



# Thai Tuna Industry “The New Challenges”



By



**Dr. Chanintr Chalisarapong**  
Chairman of Thai Tuna Processors' Group  
Senior Vice President of Sea Value Group, Thailand

1. THAI'S EXPORT OF TUNA PRODUCTS (INCLUDING TUNA PET FOOD) IN 2009-2011
2. CANNED TUNA AND TUNA LOIN SITUATION IN 2009-2011
  - 2.1 EXPORT OF THAI TUNA PRODUCTS
  - 2.2 EXPORT OF THAI TUNA PRODUCTS TO **THE EU**
    - **EU's Import of Tuna Loin from Top 10 Countries**
  - 2.3 EXPORT OF THAI TUNA PRODUCTS TO **THE MIDDLE EAST AND AFRICA**
3. THAI'S IMPORT OF FROZEN RAW TUNA IN 2009-2011
4. CURRENT SITUATION **2012**
  - 4.1 THAI'S IMPORT OF FROZEN RAW TUNA
  - 4.2 THAI'S EXPORT OF TUNA PRODUCTS
5. **NEW CHALLENGES**

# 1. THAI'S EXPORT OF TUNA PRODUCTS (INCLUDING TUNA PET FOOD) IN 2009-2011

| Products                | Quantity (ton) |         |         | % Growth  | Value (Million US \$) |       |       | % Growth  |
|-------------------------|----------------|---------|---------|-----------|-----------------------|-------|-------|-----------|
|                         | 2009           | 2010    | 2011    | 10/11     | 2009                  | 2010  | 2011  | 10/11     |
| Canned Tuna + Tuna Loin | 534,700        | 588,727 | 576,241 | -2        | 1,684                 | 1,879 | 2,298 | 17        |
| Tuna Petfood            | 80,520         | 69,885  | 69,461  | -1        | 193                   | 165   | 186   | 7         |
| <b>Total</b>            | 615,220        | 658,612 | 645,702 | <b>-2</b> | 1,877                 | 2,044 | 2,484 | <b>16</b> |

## 2. CANNED TUNA AND TUNA LOIN SITUATION IN 2009-2011

### 2.1 EXPORT OF THAI TUNA PRODUCTS

### 2.2 EXPORT OF THAI TUNA PRODUCTS TO THE EU

#### - EU's Import of Tuna Loin from Top 10 Countries

### 2.3 EXPORT OF THAI TUNA PRODUCTS TO THE MIDDLE EAST AND AFRICA

## 2.1 EXPORT QUANTITY OF THAI TUNA PRODUCTS IN 2009-2011

| COUNTRIES                 | QUANTITY (tones) |         |         | % Growth<br>10/11 | % Share<br>2011 |
|---------------------------|------------------|---------|---------|-------------------|-----------------|
|                           | 2009             | 2010    | 2011    |                   |                 |
| USA                       | 112,730          | 117,352 | 99,372  | -15               | 19              |
| EU                        | 67,728           | 71,380  | 79,764  | 12                | 15              |
| MIDDLE EAST               | 60,364           | 63,157  | 60,364  | -4                | 11              |
| CANADA                    | 30,753           | 28,835  | 28,768  | 0                 | 5               |
| AUSTRALIA/<br>NEW ZEALAND | 36,946           | 46,006  | 46,809  | 2                 | 9               |
| JAPAN/ TAIWAN             | 26,024           | 25,433  | 32,158  | 26                | 6               |
| NEW MARKETS               | 159,777          | 183,317 | 188,098 | 3                 | 35              |
| WORLD                     | 494,322          | 535,480 | 535,333 | -0.03             | 100             |

