

International Fish Trade Profile: Thailand

Ms Thumawadee Jaiyen

2018 Regional Fisheries Policy Network (RFPN) Member for Thailand

INTRODUCTION

Thailand is one of the top fish producing countries in the world owing to its geographic location that enables the country to yield high annual fish production. The country has a coastline of about 2,600 km and fishing grounds that cover a total area of about 316, 000 km² within Thailand’s Exclusive Economic Zone (EEZ) including the Gulf of Thailand and Andaman Sea. An estimated 60 % of the total marine catch was caught in Thai waters (41 % caught in the Gulf of Thailand and 19 % in the Andaman Sea) and the 40 % was from waters outside the Thai EEZ. Further, the country’s coastal area has about one million hectare suitable for coastal aquaculture. In addition to marine waters, Thailand’s inland waters cover approximately 3,750 km² (FAO, 2018).

FISHERIES PRODUCTION

The fisheries production in Thailand is derived from capture (marine and inland) and aquaculture (coastal and freshwater). The production between 2012 and 2016 is shown in **Figure 1**. From 2012 to 2016, the marine capture production was the highest in terms of quantity while the coastal aquaculture production was the highest in terms of value.

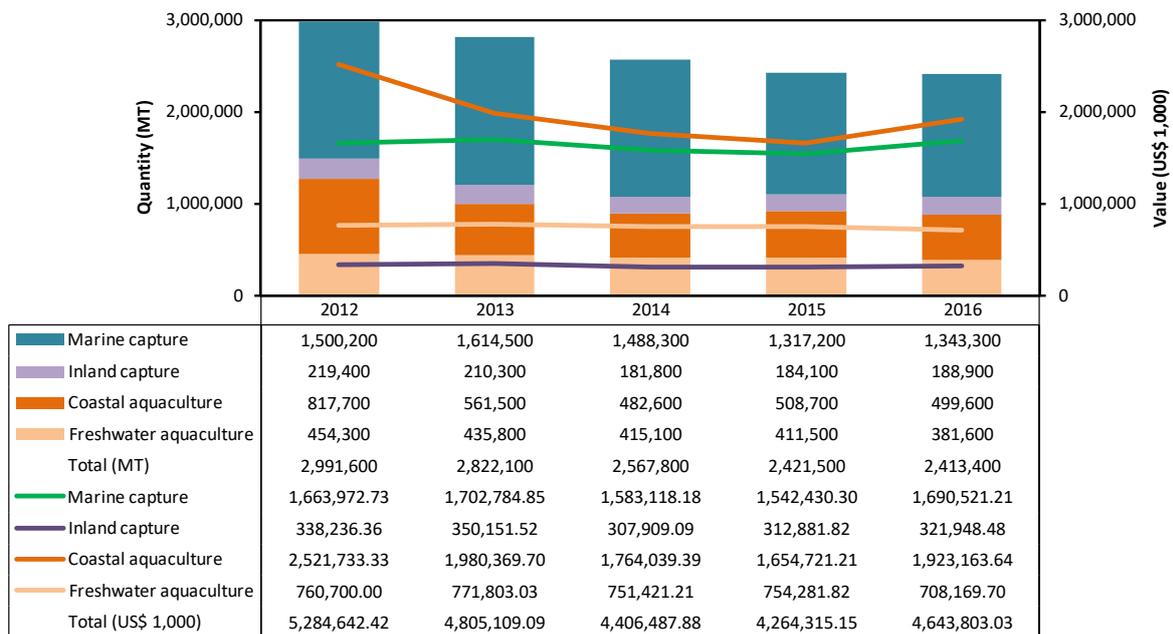


Figure 1. Fisheries production of Thailand from 2012 to 2016 by quantity (MT) and value (US\$ 1,000)

Source: DOF, 2017

INTERNATIONAL FISH TRADE

During the past decades, the exports of fishery products have expanded and Thailand has been one of the world's top exporters. The country is also one of the global top importers of fishery products which are mostly used as raw materials for re-exported processed products (FAO, 2018). The total quantity and value of fishery products exported and imported by Thailand in 2014-2017 are shown in **Figure 2**. In 2017, canned seafood products were the principal commodities exported by the country (**Figure 3**). The top country of destination of exported fishery products was the USA in terms of value in the same year (**Figure 4**). For imported fishery products, fish was the major commodity in 2017 (**Figure 5**). Member States of the ASEAN are the major suppliers of fishery products to Thailand in terms of quantity and value in 2017 (**Figure 6**).

