



وزارة البيئة والمياه والزراعة

Ministry of Environment Water & Agriculture



البرنامج الوطني لتطوير  
قطاع الثروة السمكية  
National Fisheries Development Program



# Aquaculture Saudi Arabia

رؤية  
VISION  
2030  
المملكة العربية السعودية  
KINGDOM OF SAUDI ARABIA

فيما يخصص الموارد الغذائية، سنواصل بناء مخزونات استراتيجية بمستويات آمنة وكافية لمعالجة الحالات الطارئة، كما سنبنّي شراكات زراعية استراتيجية مع الدول التي حباها الله موارد طبيعية من تربة خصبة ومياه وفيرة بما يحمي مواردنا المائية، وسنرشد استخدام المياه في المجال الزراعي بإعطاء الأولوية للمناطق الزراعية التي تمتلك مصادر مياه طبيعية ومتجددة، **وسنركز جهودنا في دعم الاستزراع السمكي**، كما سنعمل مع المستهلكين ومصنعي الأغذية والتجار لتقليل من كميات الهدر

هدفنا الأول أن تكون بلادنا نموذجاً ناجحاً ورائداً في العالم على كافة الأصعدة، وسأعمل معكم على تحقيق ذلك

تادم الحرمين الشريفين  
الملك سلمان بن عبد العزيز آل سعود

**AQUACULTURE** is a pillar for national growth & progress

رؤية  
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## PROTECTING OUR VITAL RESOURCES

We will continue to build safe and sufficient strategic food reserves, to better guard against emergencies.

Aquaculture will be promoted, as will strategic partnerships with countries blessed with natural resources such as fertile soil and water reserves.





## Aquaculture Sector Aspirations


  
 رؤية 2030  
 المملكة العربية السعودية  
 KINGDOM OF SAUDI ARABIA


  
 National Industrial Development & Logistics Program






  
 National Transformation Program


  
 VISION


  
**Global Competitiveness**

As part of a larger drive to **nurture and boost Saudi non-oil economic development** under Vision 2030, MEWA has set a strategic goal to **develop a globally competitive sector**

**AQUACULTURE SECTOR TARGETS**

	<b>Support Economic Growth</b>	<b>7x</b>	<b>Increase</b> in the sector's <b>contribution to GDP</b>
	<b>Enhance Food Security</b>	<b>530K tons</b>	<b>Fish and shrimp</b> produced through local farming
	<b>Increase Local Seafood Consumption</b>	<b>100%</b>	<b>Increase in seafood consumption per capita</b>
	<b>Reduce Local Production Costs</b>	<b>30%</b>	<b>Reduction in production costs</b> due to economies of scale and tech

Strategy &

## 02 >> THE ADVANTAGES OF SAUDI ARABIA FOR AQUACULTURE



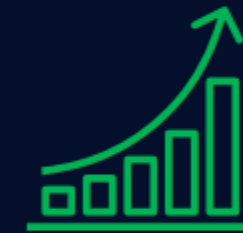
It provides 1,200 km of coastline on the Arabian Gulf and 2,600 km on the Red Sea.



Availability of good infrastructure.



The appropriate climate for the cultivation of various economic types of fish




Fastest growing food sector, with %6 annual growth over the past 5 years



The strategic geographical location of the Kingdom, close to the local, regional and international marketing centers