## 2.1 EXPORT VALUE OF THAI TUNA PRODUCTS IN 2009-2011

| COUNTRIES                 | Value (Million US \$) |       |       | % Growth<br>10/11 | % Share<br>2011 |
|---------------------------|-----------------------|-------|-------|-------------------|-----------------|
|                           | 2009                  | 2010  | 2011  |                   |                 |
| USA                       | 360                   | 387   | 405   | 5                 | 19              |
| EU                        | 212                   | 235   | 320   | 36                | 15              |
| MIDDLE EAST               | 183                   | 197   | 182   | -8                | 9               |
| CANADA                    | 109                   | 107   | 130   | 21                | 6               |
| AUSTRALIA/<br>NEW ZEALAND | 144                   | 180   | 223   | 24                | 11              |
| JAPAN/ TAIWAN             | 118                   | 114   | 166   | 46                | 8               |
| NEW MARKETS               | 424                   | 460   | 669   | 45                | 32              |
| WORLD                     | 1,550                 | 1,680 | 2,095 | 25                | 100             |



## 2.2 EXPORT OF THAI TUNA PRODUCTS TO EU

| COUNTRIES      | VALUE (Mil.US\$) |      |      | % GROWTH 10/11 | % SHARE 2011 | QUANTITY (Tones) |        |        | % GROWTH 10/11 | % SHARE 2011 |
|----------------|------------------|------|------|----------------|--------------|------------------|--------|--------|----------------|--------------|
|                | 2009             | 2010 | 2011 |                |              | 2009             | 2010   | 2011   |                |              |
| United Kingdom | 53               | 52   | 93   | 79             | 29           | 16,954           | 13,961 | 22,826 | 63             | 29           |
| France         | 33               | 30   | 40   | 33             | 13           | 9,495            | 7,579  | 8,286  | 9              | 10           |
| Netherlands    | 15               | 21   | 28   | 33             | 9            | 5,070            | 7,676  | 7,586  | -1             | 10           |
| Finland        | 19               | 21   | 24   | 14             | 8            | 6,019            | 6,727  | 5,982  | -11            | 7            |
| Poland         | 12               | 14   | 15   | 7              | 5            | 4,609            | 5,294  | 4,759  | -10            | 6            |
| Spain          | 8                | 14   | 14   | 0              | 4            | 2,449            | 3,485  | 2,798  | -20            | 4            |
| Germany        | 14               | 17   | 11   | -35            | 3            | 4,068            | 5,496  | 3,242  | -41            | 4            |
| Denmark        | 5                | 6    | 10   | 67             | 3            | 1,487            | 1705   | 2352   | 38             | 3            |
| OTHERS EU 27   | 53               | 60   | 85   | 42             | 27           | 17,577           | 19,457 | 21,933 | 13             | 27           |
| TOTAL EU 27    | 212              | 235  | 320  | 36             | 100          | 67,728           | 71,380 | 79,764 | 12             | 100          |



# EU's Import of Tuna Loin (code 1604 14 16) from Top 10 Countries

| COUNTRIES        | VALUE (Mil.Euro) |                |                | % Growth 10/11 | % Share 2011 | QUANTITY (Tones) |               |                | % Growth 10/11 | % Share 2011 |
|------------------|------------------|----------------|----------------|----------------|--------------|------------------|---------------|----------------|----------------|--------------|
|                  | 2009             | 2010           | 2011           |                |              | 2009             | 2010          | 2011           |                |              |
| Ecuador          | 140,445          | 130,146        | 149,085        | 15             | 37           | 43,916           | 37,212        | 36,460         | -2             | 36           |
| Thailand         | 65,406           | 35,167         | 53,945         | 53             | 13           | 16,919           | 12,178        | 16,402         | 35             | 16           |
| Mauritius        | 41,130           | 48,766         | 49,318         | 1              | 12           | 11,738           | 12,575        | 11,722         | -7             | 12           |
| Guatemala        | 18,854           | 33,167         | 28,926         | -13            | 7            | 5,736            | 8,659         | 7,222          | -17            | 7            |
| El Salvador      | 51,033           | 32,206         | 25,857         | -20            | 6            | 13,106           | 7,587         | 5,828          | -23            | 6            |
| China            | 15,519           | 15,214         | 22,568         | 48             | 6            | 4,441            | 5,418         | 6,455          | 19             | 6            |
| Kenya            | 11,209           | 15,475         | 22,372         | 45             | 6            | 3,152            | 3,686         | 4,240          | 15             | 4            |
| Papua New Guinea | 6653             | 8810           | 21,130         | 140            | 5            | 1,766            | 2485          | 5,612          | 126            | 6            |
| Solomon Islands  | 8,575            | 8,057          | 19,320         | 140            | 5            | 2,176            | 1925          | 4,329          | 125            | 4            |
| Colombia         | 10,901           | 8,767          | 13,891         | 58             | 3            | 2,744            | 1,938         | 2,965          | 53             | 3            |
| <b>TOTAL</b>     | <b>369,725</b>   | <b>335,775</b> | <b>406,412</b> | <b>21</b>      | <b>100</b>   | <b>105,694</b>   | <b>93,663</b> | <b>101,235</b> | <b>8</b>       | <b>100</b>   |