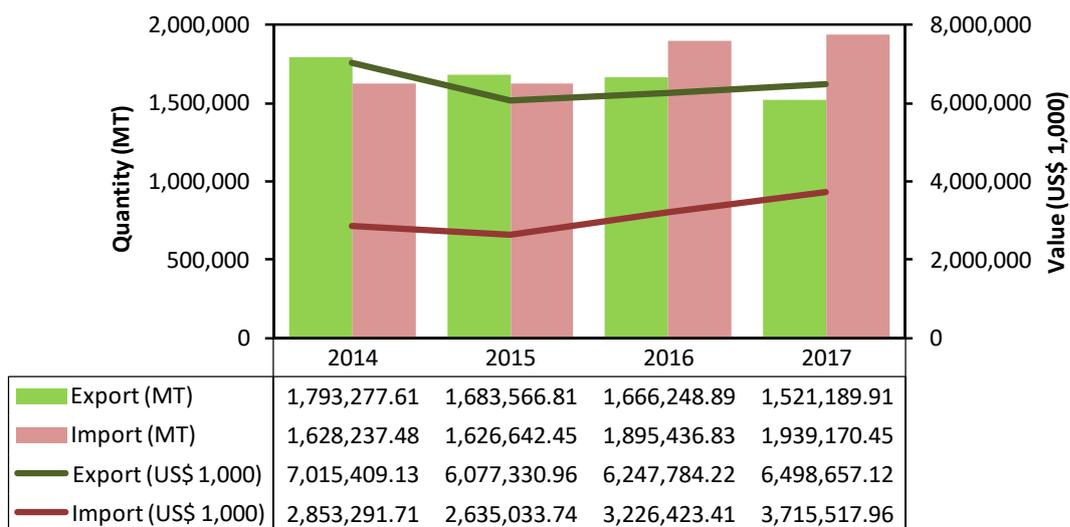


Figure 2. Export and import of fishery products of Thailand in 2014-2017 by quantity (MT) and value (US\$ 1,000)

Source: DOF, 2017

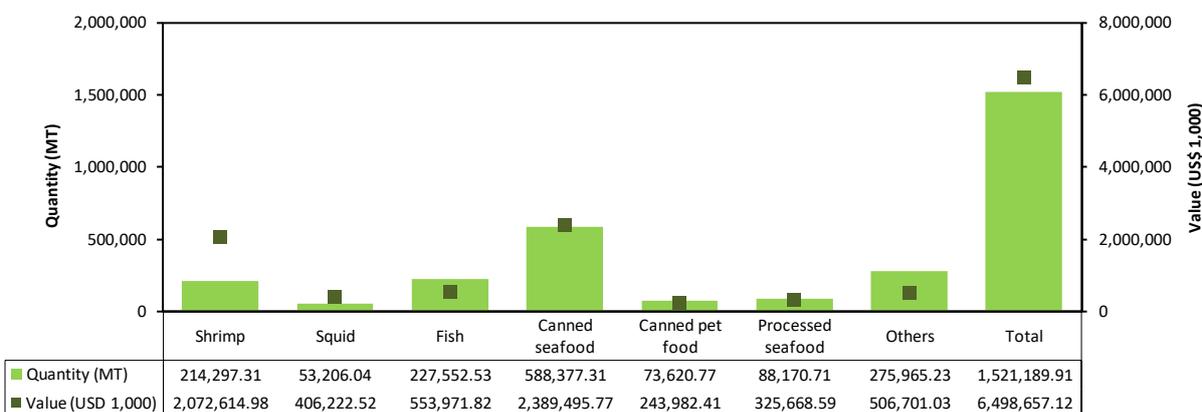


Figure 3. Quantity (MT) and value (US\$ 1,000) of fishery products exported by Thailand in 2017

