SCIENTIFIC COMMITTEE
NINTH REGULAR SESSION

6-14 August 2013
Pohnpei, Federated States of Micronesia

ANNUAL REPORT TO THE COMMISSION
PART 1: INFORMATION ON FISHERIES, RESEARCH, AND STATISTICS

WCPFC-SC9-AR/CNM-38

THAILAND

ANNUAL REPORT TO
THE WESTERN AND CENTRAL PACIFIC FISHERIES COMMISSION

PART 1: INFORMATION ON FISHERIES, RESEARCH AND STATISTICS

THAILAND ANNUAL FISHERY REPORT
DEPARTMENT OF FISHERIES
MINISTRY OF AGRICULTURE AND COOPERATIVES

Scientific data was provided to the Commission in accordance with the decision relating to the provision of scientific data to the Commission by 8 July 2013	**No**
If no, please indicate the reason(s) and intended actions:	**There is some delays in internal process**

I. Introduction

Blessed with 1,785 km. shoreline on the Gulf of Thailand and 740 km. on the Andaman Sea, Thailand is endowed with rich fishery resources. Fisheries sector has contributed significantly to the country's economy. Apart from generating substantial incomes and employment, it also supported the various downstream industries, e.g. ship building and fish processing industries. Fishery products are a main source of animal protein in the diet, and are an important foreign currency earner. Fishery products are not only consumed domestically, but also exported. The value of fish exported has continued to grow.

Marine fisheries in Thailand have been rapidly developed. Thailand is ranked among the top-ten fishing nations in the world.

II. Annual Fisheries Information

A. Domestic Tuna Fisheries

Thai vessels are fishing for neritic tunas in the Gulf of Thailand and in the Andaman Sea. The main commercial species of small tunas caught are frigate tuna, kawakawa, and longtail tuna destined mainly for tuna canneries. The other species found with a small quantity in the Gulf of Thailand and in the Andaman Sea include dogtooth tuna, bullet tuna, and skipjack. Fishing gears employed are light luring purse seine, Thai purse seine, and king mackerel gill net.

Thailand contributes small amount of tuna production each year. Table 1 shows its tuna fisheries production compared to the world total tuna catch from 2006 to 2010. Catch of tunas decreased from 73,970 tons in 2006 to 28,912 tons in 2010.[1] The production in 2010 accounted for 0.75 % of the world tuna production.

Table 1 Tuna Fishery Production of Thailand during 2006-2010 (Ton)

	2006	2007	2008	2009	2010	% share of 2010
Thailand	73,970	57,741	32,474	35,174	28,912	0.75
World	3,977,357	4,009,166	3,929,770	4,064,115	3,880,085	100.00

Source: FAO

Apart from regular fishing for neritic tunas within its national jurisdiction, Thailand has developed a large-scale tuna fishing fleet and ventured out to fish in the distant areas since 2000. In fact, the area of fishing operation is generally in the Indian Ocean due to its proximity to Thailand.

Having a large scale tuna canning industry and situating in a strategic location, Thailand has a pivotal policy and aspiration to operate in tuna fishing in the Indian Ocean particularly in the high seas with a view to providing steady supply of raw materials to support the need and requirement of our rapid development in tuna canneries. If such aspiration becomes successful, Thailand will be able to reduce its dependency on importing of a large quantity of tunas around the world and is capable of providing raw material to its tuna canning industry.

---

[1] Tuna statistic in 2007 onwards shows only catches taken by the Thai fishing vessels in its Exclusive Economic Zone. The declining production does not what so ever represent the depletion of neritic tuna fish stocks.

With respect to tuna fisheries in the Indian Ocean, Thailand apparently has authorized 2 large-scale tuna longliners to operate in the IOTC Competent Area. Nevertheless, a fleet of 4 industrial purse seiners and 1 supply vessel were used to fish in this area before ceasing it operation in early 2010 and sold to the new vessel owners and no more longer operating in the Indian Ocean.

