THAI FISHERY RESOURCES

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THE ISSUES

- Fisheries and the economic sector
- Sustainability of Thai fishery resources
- Relevant government policies
- The problems
- Recommendations
Fisheries in the economic sector

- 2% share in GDP and decreasing
- 10% share in total food consumption, and increasing

Figure 1 Share of marine fisheries 2002

(1.1) Total catches 3.3 mill. ton
(1.2) Total catch values 115 mill. THB
Fishery exports

- **Primary products**
  - 2% of total export values
  - Decreasing trend
  - Half of the values were from shrimp

- **Canned seafood and other processed seafood**
  - 3% of total export values
  - Decreasing trend
  - Canned shrimp, canned tuna
Thai fishery export in the world trade

- Production.....Rank 10\textsuperscript{th}, Share 3%
- Export..... Quantity – Rank 6\textsuperscript{th}, Share 6%
  Value – Rank 26\textsuperscript{th}, Share 1%
- Import..... Quantity – Rank 30\textsuperscript{th}, Share 0.4%
  Value – Rank 32\textsuperscript{nd}, Share 0.2%
- Processing.....Rank 9\textsuperscript{th}, Share 3.5%
Trend of fishery production

Quantity (th. ton)  Value (mill. THB)
Sustainability (1)

- 1925...Introduction of Chinese purse seine
- 1930...Develop purse seine, using Japanese engine, fishing pelagic species mainly Indo-Pacific mackerel
- 1959...Introduction of otter board trawl
- 1961...CPUE was 298 kg/hr.
- 1963...Rapid increase in trawlers and push netters
Sustainability (2)

- 1968...fishing vessels of 24 m long and over fished outside Thai waters, small vessels turned to squid fisheries.

- 1972...Thailand was ranked as the top ten fishing countries for the first time, overfishing trawl fisheries, CPUE decreased to 63 kg/hr.

- 1973...Development of light luring and fish attractive device purse seines.

- 1977...Catches reached more than 2 mill. ton, then decreased due to overfishing in main economic pelagic species.
Sustainability (3)

- 1979-1981...EEZ
- 1982...Catches increased but fluctuating
- 1983...Catches increased to 2 mill. ton
- 1989...CPUE decreased to 20 kg/hr.
- 1996...Increasing fishing outside Thai waters
- 2005...CPUE decreased to 12 kg/hr.
Government policy (1)

- 1962-1966: Increase production at 7.5% annually
- 1967-1971: Fish for export, increasing production at 16.6% annually
- 1972-1976: Increasing yield at 11.3% a year, development of shrimp culture and deep sea fisheries
- 1977-1981: Over fishing, shrimp culture, fishing outside Thai water
- 1982-1986: Joint venture fishing, shrimp culture, mangrove rehabilitation
**Government (2)**

- **1992-1996:** Conservation measures, reducing loss, integrated fishery processing
- **1997-2001:** Increasing export capacity, Thai Sea rehabilitation, trade and environment
- **2002-2006:** Thai Sea rehabilitation, community participation

**Target**

- Thai fishing ground at least 1.7 mill. ton
- Outside Thai water at least 1.2 mill. ton
- Aquaculture, increase at 5% annually
- Export industry at least 1 mill. ton at 75 bill. THB, increase 10% annually
- Domestic consumption at least 30 kg/head/yr.
Government in fishery management

- Control on number of vessels/gears/fishing grounds/ fishing season
- Granting fishing and aquaculture right to local fishermen
- Increasing capacity among relevant agencies
- Environmental concerns
- Evaluation on fishery resource condition
- Fishery resource rehabilitation
- Increasing vessel and labor efficiency, development in fishery business as well as information and public relation
Problems

- Fishery resource degradation
- Number of fishing vessels
- Illegal and destructive fishing
- Commercial VS coastal fisheries
- Fishing cost
- Fish workers
## Number of trawler/push netter

<table>
<thead>
<tr>
<th>Year</th>
<th>Registered trawlers</th>
<th>Census: Number of trawlers</th>
<th>Census: Number of registered push netters</th>
</tr>
</thead>
<tbody>
<tr>
<td>1982</td>
<td>10,047</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1984</td>
<td>9,101</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1986</td>
<td>Increased &gt;800</td>
<td>7,234</td>
<td>1,458</td>
</tr>
<tr>
<td>1989</td>
<td></td>
<td></td>
<td>1,907</td>
</tr>
<tr>
<td>1992</td>
<td>9,465</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1993</td>
<td>9,086</td>
<td></td>
<td>808</td>
</tr>
<tr>
<td>1995</td>
<td>6,198</td>
<td></td>
<td>1,142</td>
</tr>
<tr>
<td>1999</td>
<td>5,163</td>
<td></td>
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</tr>
</tbody>
</table>
Number of vessels as reported by the census

<table>
<thead>
<tr>
<th>Year</th>
<th>Total vessels</th>
<th>Inboard engine</th>
<th>Outboard engine</th>
</tr>
</thead>
<tbody>
<tr>
<td>1985</td>
<td>53,457</td>
<td>16,982</td>
<td>36,475</td>
</tr>
<tr>
<td>1995</td>
<td>54,538</td>
<td>15,282</td>
<td>39,256</td>
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<tr>
<td>2000</td>
<td>58,119</td>
<td>13,263</td>
<td>44,856</td>
</tr>
</tbody>
</table>
Recommendation (1)

- Small scale fisheries
  - CBFM
  - Co-management
  - Community organization capacity
  - Fishing right: fishing ground, community (organization and members), fishing right, establishing community organization and management capacity, collaboration with relevant agencies
Recommendation (2)

- Commercial fisheries
  - Reducing number of vessels
    - Register
    - voluntary
    - Incentive
    - buy back
  - Register outside Thai water vessels
  - Information for determination on optimum level of fishing
  - Collaboration from the fishermen
THANK YOU