Source: DOF, 2017

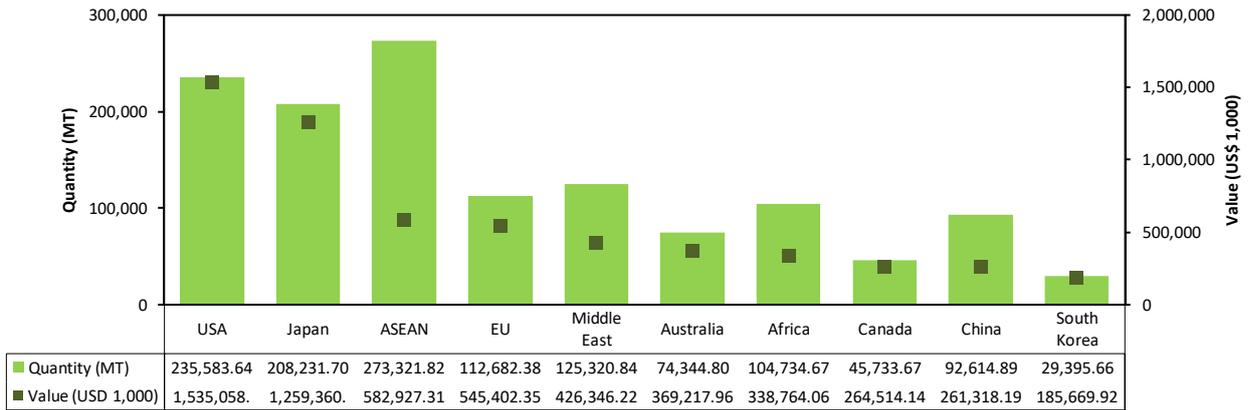


Figure 4. Top 10 groups of countries/countries of destination according to value (US\$ 1,000) of fishery products exported by Thailand in 2017
Source: DOF, 2017

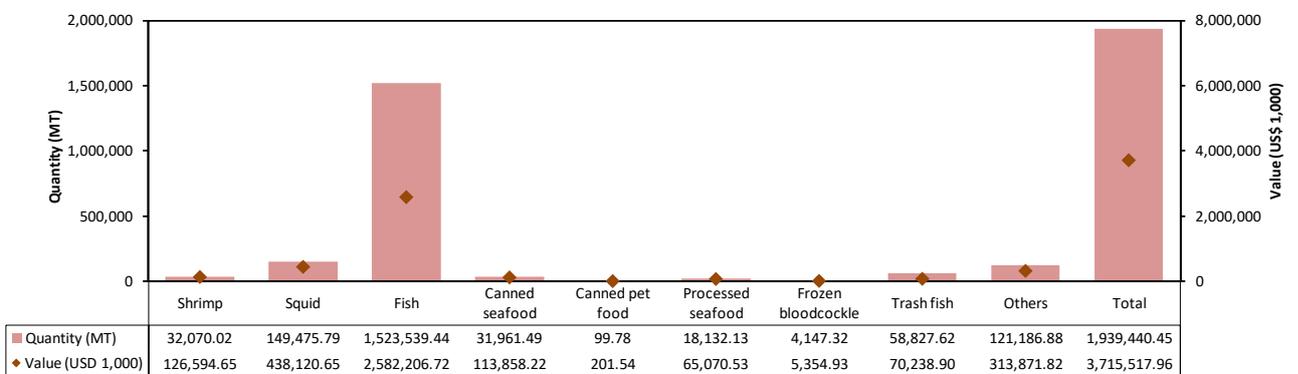


Figure 5. Quantity (MT) and value (US\$ 1,000) of fishery products imported by Thailand in 2017
Source: DOF, 2017

