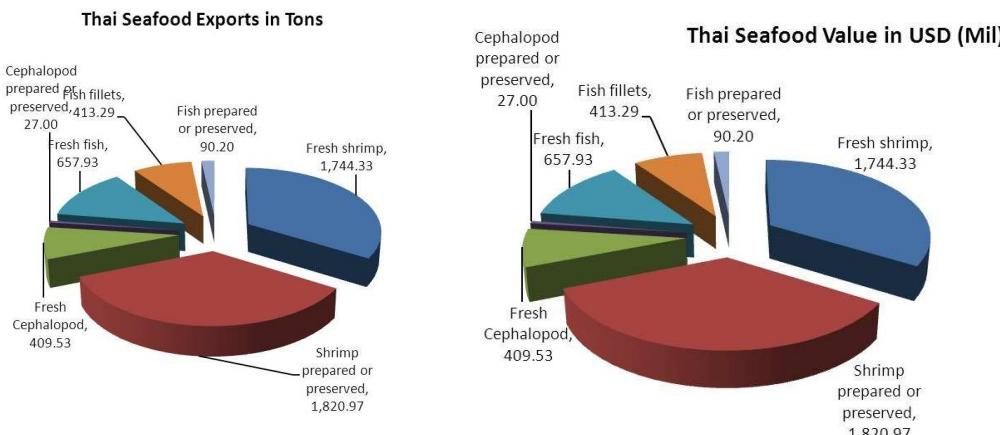


## Thailand's Shrimp and Seafood Industry – a World Leader

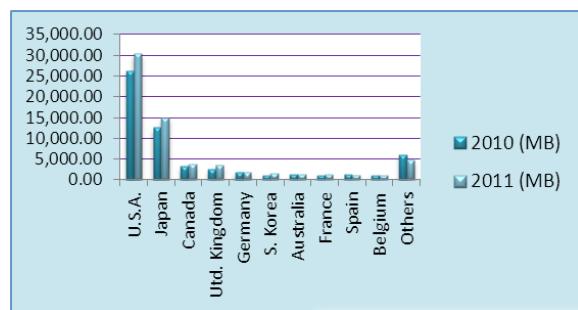
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Thailand has one of the **world's largest fish and seafood industries** and the sector is of vital importance to the country's economy, accounting for 4.0 per cent of total exports. An average of one million metric tons of fish and seafood are sourced from within the country every year, 90 per cent of which are exported. In 2011 these exports were valued at more than US\$ 5.1 billion. In addition, Thailand imports, processes and re-exports another one million tons of fish and seafood from other countries per year. Tuna, shrimp and tilapia are the most important export products<sup>1</sup>.

<sup>1</sup>Sources: Department of Fisheries, Information and Communication Technology Center with Cooperation of The Customs Department (2012).



Thailand is the **number one global exporter of shrimps**. In 2011, the country produced more than 202,000 metric tons of raw shrimp (82 per cent for export and 18 per cent for domestic consumption) and exported more than 380,000 metric tons of fresh, chilled, frozen, prepared, and preserved shrimps, with an approximate value of US\$ 3.56 billion. The United States of America continues to be the most important shrimp importer, (followed by Japan and Canada). Demand for Thai shrimp is increasing worldwide; in 2011 overall exports rose by 16 per cent and to the USA by approximately 13 per cent.



Export Value of Shrimp from Thailand, 2010-2011

*"Shrimp continues to be the most important commodity traded in value terms, accounting for 15 per cent of the total value of internationally traded fish products."*

*FAO. The State of World Fisheries and Aquaculture, Rome (2010).*

## A Productive Industry

The industry comprises around 450 companies. 200 are active fish and seafood processors and about 120 of these are higher grade operators approved to export produce<sup>2</sup>. More than 80 per cent of shrimp production is cultured - especially coastal aquaculture - and the rest derives from marine capture, freshwater culture and inland capture. The main types of shrimp cultivated include white leg shrimp (mainly for export), giant freshwater prawn, banana shrimp and giant tiger prawn (mainly for domestic consumption).



The key costal aquaculture zones are in the Southern provinces of Suratthani, Chantaburi and Songkhla. Shrimp farms are mainly located in Chachoengsao, Suratthani, and Nakhon Si Thammarat. Nationally the shrimp processing industry has more than 150 freezing plants and 50 canning plants, with the highest concentration in Samut Sakhon.

The Department of Fisheries assists the industry with certification schemes (GAP and CoC and GAP/TAS 7401-2009) and a full traceability system aimed at ensuring the quality and competitiveness of Thai shrimp farming. Environmental, welfare and labour concerns are addressed by strong social corporate responsibility policies. The sector is represented by the Thai Frozen Foods Association<sup>3</sup> (with 213 members including 98 affiliated processing and peeling sheds), the National Fisheries Association of Thailand and the Thai Farmers' Association.

## A Vibrant Workforce

Because of its labour-intensive nature the fisheries sector creates a significant number of jobs for Thai citizens as well as a large number of migrant workers from neighbouring countries (Cambodia, Lao PDR, and especially Myanmar). It is estimated that – directly and indirectly – the industry generates employment for approximately 650,000 workers. In freshwater aquaculture alone, approximately 400,000 people are involved in fish farms and related industries such as feed suppliers, distributors, fish traders etc., 78,000 people work in brackish water aquaculture and 184,000 people in processing plants and related industries<sup>4</sup>. The backgrounds and education levels of workers vary. Both upstream and downstream activities (i.e. fish feed, retailing, processing, etc.), require a wide range of skills, expertise, and educational backgrounds. It is estimated that approximately 34 per cent of those employed in the sector are women, particularly in activities related to feed preparation, feeding, harvesting, processing, accounting, marketing, etc. One per cent of the labour force consists of young people above the legal working age of 15 years old.



The industry is facing labour shortages and is actively looking into innovative ways to attract workers and provide decent and productive work opportunities. The industry is participating in a national programme to improve working conditions and innovation throughout the supply chain, assisted by the International Labour Organization in partnership with the Ministry of Labour (Department of Labour Protection and Welfare) and the Ministry of Agriculture and Cooperatives (Department of Fisheries).

<sup>2</sup> Department of Fisheries 2010

<sup>3</sup> TFFA is affiliated to the Thai Chamber of Commerce, the Employers' Confederation of Thailand and the ASEAN Seafood Federation, with links to the National Fisheries Institute.

<sup>4</sup> FAO Fisheries and Aquaculture Report No. 941 – FAO-DOF Workshop on the options for a potential insurance scheme for aquaculture in Thailand, Bangkok, 24-5 September 2009

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