## 6 Strategic Objectives



**1**

**Increase total production output to achieve self sufficiency target**



**2**

**Support industry & enhance domestic competitiveness**



**3**

**Develop a thriving domestic seafood market**



**4**

**Invest in training to build capacity**



**5**

**Drive government led interventions**

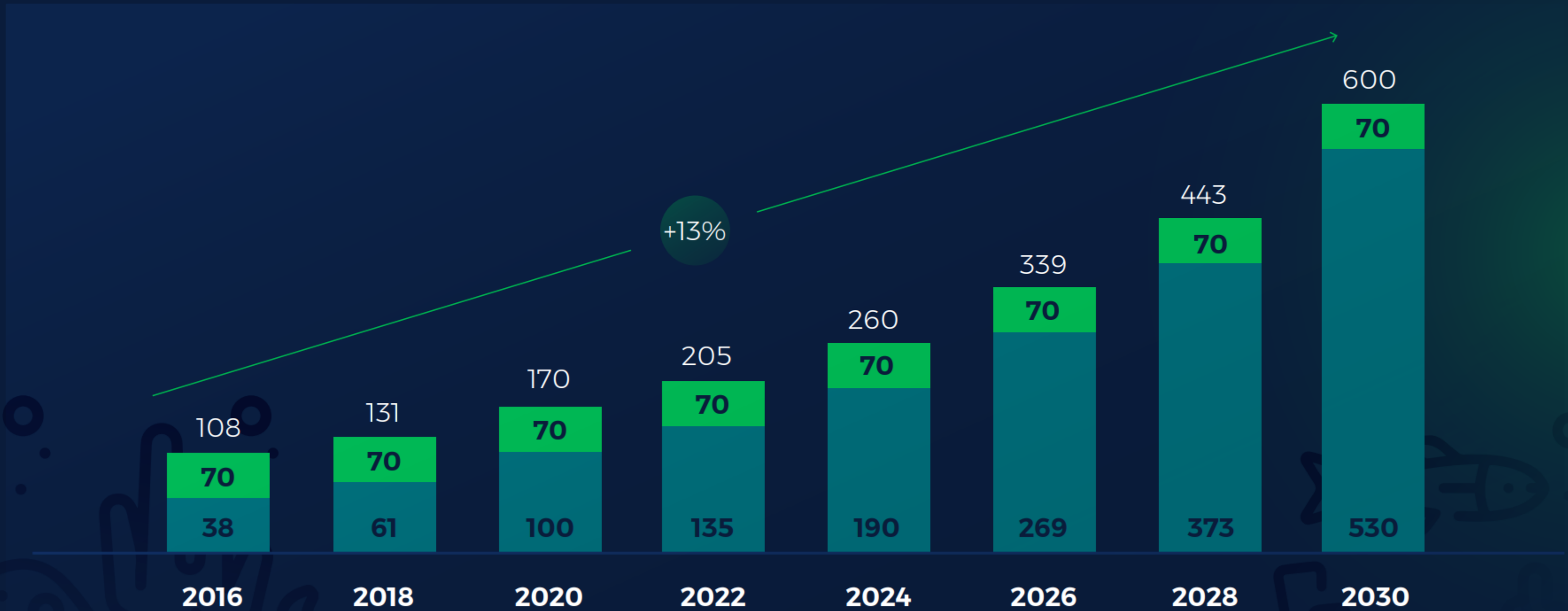


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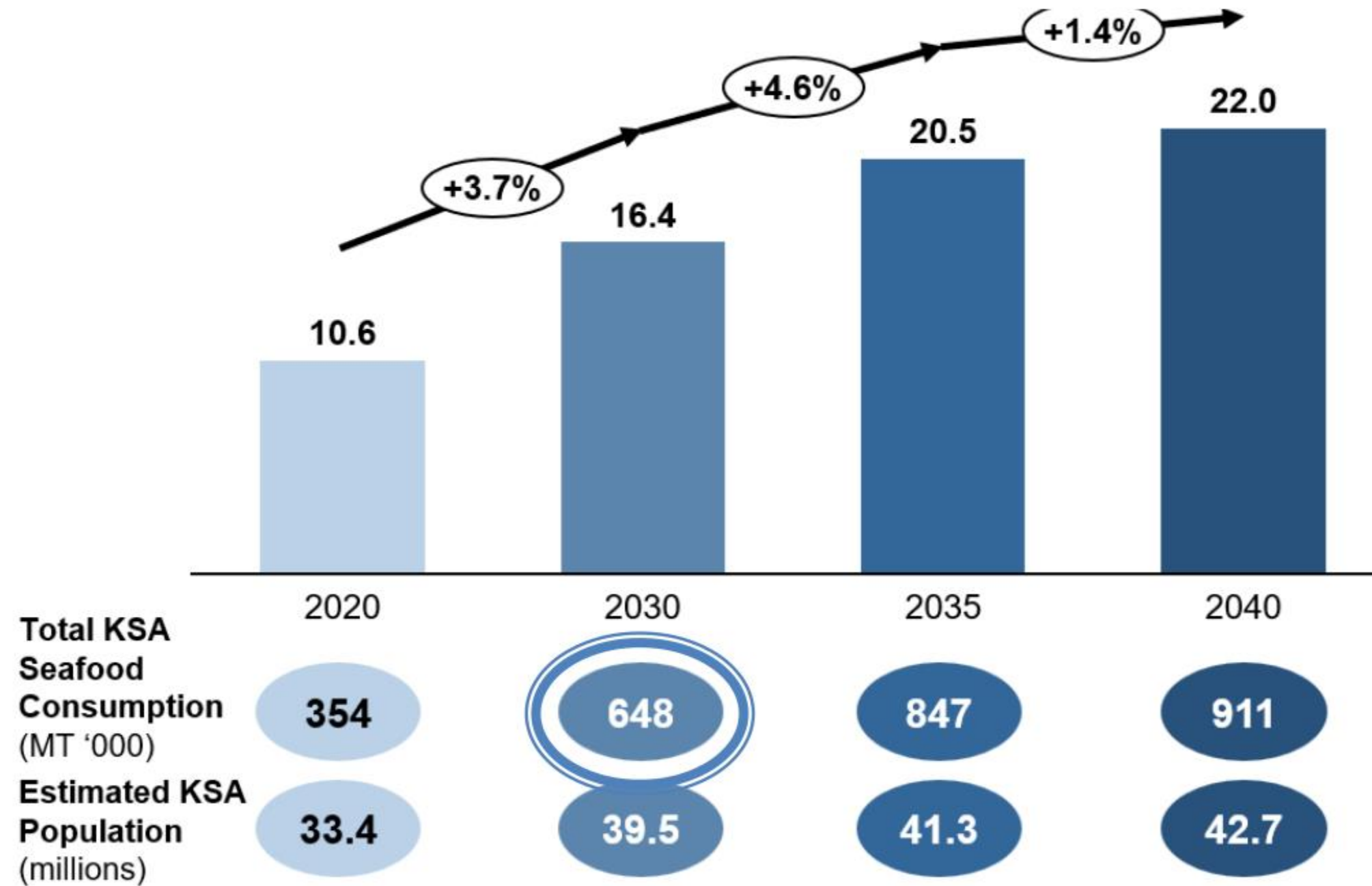
**Attract investors & foreign players**

