

Thai Fishmeal 2015



The Thai Fishmeal Producers Association

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❖ Established in 1981

A history of 34 years by now

Mission

- Provide our members with the collection and publication services of fishmeal data.
- Evaluate for our members any questions related to the public and the government they encounter, and provide assistance for their public relations .
- Provide education and help improve the productivity and quality of fishmeal to the international standard.
- Coordinate with the government to formulate policies and find solutions for the import and export of fishmeal.
- Arrange management meetings and trade negotiations

Current Situation of Thai Fishmeal Industry

- From small-scale to large-scale
 - Up to 2014 from 34 years ago, the number of our fish catches and fish plants have greatly increased.
 - Currently we have 90 steam drying fishmeal factories, reaching an annual fishmeal production capacity of 500,000 tons.



Among them, 73 factories are members of The Thai Fishmeal Producers Association

1. Samut Sakhon 24 factories = 130,000 tons/year
2. Samut Prakan 3 factories = 20,000 tons/year
3. Rayong 2 factories = 20,000 tons/year
4. Trat 3 factories = 10,000 tons/year
5. Chonburi 1 factory = 15,000 tons/year
6. Chumphon 6 factories = 20,000 tons/year
7. Ranong 8 factories = 35,000 tons/year
8. Phang Nga 2 factories = 10,000 tons/year
9. Phuket Island 3 factories = 30,000 tons/year
10. Trang 4 factories = 30,000 tons/year
11. Nakhon Si Thammarat 3 factories = 50,000 tons/year
12. Songkhla 9 factories = 50,000 tons/year
13. Pattani 5 factories = 30,000 tons/year



Types of Fishing Gears

- Purse seine
- Seine net
- Trawl net



Closed Fishing Season

1. During the three months from February 15th to May 15, fishing is prohibited in Thailand gulf area; and the no-take zone starts from Prachuap Khiri Khan, Chumphon to Suratthani.
2. The two-month closed fishing season for Andaman coast is from April 15 to June 15; and the no-take area covers Phang Nga Bay, Phuket Island, Krabi and Trang.
3. Along the Burma Coast, Miek will be closed for two months, that is, from May 1 to June 30.
4. The gulf coast of Thailand (inverted u-shaped) shall be closed, and the no-take area includes Samut Sakhon, Samut Songkhram, Samut Prakan, Chachoengsao, Chonburi, Phetcha Buri and Prachuap Khiri Khan. The closing time is from June 1 to July 31, according to the latest announcement from Thai government last year..