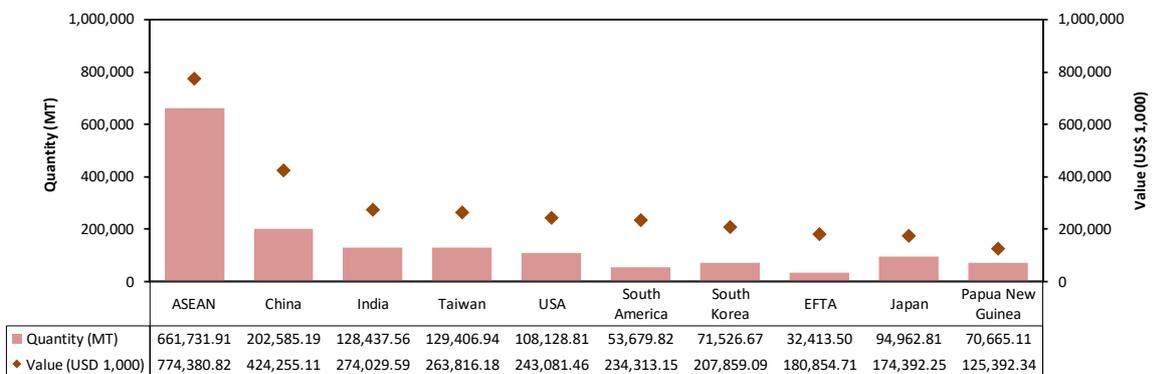


Figure 6. Top 10 groups of countries/countries of origin according to value (US\$ 1,000) of fishery products imported by Thailand in 2017
Source: DOF, 2017

FISH TRADE POLICIES

The management and development of the Thai fishing industry is the responsibility of the Department of Fisheries (DOF). The Department works closely with various organizations, both governmental and private to ensure efficient management and sustainable development of fisheries as well as to promote the export of fish and fishery products. In terms of development of the export of fishery products, the DOF works closely with the Department of Foreign Trade and Department of Export Promotion under the Ministry of Commerce, Department of Customs under the Ministry of Finance, Department of Medical Services and the Food and Drug Administration both under the Ministry of Public Health. For matters related to imports related to fisheries, the DOF cooperates with the Department of Industrial Works under the Ministry of Industry. Also, various private organizations such as the Thai Frozen Foods Association, Food Processors Association of Thailand, Thai Shrimp Association, and Ornamental Fish Association are working closely with the DOF in respect of matters concerning production and export of fishery products.

Under the Royal Ordinance on Fisheries B.E. 2558 (2015), the excerpts from the Royal Ordinance related to the trade of fishery products in Thailand are shown in **Box**. This Royal Ordinance aims to reorganize fisheries in Thailand and in waters at large with a view to preventing IUU fishing in order to preserve aquatic animal resources as a sustainable source of food for humanity and preserve the environment.

Box. Excerpts from the Royal Ordinance on Fisheries B.E. 2558 (2015) related to the trade of fishery products in Thailand

Section 65. For the purposes of protecting rare aquatic animal species or preventing danger caused by an epidemic disease, the Minister shall have the power to prohibit the importation, exportation, bringing in transit, culturing or possession of any kind of aquatic animal.

No person shall import, export, bring in transit, breed or have in possession aquatic animals pursuant to paragraph one unless a license is obtained from the Director-General or a person designated by the Director-General.

Section 90. (6) an importer, exporter or person who brings in transit aquatic animals and aquatic animal products shall present a catch certificate, or any other document to prove that the aquatic animals and aquatic animal products are obtained from a lawful fishing operation as provided in section 92, whichever is applicable.

Section 92. Subject to section 96, no person shall import aquatic animals and aquatic animal products unless permission is obtained from a competent official.

Any person wishing to export or bring in transit aquatic animals and aquatic animal products shall first produce a catch certificate or any other document which proves that such aquatic animals and aquatic animal products are obtained from a legal fishing operation to the competent official for inspection.

The granting of permission pursuant to paragraph one shall be executed only when a catch certificate or any other document is presented proving that such aquatic animals and aquatic animal products are obtained from a lawful fishing operation.

The requesting and granting of permission pursuant to paragraph one shall be in accordance with the rules, procedures and conditions prescribed by the Director-General.

The provision under paragraph one shall not apply to the bringing of aquatic animals caught by a Thai fishing vessel in a lawful fishing operation into the Kingdom. Any such case shall not be regarded as importation.

Section 93. Any exporter of aquatic animals and aquatic animal products wishing to request a catch certificate, or an aquatic animal product production or processing certificate, shall lodge such a

request to the Department of Fisheries in accordance with the forms and procedures, and pay the fees for the issuance of any such certificate as prescribed by regulation issued by the Director-General.

Section 95. A non-Thai fishing vessel wishing to import aquatic animals and aquatic animal products into the Kingdom shall notify the competent official by no less than forty-eight hours in advance prior to its arrival at a port of entry. Data in the notice and ports of entry shall be as designated by the Minister.

