmers usually harvest selectively.

The market opportunities for the mudcrab industry are promising, according to a report by Jim Breinl and Kerry Miles titled *The world market for mudcrab* (1994). Many countries in Asia, America and Europe have high crab consumptive growth rates, while total consumer countries (Malaysia, Hong Kong, Japan and Spain) rely heavily on imports. High prices are paid for mudcrab in these countries. A market also exists to supply crab seedlings to countries depleted of native mudcrab populations.

The major producing countries include Indonesia, India, Sri Lanka, Bangladesh, Thailand and the Philippines, says the report. Daisy Ladra and Jeff Lin's article, *Trade and marketing practices of mudcrab in the Philippines*, in *The mudcrab: a report of the seminar on mudcrab culture and trade* held in Thailand in November 1991

listed four marketable types: (1) mudcrab seed for stocking in fishponds; (2) "baby" crab of size 5-10 cm CW or carapace width and 10-40 g; (3) mature crab for fattening; and (4) exportable crab with CW exceeding 10 cm and weighing more than 200 g. Breinl and Miles noted that crab are either sold direct to exporters or wholesalers. Female crab are usually fattened until they become gravid to command a significantly higher price. Juvenile or small seed crab can be wild harvested and grown in ponds. Most of these juveniles range from 20 to 50 g.

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The crab market

Breinl and Miles indicated the level of crab consumption using this formula: **consumption = imports + (production - exports)**.

The top five biggest total consumers are China, USA, Japan, Korea, and Thailand.

The attractiveness of a market can also be indicated by growth rates in consumption. Mudcrab consumption growth rates of countries in Breinl and Miles' study ranged from negative growth to 24%.

Countries with high consumption growth rates are: Germany (24%), Malaysia (21%), Australia (15%), Hongkong (13%), and Spain (12%).

Market potential can also be measured by cross plotting consumption growth rates and total consumption. To indicate market attractiveness, high growth rates were deemed to be 4% and above and high total consumption was considered at a level of 5000 tons and above.

Countries which were found to have both high crab consumption growth rates and large total consumption, and relied most heavily on imports were Malaysia, Hong Kong, Japan and Spain. These markets remain attractive to potential exporters.

Breinl and Miles also noted the volume and value of mudcrab imports of major importing countries (Table 1).

Mudcrab prices

Philippines

Although there has been a substantial demand for mudcrab in export markets, the Philippines in 1991 exported only 329 tons in 1991, a shortfall from 477 tons in 1987. The

decrease has been attributed to pollution problems (Globefish 1995).

Strong demand has increased the prices in the domestic market. The prices paid for mudcrab by importers in Taiwan and Hongkong were A\$5.70 to A\$11.40 and A\$5.70, respectively (A\$1=US\$0.75). Mudcrab from the Philippines are exported to several countries in the Pacific Rim with most going to Taiwan and Hong Kong.

Indonesia

There has been increasing demand for mudcrab from Indonesia in export markets. Crab exports increased from 1,994 tons in 1981 to 3,494 tons in 1988. This growth is expected to continue due to high prices in international markets and has resulted in crab production growing 12.5%. Most of the Indonesia mudcrab are exported live to Singapore, Malaysia and Taiwan.

Malaysia

Most of the production of mudcrab is consumed locally except for large mature females which are sold in Hongkong and Taiwan. Production is about 600 tons yearly. Gravid females are sold for about A\$ 6.30 to A\$7.80.

Thailand

Mudcrab production has remained static, although total production has increased. Although aquaculture of mudcrab is not practiced and crab fattening is carried out in some parts of the country, the average value is approximately US\$2 per kg. Mudcrab from Thailand are exported live or frozen.

Japan

The average prices for fresh crab have remained fairly constant at 5,000 yen per kg or A\$70 per kg. The highest wholesale price for fresh crab in 1993 was 2,317 yen per kg or A\$33 per kg in February and the lowest was 1,812 yen per kg or A\$25 per kg. This makes Japan a potential exporter.

Australia

Abundant production of mudcrab is from February to June in Australia, totalling 363 and 338 tons in 1991

TABLE 1 Volume and value of mudcrab imports (Breinls and Miles, 1994)

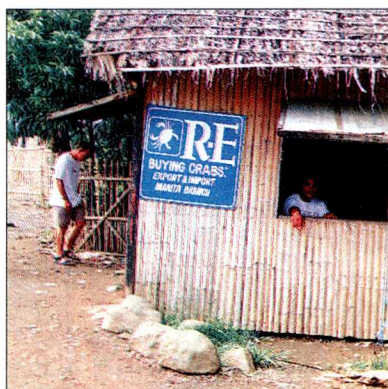
Importing country	Exporting country (tons mudcrab)			Total (tons)	Est. total market value (in AU\$)
	Indonesia	Thailand	Philippines		
Taiwan	375.8	90	188.8	654.6	6,546,000
Hong Kong	5.77	30	166.4	202.17	2,021,700
Korea	31.04	na	na	31.04	310,400
Malaysia	421.41	0.1	na	421.51	4,215,00
Singapore	1,868.73	0.3	na	1,869.03	8,690,300
USA	na	0.8	14	14.8	148,000
Japan	80.85	0.5	10.4	91.75	917,500
Australia	3.5	na	na	3.5	35,000
				3,288.4	32,885

AUS \$ = US \$ 0.75





and 1992, respectively. Mudcrab prices have been increasing as the demand becomes greater than the supply which commands A\$30 per kg. Most of the crabs are marketed live to Asian restaurants.



Mudcrab buying stations in Capiz

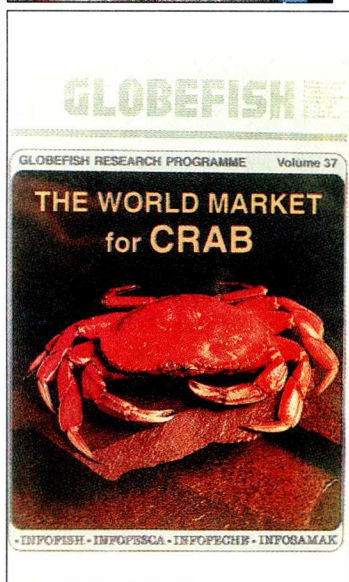


Further reading:

The Food and Agriculture Organization of the United Nations has published "The world market for crab," describing world crab catch, crab products, the international trade, prices, and market situation and outlook for the blue crab, tanner crab, king crab, and dungeness crab.

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Strengths, weaknesses, opportunities and threats to the Asian mudcrab industry

Strengths

- The ability to use abandoned tiger shrimp ponds for crab culture, thus reducing fixed costs.
- The ability to supply a prescribed product (size, sex and maturity) specifically catering to a consumer demand.
- The ability to add value to the female crabs in Asia.

Weaknesses

- Absence of technology
- High labor / production costs
- Lack of seed stock and commercial crab farms

Opportunities

- Many developing nations are experiencing a reduction of the wild mudcrab population. Consequently, an opportunity to supply mudcrab seedling exists.
- Many major mud crab suppliers have experienced environmental pollution which has adversely affected production. Countries with clean production image are at an advantage.
- Significant export markets could be developed if production is sufficient.
- Many countries have high consumption growth rates and consumption levels.
- There is the possibility of international investment into a well-researched and documented crab culture opportunity.

Threats

- Mudcrab from the Philippines are affected by algal blooms and industrial and urban run-offs.
- In India, the live export of mudcrab has been banned after November 1990 because crabs became an endangered species.
- Urban and industrial pollution and exploitation of juveniles threaten crab populations in Sri Lanka.