## 2.3 EXPORT OF THAI TUNA PRODUCTS TO THE MIDDLE EAST AND AFRICA

| COUNTRIES    | VALUE (Mil.US\$) |              |              | % Growth 10/11 | % Share 2011 | QUANTITY (Tones) |                |                | % Growth 10/11 | % Share 2011 |
|--------------|------------------|--------------|--------------|----------------|--------------|------------------|----------------|----------------|----------------|--------------|
|              | 2009             | 2010         | 2011         |                |              | 2009             | 2010           | 2011           |                |              |
| LIBYA        | 97               | 69           | 54           | -22            | 15           | 33,604           | 23,679         | 15,001         | -37            | 14           |
| EGYPT        | 94               | 116          | 138          | 19             | 37           | 40,579           | 51,933         | 47,280         | -9             | 43           |
| SAUDI ARABIA | 51               | 59           | 85           | 44             | 23           | 16,882           | 19,064         | 21,037         | 10             | 19           |
| JORDAN       | 14               | 14           | 11           | -21            | 3            | 4,664            | 4,969          | 2,880          | -42            | 3            |
| SYRIA        | 36               | 28           | 38           | 36             | 10           | 13,181           | 9,404          | 10,406         | 11             | 10           |
| YEMEN        | 17               | 18           | 28           | 56             | 8            | 5,368            | 6,292          | 7,520          | 20             | 7            |
| SUDAN        | 2                | 2            | 5            | 150            | 1            | 830              | 842            | 1,861          | 121            | 2            |
| IRAN         | 3                | 8            | 9            | 13             | 2            | 828              | 2279           | 2,086          | -8             | 2            |
| OMAN         | 2                | 2            | 3            | 50             | 1            | 561              | 812            | 1,030          | 27             | 1            |
| TURKEY       | 1                | 0.5          | 0.5          | 0              | 0            | 270              | 196            | 140            | -29            | 0            |
| <b>TOTAL</b> | <b>317</b>       | <b>316.5</b> | <b>371.5</b> | <b>17</b>      | <b>100</b>   | <b>116,767</b>   | <b>119,470</b> | <b>109,241</b> | <b>-9</b>      | <b>100</b>   |

### 3. THAI'S IMPORT OF FROZEN RAW TUNA IN 2009-2011

| Raw Material | Quantity (ton by net wt.) |         |         | % Growth 10/11 | Value( million US\$) |       |       | % Growth 10/11 |
|--------------|---------------------------|---------|---------|----------------|----------------------|-------|-------|----------------|
|              | 2009                      | 2010    | 2011    |                | 2009                 | 2010  | 2011  |                |
| Albacore     | 39,546                    | 48,892  | 42,906  | -12            | 104                  | 130   | 129   | -0.2           |
| Yellow fin   | 92,656                    | 103,538 | 89,392  | -14            | 128                  | 159   | 191   | 20             |
| Skipjack     | 668,515                   | 650,488 | 631,881 | -3             | 771                  | 804   | 1,053 | 31             |
| Big eye      | 11,041                    | 14,091  | 7,024   | -50            | 12                   | 16    | 13    | -19            |
| Total        | 811,758                   | 817,009 | 771,203 | -6             | 1,015                | 1,109 | 1,386 | 25             |