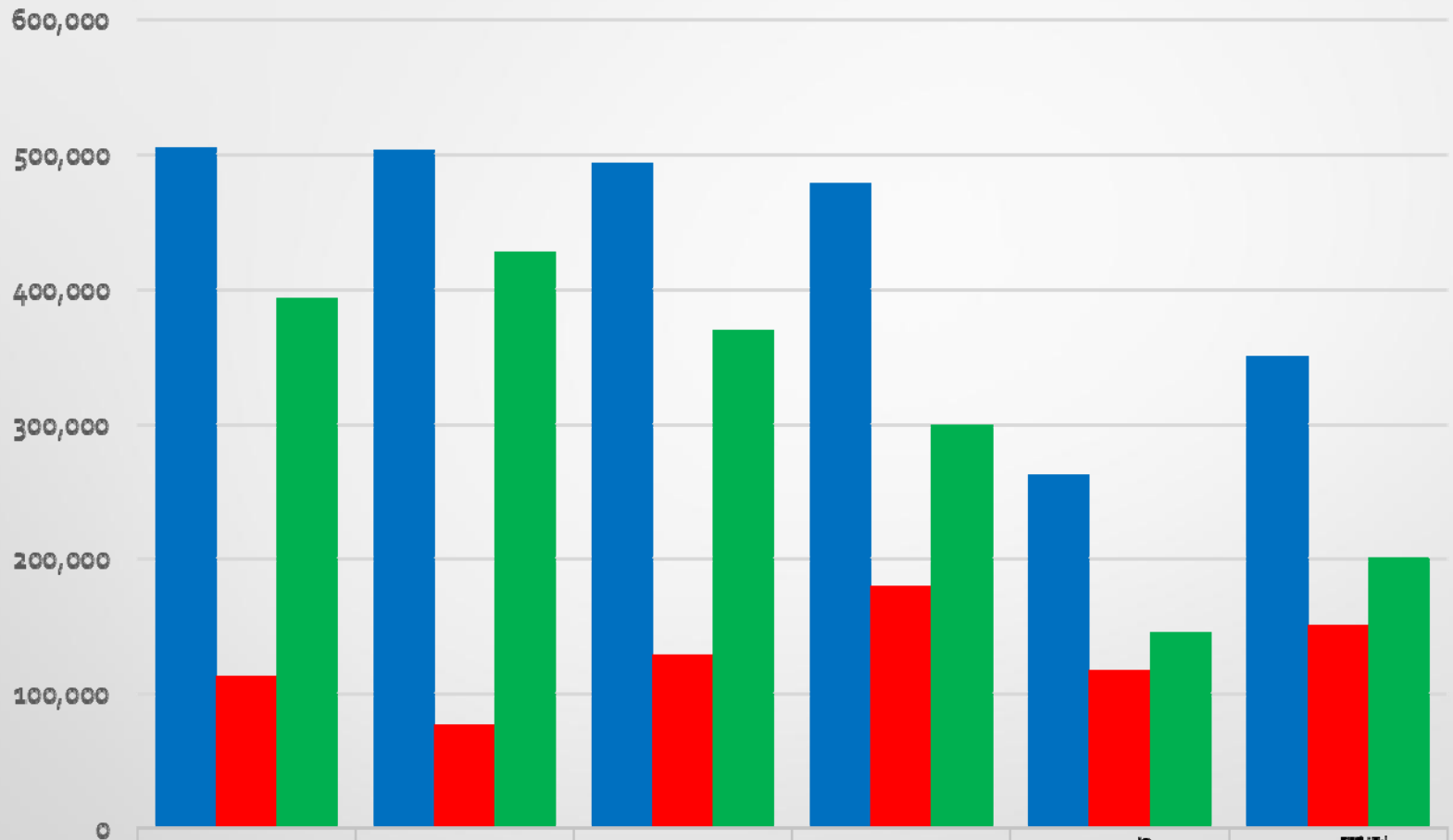
Seasonal Fishmeal of Thailand

	Monsoon Season	Closed Fishing Season	Seasonal Period
East	Jun. → Sep.	Apr. → Jun.	Oct. → May
Upper South	Oct. → Jan.	Feb. → May	May → Sep.
Lower South	Nov. → Feb.		Jun. → Oct.
Andaman	Jul. → Dec.	Apr. → Jun.	Nov. → Mar.