# 01 >> Aquaculture Development Plan for the Kingdom of Saudi Arabia

Target production from Aquaculture is 530,000 tons in 2030



## KSA Seafood Consumption per Capita (2020-2040, Kg/Capita)



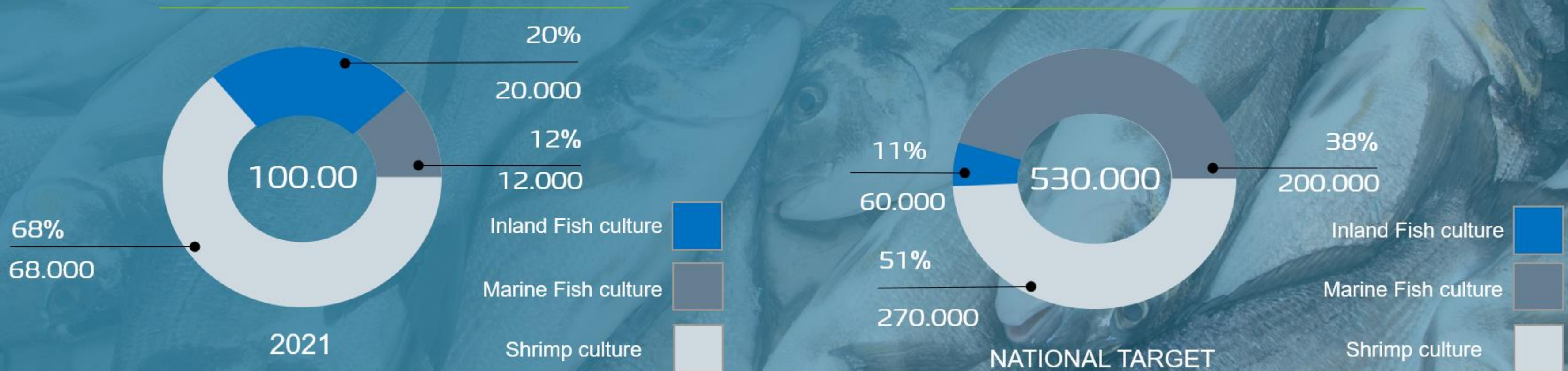
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# Aquaculture in Saudi Arabia

## Overview of the sector:

Gross Production (tons)



- Low numbers of established Marine Fish Farms
- Expected huge increase in development of Marine and RAS Fish Farms
- Prospective Development of Shellfish and Algal farms

