

GENERAL REVIEW

Malaysian Fisheries, for statistical purposes, is divided into three main Sub regions, which are:

- (1) Peninsular Malaysia,
- (11) Sabah,
- (111) Sarawak.

The following is a general review of the performance of the fishing industry in these three main sub regions during the year 1977.

(1) PENINSULAR MALAYSIA

(A) CATCH

1. Trend of Catch

Although Peninsular Malaysian fisheries dates a long way back, the watershed in its history was the year 1965 when the trawl was officially introduced into this region. The Pre-1965 period was the era of the fishing stakes and purse seines. The total catch during this period never exceeded the 200,000 tonne level. In the Post-1965 period, purse seines continued in importance, but it was the trawl fishery which became the single most important fishery.

Total catches reached a record high in 1968 which is considered the first peak in the Peninsular Malaysian fisheries. The second peak occurred five years later in 1974 when catches exceeded the 400,000 tonne level. The 1977 catches almost reach the 500,000 tonne level indicating the possibility that this year could be the third peak?

The reasons for the increasing trend in catches in the post-1965 period are:

- a) the introduction of trawling which resulted in the exploitation of a new resource — the demersal resource. Prior to the introduction of trawling the local fisheries were essentially a pelagic fishery.
- b) The introduction of trawling also gave a further impetus to the continued rapid mechanization of fishing boats which increased fishing efficiency.

Trawling was thus the catalyst for the growth in this region's catches since 1965. In 1977 therefore it is not surprising to note that the trawl fishery contributed 52% of the total catch for this region.

2. Catch In 1977

The total catch by fisheries and cultures (excluding Freshwater Fisheries) in 1977 was 497,952 tonnes or an increase of 21.2% (86,984 tonnes) over the previous year. The increase in the 1977 catches is attributed to the increase in trashfish and prawn landings by trawlers; the better catches for the pelagic fisheries; and the increase in cockle production.

The value of the 1977 catch (excluding Freshwater Fisheries) was \$828,493,529 which was 29% more than previous year's value. This increase in value is due to the increase in catches and the rising price of fish.

3. Catch By Fishery Sectors

Marine fisheries landed 451,529 tonnes in 1977 which was 19% (72,203 tonnes) more than the previous year. In terms of value, the 1977 catch was \$810,843,969 which was 27.5% more than the previous year.

Coastal aquaculture of cockles produced 46,423 tonnes in 1977 which was a gain of 46.7% (14,781 tonnes) over the previous year. In terms of value it was \$17,649,560 which was a 35.6% gain over the previous year.

Freshwater fisheries is composed of both capture and culture fisheries. As no proper data is available, it is guestimated that Freshwater fish capture in 1977 was around 20,000 tonnes. Its value in 1977 is also estimated to be \$48,267,600.

The production of Freshwater culture fisheries is also guesstimated to be 8,890 tonnes in 1977 or 5.2% more than the previous year. In terms of value, it is estimated to be about \$14,401,267 in 1977.