In addition to the above-mentioned tuna fishing vessels, 3 Thai research vessels have been used to conduct scientific researches in the Indian Ocean.

Currently, Thailand still lacks of capacity to venture to operate in the WCPO.

Annual Catch and Effort by Primary Species and Gear in the WCPFC

Thailand has no fishing vessels operating in the WCPFC Competent Area.

Fishing Patterns (Catch by time/area)

Thailand has no fishing vessels operating in the WCPFC Competent Area.

Estimated Total Catches of Non-Target, Associated and Dependent Species

Thailand has no fishing vessels operating in the WCPFC Competent Area.

B. Unloading of Tuna Catch to Thai Ports

Thailand is a destination for landing of tuna caught by foreign fishing vessesl. In 2012, 13,000 tons of tuna was landed at ports in Phuket and Songkla Provinces, 8.8% increased from 2011. Landing comprised yellowfin (74%), bigeye (9.9%) and others including swordfish and marlin (16.1%). This production was derived from longliner (81.8%), purse seiner (17.9%) and handliners (0.3%).

C. Tuna Processing Industry

Rapid fishery development has driven Thailand to become one of the leading countries in tuna industry in particular having tuna canneries and exporting of tuna products. Due to limited national tuna fishery production, Thailand has to rely on import of a large amount of tunas in order to meet the high demand of raw material in its tuna processing industry each year.

Four main tuna species has been used for tuna cannery which are skipjack, albacore, yellowfin and bigeye. Thailand regularly imports 800,000 – 900,000 tons of frozen tuna caught in the Pacific and Indian Ocean per year to supply for its tuna canning industry. Nevertheless, the import declined in recent year from 831,008 tons in 2010 to 787,089 tons in 2011 (Table 2). The main suppliers were Taiwan (20 %), U.S.A. (15 %), South Korea (11 %), Vanuatu (9 %), Japan and ASEAN (7 %). Around 80 % of the imported tuna products are skipjack, followed by yellowfin and albacore. Other tunas and bigeye account for about 1 %. In 2012, Thailand imported 728,367 tons of tuna with the value of 51,623 million baht, 7.5% decreased from 2011. The main suppliers still were Taiwan (21.5%), U.S.A (12.3%), South Korea (11.4%) and Vanuatu (9.7%).

The price of imported tunas has been increased over the years and continues to grow significantly. The Bangkok CIF of frozen skipjack increased from 1,303 U.S. dollars in 2007 to 1,772 U.S. dollars in 2011 or 26 % increase in the average price. The average price of imported tunas in 2012 was 2,138 USD per ton, 20.7% increased from 2011. The highest price recorded in October 2012 was 2,400 USD per ton. INFOFISH concluded that strong demand from packers coupled with

tight supply due to poor catches in the Western and Central Pacific Ocean were the main reasons for the skyrocketing price with no sign of softening. In Ecuador skipjack was quoted at around 2,300 USD per ton, usually lower than Bangkok price.

Twenty-four canneries are producing canned tunas and other products for export. Each year, Thailand can generate 800,000 tons of canned tunas. The tuna industry generally supports 40,000 workers and the canneries are located mainly in Samutprakarn, Samutsakorn, Songkla and Surat Thani Province.

Table 2 Import of Tuna Production of Thailand from 2008 to 2011 (Ton)

	2008	2009	2010	2011	% share of 2011
skipjack	608,986	668,948	650,448	632,044	80
Yellowfin	135,282	97,679	111,294	93,906	12
Albacore	32,792	39,918	48,892	42,906	5
Bigeye	8,047	12,761	14,526	7,583	1
Bluefin	53	1	9	18	0
Southern Bluefin	31	0	0	0	0
Other	24,326	10,315	5,838	10,633	1
Total	809,517	829,621	831,008	787,089	100

Source: Adapted from the Customs Department

Markets for tuna products from Thailand mainly canned tunas spread in every region around the world. The U.S.A. is the main market which accounts for 23 % of the total value of 9,363 million baht, followed by the EU (17 %), Africa (10 %), Japan (8 %) and Australia (7 %).