# Aquaculture in Saudi Arabia

Species  
currently  
reared



White  
Shrimp  
*Litopenaeus  
vannamei*



Barramundi  
*Lates  
calcarifer*



Gilthead  
Seabream  
*Sparus  
aurata*



Sobaity  
*Sparidentex  
hasta*



Marine  
Tilapia  
*Oreochromis  
spilurus*

# Aquaculture in Saudi Arabia

Prospective  
species  
with farming  
technology  
developed  
through  
extensive  
R&D



Pompano  
*Trachinotus  
blochii*



Giant Trevally  
*Caranx ignobilis*



Mangrove  
snapper  
*Lutjanus  
argentimaculatus*



Cobia  
*Rachycentron  
canadum*



Grouper  
*Epinephelus  
coioides*

# Aquaculture in Saudi Arabia

## Aquaculture Companies

Tabbuk Fish	
Tharawat Seas company	
Mastura Company	
Rubian Jazira	
NAQUA	
Aquaculture Sharq Farms Company	
Saudi Fisheries Company	
RSACO	
Saudi coast	
Jazadco	
Faisal Al sheddi Company	



# The National Strategy for Sustainable Aquaculture Development

## RED SEA coastline

Low industrialization

Low urbanization

No waste water runoff

No river run off

No Red tides / No eutrofication

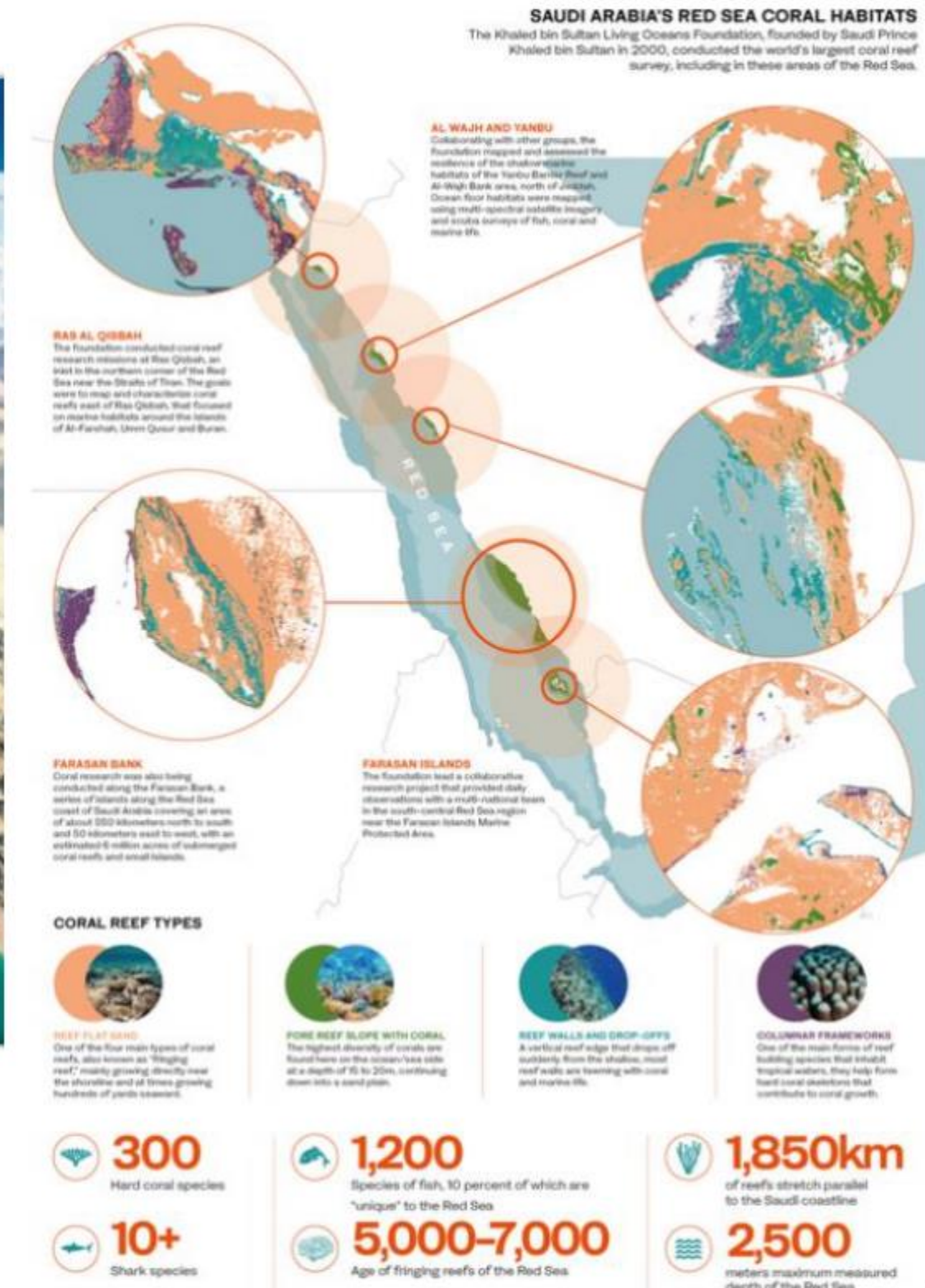
Suitable depths ( 30-80 m)