## 4. CURRENT SITUATION IN 2012

### 4.1 THAI'S IMPORT OF FROZEN RAW TUNA



### 4.2 THAI'S EXPORT OF TUNA PRODUCTS



## 4.1 THAI'S IMPORT OF FROZEN RAW TUNA IN 2011-2012 (JAN-FEB)

| FROZEN RAW TUNA | Quantity<br>(tons by net wt.)<br>(JAN-FEB) |         | % GROWTH<br>(JAN-FEB) | Value<br>(million US\$)<br>(JAN-FEB) |      | % GROWTH<br>(JAN-FEB) |
|-----------------|--|---------|-----------------------|--------------------------------------|------|-----------------------|
|                 | 2011                                       | 2012    |                       | 2011                                 | 2012 |                       |
| Albacore        | 8,976                                      | 8,529   | -5                    | 24                                   | 30   | 25                    |
| Yellow fin      | 14,896                                     | 26,079  | 75                    | 24                                   | 60   | 150                   |
| Skipjack        | 143,928                                    | 86,163  | -40                   | 193                                  | 167  | -13                   |
| Big eye         | 524  | 689     | 31                    | 1                                    | 1    | 75                    |
| Total           | 168,324                                    | 121,460 | -28                   | 242                                  | 258  | 7                     |

## 4.2 EXPORT OF THAI TUNA PRODUCTS IN 2011-2012 (JAN-FEB)

| PRODUCTS                   | Quantity<br>(tons by net wt.)<br>(JAN-FEB) |               | %<br>GROWTH<br>(JAN-FEB) | Value<br>(million US\$)<br>(JAN-FEB) |            | %<br>GROWTH<br>(JAN-FEB) |
|----------------------------|--|---------------|--------------------------|--------------------------------------|------------|--------------------------|
|                            | 2011                                       | 2012          |                          | 2011                                 | 2011       |                          |
| Canned Tuna<br>+ Tuna Loin | 97,002                                     | 80,730        | -17                      | 321                                  | 372        | 16                       |
| Tuna<br>Pet Food           | 9,995                                      | 9,761         | -2                       | 25                                   | 29         | 16                       |
| <b>Total</b>               | <b>106,997</b>                             | <b>90,491</b> | <b>-15</b>               | <b>346</b>                           | <b>401</b> | <b>16</b>                |