Table 3 demonstrates the producing cost of canned tuna in which 55-57 % is originated from imported raw materials. Therefore, price volatility of tuna fish production in the market will eventually have a strong effect to the producing cost of the Thai tuna canneries.

Table 3 Component of Cost to Produce Canned Tuna (In Brine or Oil)

Cost	% Share of the Total Cost
Raw Material	55-57
Packaging	6
Labor	18-20
Infrastructure (Water & Electricity) Transportation and Others	18-21

Source: Food Institute

C. Cooperation between Thailand and the WCPFC

Currently, Thailand is a Cooperating Non-Member (CNM) to the Western and Central Pacific Fisheries Commission (WCPFC). It has participated in the WCPFC through the principle specified in the Conservation and Management Measure (CMM) 2009-11 that it has an interest in the fishery in the Competent Area. It requested the Commission for the status of CNM and was accorded for 2011. Stipulated in the CMM 2009-11, the renewal of this status must be requested every year, and the Eighth and Ninth Regular Sessions agreed to grant a renewal of the CNM status for Thailand for 2012 and 2013 respectively. In addition, the participatory rights of Thailand in the WCPO are limited to the provision of carrier and bunker vessels. Nevertheless, Thailand has not exercised its participatory right by operating of any carrier and bunker vessels in the WCPO in the year 2012.

Thailand already submitted a request for renewal of its CNM status for the year 2014.

As a CNM, Thailand has continued its cooperative role in acquisition and exchange of fishery information and data from canneries located in Thailand with a view to facilitating the work of the Scientific Committee. Furthermore, it takes pride in cooperating with the WCPFC and pledges its commitment to make financial contribution as agreed upon by the WCPFC in the regular meeting. It commits to comply with conservation and management measures adopted by the WCPFC. Although, Thailand has no fishing vessels operating in the Competent Area, it accepts high seas boarding and inspection procedures.

D. National Research Programs

The following research programs are carried out by the Department of Fisheries of Thailand:

a. The Sampling Program on Tuna Longline Vessels Unloading in Phuket

The program has been carried out and provides a lot of useful information regarding foreign tuna longliners fishing in Indian Ocean and landing their catches at the Phuket fishing port, Thailand.

The purpose of this program is as follows:

- Enhance data collection and processing system for tuna fisheries in Thailand

- Improve and update data collection on tuna longline fisheries in the East Indian Ocean as well as information on the activities, nominal catches, catch breakdown by species and size composition for each species caught by tuna longliners unloaded in Phuket.

The activities involve collecting the number of landings, catch, vessel operating (no. of trip), weight samples, interviewing, biological samples and other activities such as collection of information of shark, other species, and study age of the fish by using otolith.

b. The Neritic Tuna Fisheries in Thailand

The department of Fisheries has engaged in data collection and processing system for neritic tuna fisheries in Thailand. The purpose of the program is to assess the precision of the current catch estimates by review and analysis of the existing data and comparing with catch estimates derived from alternate sampling activities. The landing surveys are conducted to collect fishing and biological data of neritic tuna, pelagic fish, and by-catch species. The activities at the landing places include collecting catch, effort (no. of trip), sizes by individual total length for pelagic

fish and fork length for neritic tuna and tuna-like species and weight. For 2012-2013, the Department of Fisheries has carried out collection of data on tongol fisheries and the stock analysis will be undertaken.

c. Tuna Resources Survey in the Eastern Indian Ocean

Thailand has conducted tuna resources survey in the Indian Ocean since 1988 (M.V. MAHIDOL has started since 1995). The purpose of the research program is to collect the relevant information of tuna distribution in the Indian Ocean in particular the Eastern Indian Ocean. The information derived from the research survey includes catch composition, catch rate, size of caught tunas, fork length frequency, and length-weight relationship. In addition, the information on water current, wave and wind condition, and other oceanographic observation has been collected.