Thailand FM Production 2011-2015

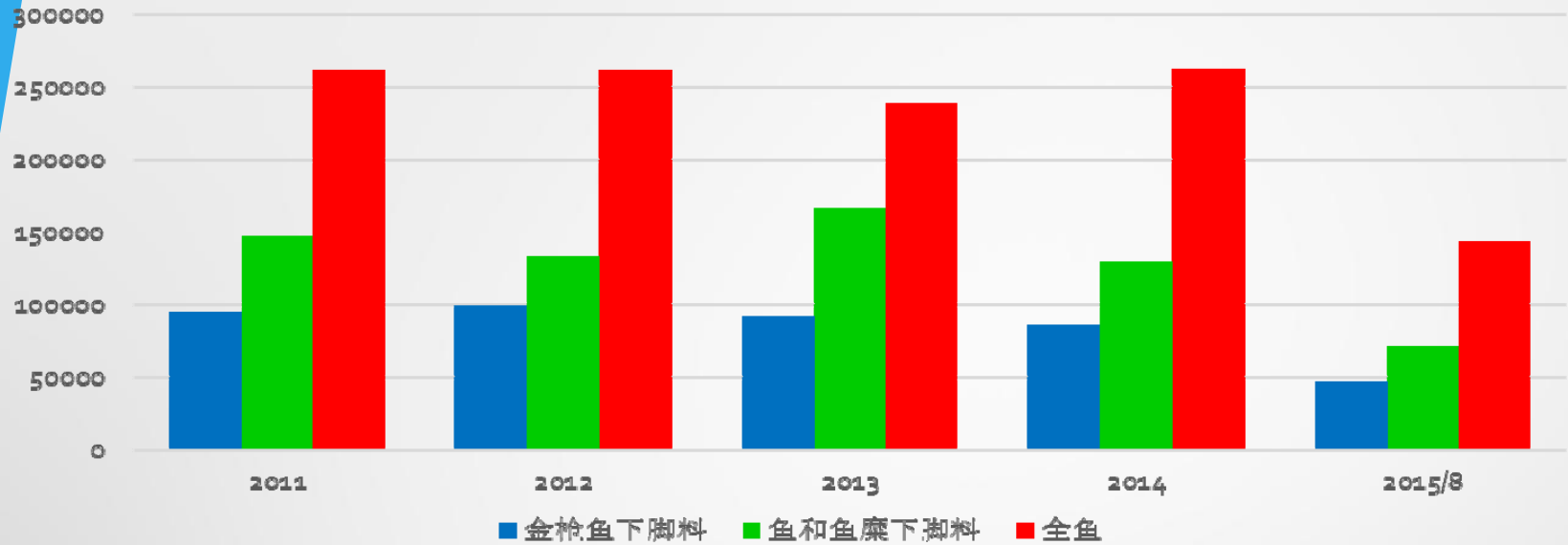
Unit: mt



	2011	2012	2013	2014	2015/8	2015 预测
产量	505,000	503,000	493,000	478,000	261,240	350000
出口	112,000	76,000	128,000	179,000	116,500	150,000
国内市场	393,000	427,000	369,000	299,000	144,740	200,000

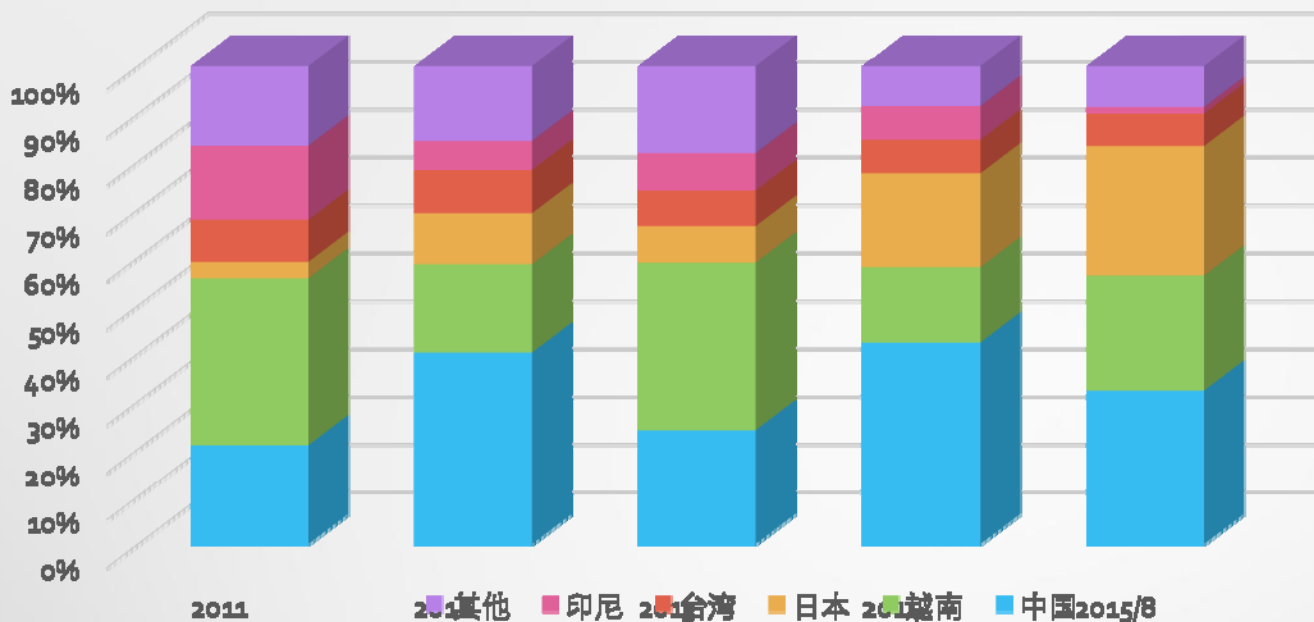
■ 产量 ■ 出口 ■ 国内市场

FM Production per Fish Species



YEAR	2011	2012	2013	2014	2015/8
Tuna scraps	95,000 (19%)	99,000 (20%)	92,000 (19%)	86,000 (18%)	47,020 (18%)
Fish & surimi waste	147,000 (29%)	133,000 (27%)	166,000 (33%)	129,000 (27%)	70,535 (27%)
Whole Fish	281,000 (52%)	261,000 (53%)	289,000 (48%)	263,000 (55%)	143,682 (55%)
Total	503,000	493,000	497,000	478,000	261,240

Thailand FM Export (2011- Aug 2015)