## 5. NEW CHALLENGES

**5.1 Decreasing in Raw Materials Quantity**

**5.2 Increasing in Raw Material Price (SKJ)**

**5.3 Increasing Wage**

**5.4 Cooperation with NGOs**

## 5. NEW CHALLENGES

### 5.1 Decreasing in Raw Materials Quantity

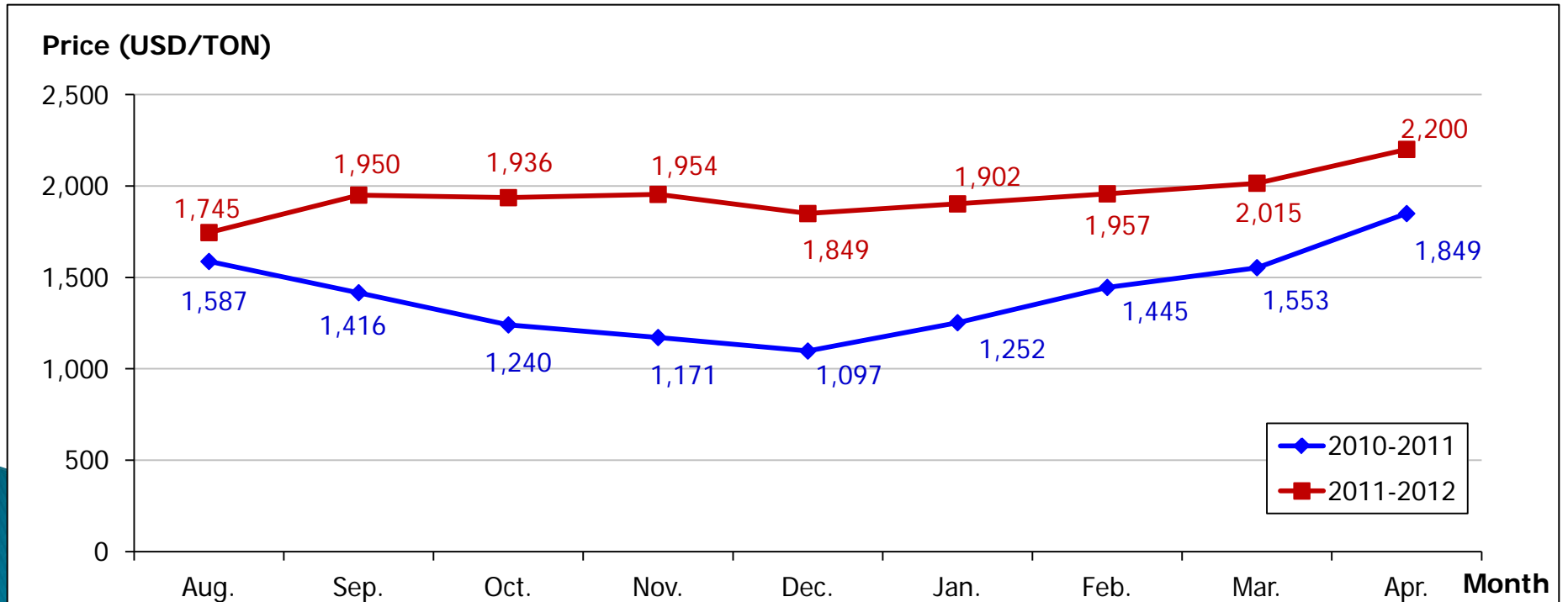
| Thai's Import Quantity of Raw Materials (Ton) | Aug.   | Sep.   | Oct.    | Nov.    | Dec.   | Jan.    | Feb.   | Mar.    | Total    |
|---|--------|--------|---------|---------|--------|---------|--------|---------|----------|
| 2010-2011                                     | 57,775 | 55,573 | 57,454  | 89,974  | 67,179 | 94,070  | 76,254 | 72,129  | 570,408  |
| 2011-2012                                     | 60,073 | 49,545 | 32,284  | 39,208  | 58,948 | 42,631  | 78,828 | 56,488  | 418,005  |
| Difference                                    | 2,298  | -6,028 | -25,170 | -50,766 | -8,231 | -51,439 | 2,574  | -15,641 | -152,403 |
| % Growth                                      | 4      | -11    | -44     | -56     | -12    | -55     | 3      | -22     | -27      |

**Remark :** Quantity of ALB , YF , SKJ and BE

# 5. NEW CHALLENGES

## 5.2 Increasing in Raw Material (SKJ) Price

| Price of Skipjack (USD/Ton) | Aug.  | Sep.  | Oct.  | Nov.  | Dec.  | Jan.  | Feb.  | Mar.  | Apr.  |
|-----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2010-2011                   | 1,587 | 1,416 | 1,240 | 1,171 | 1,097 | 1,252 | 1,445 | 1,553 | 1,849 |
| 2011-2012                   | 1,745 | 1,950 | 1,936 | 1,954 | 1,849 | 1,902 | 1,957 | 2,015 | 2,200 |
| % Change                    | 10    | 62    | 56    | 67    | 69    | 52    | 35    | 30    | 19    |





## 5. NEW CHALLENGES

### 5.3 Increasing in Wage

| Wage | Minimum wage (Baht/ day)             | Social Welfare + Extra Income (Baht/ day) | TOTAL (Baht) | TOTAL (USD)<br>(1USD = 30 Baht) |
|------|--------------------------------------|---|--------------|---------------------------------|
| 2011 | 215                                  | 135                                       | 350          | 11.67                           |
| 2012 | 300<br>(Enforced since 1 April 2012) | 160                                       | 460          | 15.33                           |

*34 % Increasing Wage !!!*

# 5. NEW CHALLENGES

## 5.4 Cooperation with NGOs



Certified from sustainable fisheries  
[www.friendofthesea.org](http://www.friendofthesea.org)



**THANK YOU**