Section 96. When a fishing vessel has been authorized to berth at a port pursuant to section 95 and has completed berthing, a request for permission for the importation of aquatic animals shall or aquatic animal products be lodged. After permission therefore has been granted, aquatic animals or aquatic animal products may then be unloaded from the fishing vessel.

The competent official shall not permit any importation under paragraph one unless the owner of the vessel or the master of the vessel can prove that:

- (1) the fishing vessel has been granted a fishing license or a license for activities related to fisheries issued by a flag state or a coastal state;
- (2) the fishing vessel can produce evidence to prove that it has not undertaken IUU fishing;
- (3) the owner of the vessel or the master of the vessel certifies in writing that the flag state shall certify in due course that the aquatic animals caught in accordance with the regulations of the international organizations concerned.

Section 101. (2) enter enterprise premises or place related to the functioning of the licensee's enterprise or place related to the importation, exportation, transit, sale, production or processing of aquatic animals or aquatic animal products during working hours in order to exercise inspection and control to ensure compliance with this Royal Ordinance;

Section 158. Any person violating section 92 paragraph one or producing a false catch certificate or any other false document pursuant to section 92 paragraph two shall be subject to a fine of five times the value of the animals imported, exported or transited.

Fee rates. A permit for the importation or exportation of aquatic animals or aquatic products 500 baht per copy

Table 1 describes the procedures on exporting live aquatic animals or their carcasses from Thailand and the procedures on importing of aquatic animals to Thailand are shown in **Table 2**.

Table 1. Procedures on exporting live aquatic animals or their carcasses from Thailand

Stage	Procedures
Pre-export	<ol style="list-style-type: none"> 1. Exporter of aquatic animals and their carcasses should seek permission from the Fish Inspection Office (FIO) or provincial fishery office (authorized as FIO) at the port of export. 2. Exporter should submit the application and required documents at least three days prior to export 3. FIO office will register and inspect the submitted documents 4. In case incomplete documents, the exporter will be notified to resubmit the complete one 5. Officer who accepts the documents will present the superior officer for the final consideration and will issue the documents within three working days 6. If the application has been denied, the applicant will be notified as soon as possible 7. As the permit documents (in 5.) has been issued, the exporter should notify the official about the date, time, port of export, airplane flight, vessel number or other means of transportation for export by a day prior to the export.

On the day of export	<ol style="list-style-type: none"> 1. Exporter must show all the required documents to the FIO Officer or fishery officer from the provincial office authorized as FIO at the site of port. 2. Documents and the aquatic animals will be inspected by fishery officer before permit is issued 3. Species, size, quantity of the exported aquatic animals must be the same as stated in the export permit or not exceeding the permit 4. Export permit can be used only once. 5. During the withholding process of export aquatic animals, the exporter will be responsible for all the process (including maintenance and costs).
----------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Source: DOF, 2012

Table 2. Procedures on importing aquatic animals to Thailand

Stage	Procedures
Pre-import	<ol style="list-style-type: none"> 1. Importer should receive the Import Permit (prior to an importation from FIO or provincial fishery office at the port of entry. 2. The request form must be present at least seven days in advance unless the animals are brought along with the importer in which the permit can be requested at site (wild aquatic animals are prohibited). 3. If the importer wants to withhold the imported live or dead aquatic animals for health quarantine in other places rather than the Department of Fishery facilities. Those places must be approved according to the Department's regulations. 4. As the request form is presented, the FIO officer will register and inspect all the required documents. Aquatic animals will be carefully inspected with any kind of disease. Live aquatic animals must not be alien species. 5. Any missing document, the request form will be returned to the applicant to resubmit all the required documents. 6. Officer who accepts the documents will present the superior officer for the final consideration and will issue the following official documents within three working days. 7. If the request has been denied as considered by authorized officers, the applicant will be informed as soon as possible. 8. After the request has been approved (as document in 6.), the importer must confirm the importing information <i>i.e.</i> date, time, airline flight, vessel number or other transportation mode by one day before the arrival of the aquatic animals.
On the day of import	<ol style="list-style-type: none"> 1. Importer must show all the required documents to the FIO Officer or fishery officer from the provincial office at the site of port. 2. Officer inspects the completeness of the documents and aquatic animals and proceeds. 3. Species, size, and amount of imported animals must be the same as specified in the import permit or not over or more than as permitted. 4. Import permit or permit document for each application can be used only once 5. Process and cost of withholding for quarantine or other required inspections of imported aquatic animals or products will be the responsibility of the importer