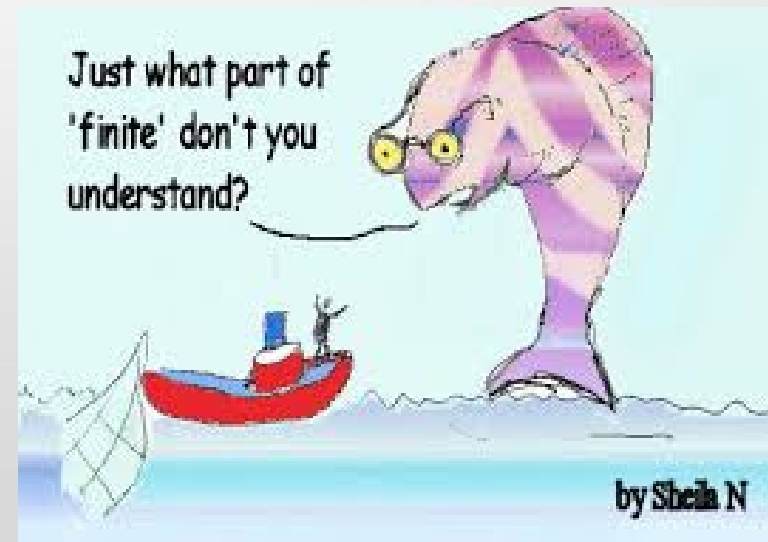


Unit: mt

YEAR	2011	2012	2013	2014	2015/8
China	15,872 (21%)	25,433 (40%)	30,896 (24%)	75,927 (42%)	37,667 (32%)
Vietnam	26,442 (35%)	11,651 (35%)	44,862 (35%)	28,147 (16%)	27,958 (24%)
Japan	2,474 (8%)	6,709 (3%)	9,724 (11%)	35,057 (20%)	31,454 (27%)
Taiwan	6,671 (9%)	5,713 (9%)	9,548 (9%)	12,548 (7%)	7,886 (7%)
Indonesia	11,702 (6%)	3,821 (15%)	9,997 (6%)	12,625 (7%)	1,600 (1%%)
Others	12,579 (11%)	9,857 (17%)	23,372 (16%)	14,875 (8%)	9,935 (9%%)
Total	75,720	63,184	128,399	179,179	116,499

Current Situation of Thai Fishmeal Industry

Department of Fisheries Thailand has released corresponding measures to cope with the IUU (Illegal Fishing, Unreported Fishing, Unregulated Fishing) rules of European Union, bringing great impact to the fishmeal industry of Thailand.

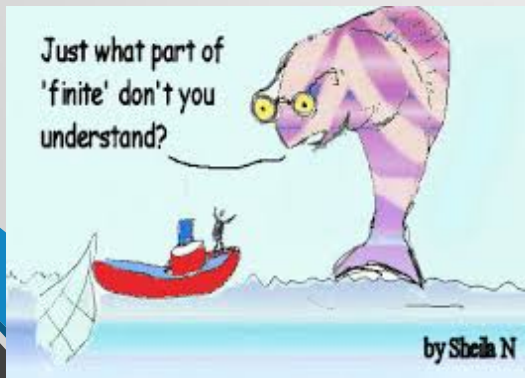


Thailand Fishing Boats

No. of Fishing Boat (2015/7/21)						
Capacity (MT)	Registered	Reported	Licensed	License expired	No License	Licensed but no reported
> 5mt	26,019	24,844	15,196	437	9,211	10,386
5-10 mt	4,670	4,137	3,479	169	489	1,022
10- 20 mt	4,316	2,923	2,671	24	228	1,621
20- 30 mt	2,554	1,628	1,496	28	104	1,030
30- 60 mt	3,869	3,715	3,700	13	2	156
> 60 mt	3,339	2,659	2,659	-	-	680
Total	44,767	39,906	29,201	671	10,034	14,895

Thailand FM Tendency SH 2015

Supply	Reduced from 500,000 to 350,000 mt
Demand	Demand Increasing 20% in Shrimp/Aqua feed
Price	FM supply reduced, Price at high level



Latest News

On September 17, having seen the ceaseless efforts of the Thai fishery departments, the EU changed its IUU warning on Thai fishery industry to a corrective action request within six months. If improvements can be made to an acceptable level, Thailand will be allowed to export aquatic products to EU market.

Thanks for your attention!

Any questions?

The Thai Fishmeal Producers Association

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