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PACIFIC SALMON TRADE OF SELECTED ASIAN COUNTRIES

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As a result of the U.N. global moratorium on large-scale high seas driftnet fishing which took effect on January 1, 1993, driftnet vessels have been withdrawn from the North Pacific Ocean by Japan, South Korea and Taiwan. This development is expected to result in a major decline in illegal salmon harvests and their sale in other countries. During recent years it has been largely "pirate" Taiwanese vessels that have conducted illegal high seas salmon fisheries in the North Pacific Ocean and laundered the catches through countries in the Asia-Pacific region where the raw product was frozen and canned for export primarily to Europe, Australia and Japan.

During May 1993, four vessels with driftnet gear were sighted in the North Pacific Ocean. One was Honduran-flagged and three were Chinese-flagged. The latter three vessels were later determined to be part of a Sino-Taiwanese cooperative venture company based in Guangdong Province. Canada and the U.S. provided sightings information to the Chinese government for further investigation and prosecution and to ensure that other Chinese fishing vessels did not engage in high seas driftnet fishing. Following these consultations, the Chinese government reportedly penalized the vessel owners and issued new directives on implementing the U.N. moratorium. These sightings indicate both the success of the cooperative surveillance and the need for continued vigilance.

Since 1988, Canada has monitored the sale of salmon products from non-salmon producing countries to countries in Europe, Australia, Japan and North America. The attached tables (Tables I, II and III) provide a summary of the Pacific salmon trade in 1992 from selected Asian countries, total imports of salmon by the European Community from non-salmon producers, and a summary of the Pacific salmon exports by Asian exporters for 1991 and 1992. The data indicates a decline in exports of almost 50 percent in 1992 from those in 1991. Attachment I provides information that during 1992, Thailand recorded significant imports of Pacific salmon from Russia, and Malaysia recorded imports of other salmonidae from New Zealand. While Russia and New Zealand are legitimate sources of salmon, we have not been able to fully verify this data with Russia and New Zealand. 1993 import data has not yet been received.

The cooperation of Canada, Japan, Russia and the United States in implementing the U.N. moratorium on large-scale high seas driftnet fishing and the provisions of the North Pacific Anadromous Stocks Convention have clearly contributed to the elimination of driftnet fishing in the North Pacific Ocean and related driftnet salmon harvesting and marketing. Vigilance, however, must be maintained to prevent unscrupulous foreign fishing vessel operations from flouting the international agreements that have been concluded and the anti-driftnet regulations in force in their own countries.

ATTACHMENT I**THAI IMPORTS OF FROZEN SALMON IN 1992**

Thailand recorded imports of frozen salmon of 4,899t in 1992, up from 404t in 1991. This increase was due almost entirely to an increase in imports from the USSR/CIS, which increased from nil imports in 1991 to 4,074t in 1992.

The Canadian Embassy in Moscow was requested to verify the Thai import data against Russian export data from 1991-92. The Embassy was informed by the Statistics Committee that 1992 Russian exports of frozen Pacific salmon to Thailand were 1,226t and that no figures were available for 1991. Russian exports of Pacific salmon may have taken place during late 1991 and not been recorded as Thai imports until 1992. Russian export data for 1991 may help to explain this significant discrepancy. We hope that the authorities in Thailand and Russia will be able to provide further information to NPAFC parties.

MALAYSIAN IMPORTS OF FROZEN SALMONIDAE IN 1992

Malaysia recorded imports of 33t of frozen Pacific salmon in 1992 and 2,945t of "Other salmonidae, frozen", of which 1,569t was imported from New Zealand.

The Canadian High Commission in Wellington was requested to verify the Malaysian import data against New Zealand export data from 1991-92. The High Commission was informed that New Zealand exported 2.8t of whole frozen salmon and 8.9t of chilled whole Pacific salmon to Malaysia in 1992. These are predominantly farmed salmon with the possibility of some ranched salmon. There is no wild salmon exported by New Zealand. New Zealand exported 2,000t of salmon in 1992, most of which was exported to Japan.

SUMMARY OF 1992 PACIFIC SALMON IMPORTS FROM SELECTED ASIAN COUNTRIES

(M.T. - 1992)

Importing Country	Volume	Product Form	Exporting Countries and Respective Export Quantity	
France	622	Canned	Thailand	251
			Malaysia	261
			China	30
			Philippines	80
Netherlands	612	Canned	Thailand	365
			Malaysia	187
			Singapore	16
			China	44
United Kingdom	377	Canned	Thailand	177
			Malaysia	137
			Philippines	32
			South Korea	31
Belgium-Luxembourg	57	Canned	Thailand	49
			Malaysia	8
Spain	8	Frozen	Singapore	2
			China	6
F.R.G.	2	Canned	Malaysia	2
Australia	178	Canned	Thailand	146
			Malaysia	32
	1856			

Source: Eurostat - COMEXT - Totals are rounded and refer to the sum of available data on imports of canned and frozen Pacific salmon. Conversions of product weight to round weight have not been made.

TABLE IITOTAL EC IMPORTS OF SALMON FROM NON-SALMON PRODUCING STATES OF ORIGIN
Quantity - M.T.; Value - '000 ECU

	<u>1991</u>		<u>1992</u>	
	<u>Quantity</u>	<u>Value</u>	<u>Quantity</u>	<u>Value</u>
H.S. 0303.1000 Salmon, Pacific, Frozen				
Singapore	23	40	2	2
China	185	434	6	14
South Korea	60	91	-	-
<u>Subtotal</u>	<u>268</u>	<u>565</u>	<u>8</u>	<u>16</u>
H.S. 1604.1100 Salmon, Whole or Pieces Prepared/Preserved				
Thailand	1,262	3,594	707	1587
Malaysia	325	960	565	1494
China	23	39	56	93
South Korea	71	73	31	65
Taiwan	3	24	-	-
Philippines	-	-	112	164
Singapore	-	-	16	23
Vietnam	-	-	-	1
<u>Subtotal</u>	<u>1,684</u>	<u>4,690</u>	<u>1487</u>	<u>3,427</u>
H.S. 1604.2010 Salmon, Preserved/ Prepared				
Thailand	58	154	135	312
Malaysia	19	58	30	76
China	-	-	12	18
<u>Subtotal</u>	<u>77</u>	<u>212</u>	<u>177</u>	<u>406</u>
<u>Total Product:</u>	<u>2029</u>	<u>5467</u>	<u>1672</u>	<u>3849</u>

Source: Eurostat - COMEXT

TABLE III**MAJOR ASIAN EXPORTERS OF PACIFIC SALMON**

	1991	1992	CHANGE
Thailand	1801 *	1132.5■	-37%
Malaysia	365	639	+75%
Singapore	301	18	-94%
China	1250	80	-94%
ROK	131	31	-76%
Philippines	-	113	+11%
TOTALS	3848	2013.5	-48%

* FAO Export Statistics indicate Thailand exported 1697t of Pacific salmon in 1991.

■ Thailand Export Statistics