Low wave heights (0.5 to 1 m)

Pristine waters and good water circulation



## A GOLD MINE FOR AQUACULTURE



# Aquaculture in Saudi Arabia

## Value

The main importance of aquaculture:

- provide food for the growing number of population in Kingdom of Saudi Arabia and the wider region
- Contribute to seafood consumption increase from 10kg/person/year to 25Kg/person/year
- Reduce food trade deficit
- Provide sustainable employment all along the production and supply chain
- Contribute to national GDP

# Aquaculture development

## National Strategic Plan for aquaculture

- Development of the National Aquaculture Center
- Research & Development – Aquaculture Development Program 1 & 2
  - Species selection
  - Species-specific feed formulations
  - Hatchery protocols
  - Adapting modern technologies
  - Value Chain improvement
  - GIS and Carrying capacity
  - Site selection
  - Monitoring and mitigation

# Aquaculture development

Establishment of a high calibre Regional Aquaculture Center of Excellence for the Near East & North Africa countries bordering the Red Sea & the Arabian Gulf



Regional Center of  
Aquaculture Excellence



## Key Differentiators



• **Largest Center with the most comprehensive aquaculture R&D and aquatic animal health offering on the Red Sea and in the region**



• Extensive focus on **developing** and promoting **local and regional species**



• **Dedicated programs to develop local and regional capabilities** across all aquaculture activities



• **Environmentally sustainable** through renewable energy usage, extensive water treatment, and mangrove plantation