Source: DOF, 2012

With regards to food safety, the authorized Ministries and Departments and their responsibilities in maintaining food safety in Thailand are shown in **Table 3**. Under the DOF, one of the most important Divisions is the Fish Inspection and Quality Control Division (FIQD) which provides adequate services to private sector. FIQD not only focuses on certification and inspection of final products but also places an emphasis on introducing various recommended fish quality control programs to be implemented by the industry, for instance, Hazard Analysis Control Critical Point (HACCP), Quality Management Program (QMP), ISO 9000, etc. The country's food safety program serves as a platform for handling, preparing, and storing food in the best ways to reduce the risk of humans from becoming

sick from food borne illnesses as well as prevent food from becoming contaminated and cause food poisoning. The standards described in the **Table 4** are being followed for exporting and importing fishery products in Thailand.

Table 3. Authorized Ministries and Departments and their responsibilities in maintaining food safety in Thailand

Ministry and Department	Responsibility	Food regulations/standards and authority
Ministry of Public Health <ul style="list-style-type: none"> • Food and Drug Administration (FDA) • Department of Health (DOH) 	safety and quality of food and importation of food for domestic consumption through standard setting and control of using the standard of food, labeling, advertisement, and packaging	- Food Act B.E, 2522 (1979) under FDA
Ministry of Agriculture and Cooperatives <ul style="list-style-type: none"> • Department of Livestock Development (DLD) • Department of Agriculture (DOA) • Department of Fisheries (DOF) 	safety and quality of food at farm production for domestic and exportation and food (fresh and processed food) through standard setting and control of using the standards	- Animal Epidemic Act B.E. 2490 (1956) under DLD - Feed Quality Control Act B.E. 2525 (1982) under DLD - Animals and Animals Carcasses Act B.E. 2544 (2001) under DOA - Plant Quarantine Act B.E. 2507 (1964) under DOA - Plant Varieties Protection Act B.E. 2542 (1999) under DOA - Fisheries Act B.E. 2490 (1947) under DOF
National Food Commission	formulation of national policy direction and strategies covering all dimensions of food	

Source: ChemLinked, 2018

Table 4. Food safety standards for exported and imported fishery products in Thailand

Food safety standard	Description
Hazard Analysis Critical Control Points (HACCP)	internationally recognized method of identifying and managing food safety
Good Manufacturing Practices (GMPs)	designed to control the risk of contaminating foods with filth, chemicals, microbes, and other means during their manufacture
Sanitation Standard Operation Procedures (SSOP)	use the quality control systems of HACCP and GMP
Standard Operating Procedures (SOP)	step by step production line procedures by providing the diagram and step-by-step instructions (who, what, where, and how) of a routine activity
Seafood Import Monitoring Program (SIMP)	reporting and record keeping requirements needed to prevent illegal, unreported and unregulated (IUU) fishing and/or misrepresented seafood from entering the USA markets

REFERENCES

- ChemLinked. (2018). Food Regulation in Thailand. Retrieved from <https://food.chemlinked.com/foodpedia/food-regulation-thailand>
- DOF. (2012). Fish Trade Inspection. Ornamental Fish and Aquatic Plant, Thailand Directory 2011-2012. Bureau of Fisheries Administration and Management, Department of Fisheries, Thailand. Retrieved from https://www.fisheries.go.th/aquaorna/web2/images/stories/file_download_pic/import-export.pdf
- DOF. (2017). Fisheries Trade Statistics of Thailand 2016, No.12/2018. Fisheries Development Policy and Strategy Division, Department of Fisheries, Thailand. Retrieved from <https://www.fisheries.go.th/strategy-tradestat/>
- FAO. (2018). Fishery and Aquaculture Country Profiles. The Kingdom of Thailand. Fisheries and Aquaculture Department. Food and Agriculture Organization. Retrieved from <http://www.fao.org/fishery/facp/THA/en>