THAILAND

Country level

With around 2% share in GDP, approximately €28 billion, while primary fishery exports from Thailand shared about the same percentage in export earning, being about €5 billion mainly shrimp from coastal aquaculture. Secondary fishery exports, mainly canned tuna and canned shrimp accounted for 3% being nearly €8 billion. Fish imports were around €0.5 billion annually, most of which were raw materials for fish processing including tuna loin for canned tuna. Fish consumption in Thailand accounted for 10% of total food consumption, at an average per capita consumption of over 20 kg/year. In term of production Thailand ranked as the ninth sharing 3% of the world production. In term of export volume Thailand ranked as the sixth sharing about 4% in international market, but in term of value the rank was 23rd sharing only 1% due to low export prices.

In 2004 the total production volume was 4 thousand tons of which 64% were from marine capture followed by 18% coastal aquaculture, 13% inland aquaculture, and the rest 5% from inland capture. In term of value marine capture shared 45%, followed by 36% coastal aquaculture, 14% inland aquaculture, and 5% inland capture.

Fishing "Metier" level

In 2004 total number of registered vessels was 16,432. By métier level, Thai fishing vessels can be grouped into six main mètiers, i.e. otter board trawlers (30%), pair trawlers (9%), beam trawlers (1%), push netters (3%), purseiners (11%) and other miscellaneous gears (47% including gill netters, trammel netters, falling netters, lift netters, long liners, and others). Main catches from trawlers and push netters were demersal aquatic livings including trash fish, not suitable for human consumption and was mainly for fish meal. Push netters were restricted fishing gears sharing only 3% of the total registered vessels.

Landing sites and Fishing grounds

There are two main fishing grounds in Thai waters: the Gulf of Thailand and the Andaman Sea. Nearly 60% of the total catches were reported as catches from the Gulf of Thailand while the rest were from Andaman Sea. From the Gulf of Thailand 38% were pelagic fish, 28% trash fish, 17% demersal fish, 7% other food fish, 7% squid and cuttlefish, 3% shrimp, 2% crabs and nearly 2% other shellfish. From the 38% pelagic fish, 19% was anchovy mainly from anchovy purseiners and anchovy netters. By métier, trawl catches were 58% of the total catches in the Gulf of Thailand of which 45% were from otter board trawlers while purseine catches were 33% of which 7% were from anchovy purseiners.

Selected fishing ground for Thai fisheries was the Gulf of Thailand.
Relevance of case studies

Selected case studies in Thai fisheries in the Gulf of Thailand are as followed.

**Case Study 1**: The selected fleet is trawlers, selected gear is otter board trawler, and selected species was trash fish. Ecologically, trash fish catch was around one-fourth of the catches from the Gulf of Thailand while part of the catch was juvenile economic species due to the fine mesh size thus degrading fishery resource abundance in the Gulf of Thailand. Economically, otter board trawl catches were 45% of the Gulf of Thailand catches. Trawlers were about 30% of the total fishing vessels in this fishing ground and the otter board trawls were 20% from this 30%. Sociologically, larger trawlers earned high fishing income from past fishing when resources had been abundant. Under degraded fishery resources they have alternatives other than fishing income while small scale fishermen in a lack of non-fishing source of income suffer from degraded fishery resource abundance.

**Case Study 2**: The selected fleet is purseiners, selected gear is anchovy purseiner, and selected species is anchovy. Ecologically anchovy was about 7% of Gulf of Thailand catches, 17% of the pelagic catches from the Gulf of Thailand. This fishing gear uses fine mesh size catching also juvenile economic species. Economically, anchovy purseiners were 9% of the total fishing vessels in the Gulf of Thailand. More than half of the catches are exported. Anchovy fishery had a conflict in coastal fishery resource utilization. Sociologically, anchovy fishery has a negative impact on small scale coastal fisheries competing in fishery resource utilization.