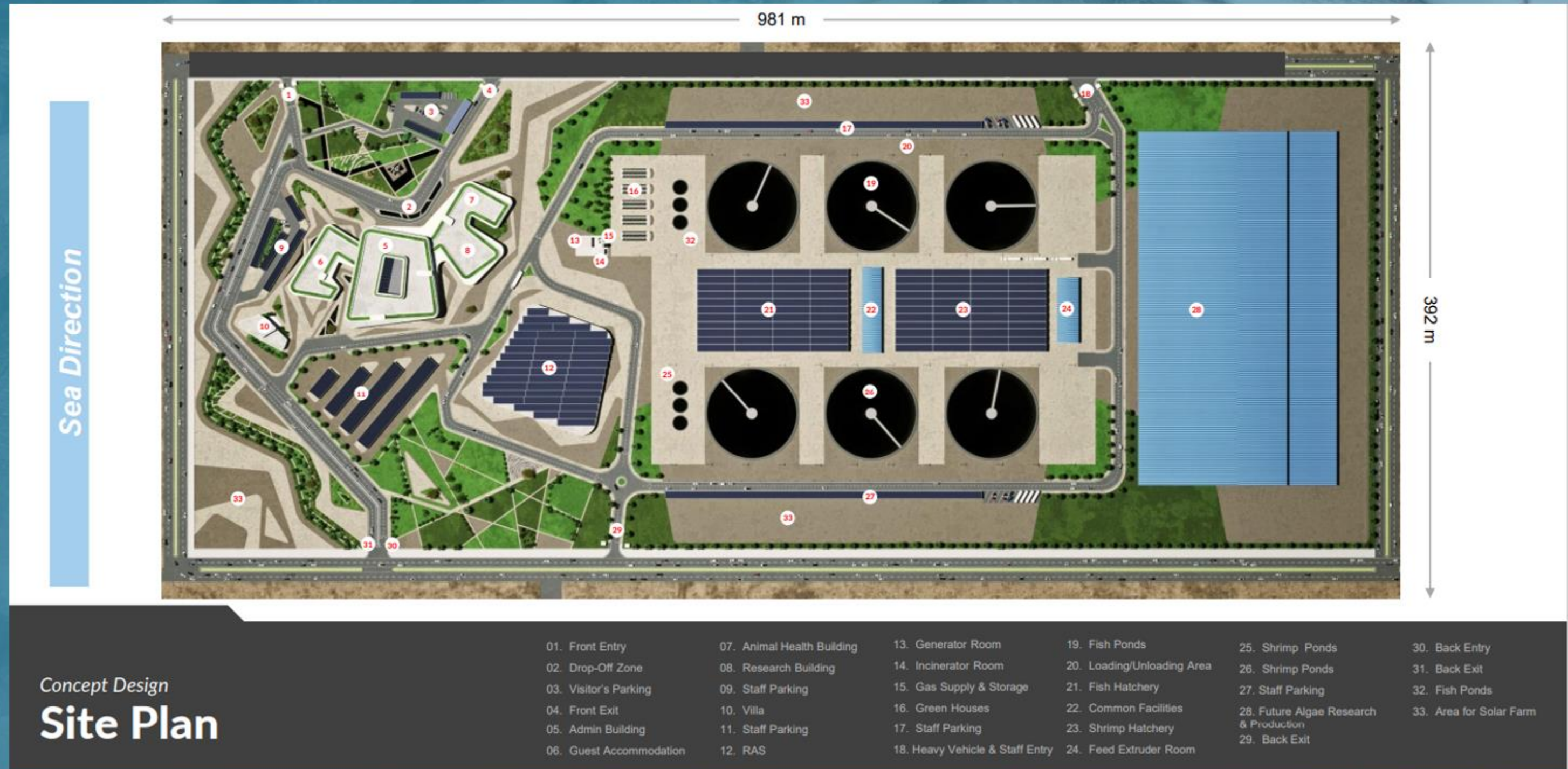
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# Aquaculture development

The Regional Aquaculture Center of Excellence:  
The concept Design



## Production

- Unexploited potential for:
  - 1) marine fish cage aquaculture
  - 2) Intensive shrimp farming
  - 3) RAS
  - 4) Aquaponics
  - 5) Complementary businesses
  - \* Aqua-feed mills including alternative proteins (insect / algae / bacteria)
  - \* Commercial hatcheries
  - \* Logistics & Distribution
  - \* Processing & product Value Adding

## Market

- Increasing population
- Young population (*new lifestyle, health conscious etc*)
- Lower than global average seafood consumption
- New consumption trends (*Horeca, / Online sales..*)
- Proximity to expanding international seafood markets (*EU, Russia, GCC, Asia etc*)

## Investment

- Business friendly procedures
- Government support
- Various incentive schemes
- Foundation work (*site selection/ allocation, market analyses*)
- Relatively lower energy cost
- Relatively lower cost of land
- Good logistic infrastructures (*national/ international ports/airports, road network* )

## 02 >> INTERNATIONAL CONNECTION



## 02 >> CURRENT STATUS OF THE INDUSTRY

### BIOSECURITY PROGRAM

01

Strong biosecurity program based on international standards, with ISO certified diagnostic labs

02

SOP manual shared with farms to ensure safety of operations



03

Regular monitoring (monthly) to ensure SOP is being implemented

## 02 >> CURRENT STATUS OF THE INDUSTRY

### GSA / BAP CERTIFICATION

01

BAP certification mandatory for all Aquaculture facilities by 2020



**Best  
Aquaculture  
Practices**

02

KSA on track to be the first country in the world to have national level BAP certification

03

This ensures consistent safety and quality of products and reduces disease risk for sector

## 02 >> CURRENT STATUS OF THE INDUSTRY

### SAMAQ LABELLING



01

National Aquaculture product certification and labeling scheme, based on responsible Aquaculture practices

02

SAMAQ certification to be used for the promotion of KSA's Aquaculture products to the local (and regional) markets

## 02 >> SAMAQ Certification: Principles, Guidelines & Criteria



# Aquaculture governance

- Planned regulatory and administrative framework for aquaculture development
- Aquaculture legal framework
- Main authority
- Main regulation



# THANK YOU

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شكراً..

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