4. Catch By Fishing Areas

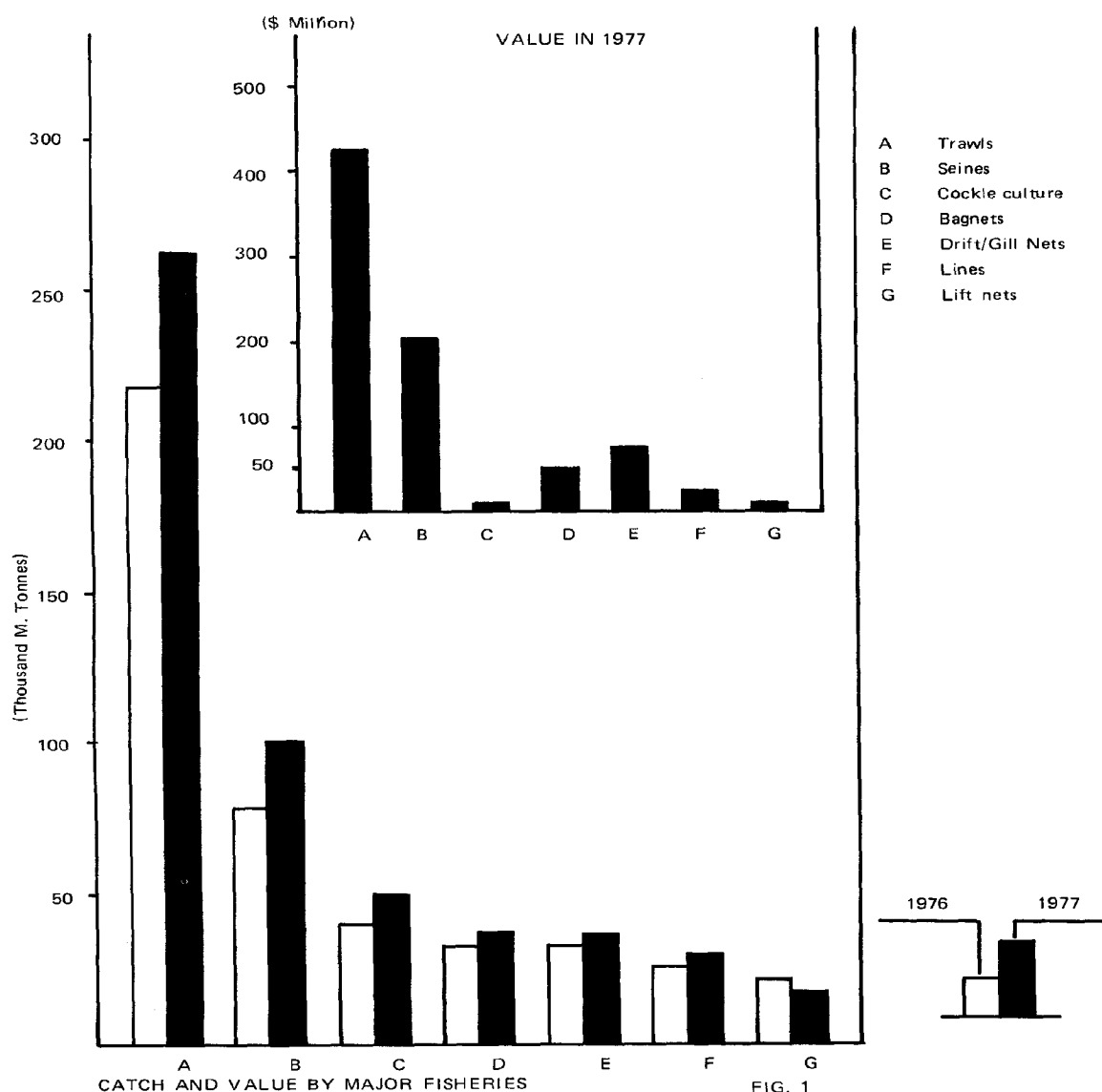
Peninsular Malaysia is divided into two regions: the west coast bordering the Straits of Malacca and the east coast bordering the southwestern part of the South China Sea. Being basically a small scale fishery, much of the fishing activity is concentrated within 60 nautical miles from the coastline.

The total catch from the Straits of Malacca in 1977 was 377,867 tonnes — a gain of 28.3% over the previous year. This water area also accounted for 76% of the total catch in 1977. The value of the catch from this area was \$649,323,910 in 1977.

The catch from the South China Sea area was 120,085 tonnes in 1977 — a gain of 3.2% over the previous year. In terms of value, the South China Sea catch was \$179,169,619.

5. Catch By Major Fisheries

With the exception of the liftnets and fishing stakes, all other fisheries gained in 1977 as compared to the previous year. Coincidentally, the biggest gains were made by the three major fisheries which are: the trawl fishery which gained by 18.3% over the previous year; the seine fishery (mainly purse seines) which gained by 28.4%; and cockle culture which gained by 46.7% over the previous year. (See Fig. 1).



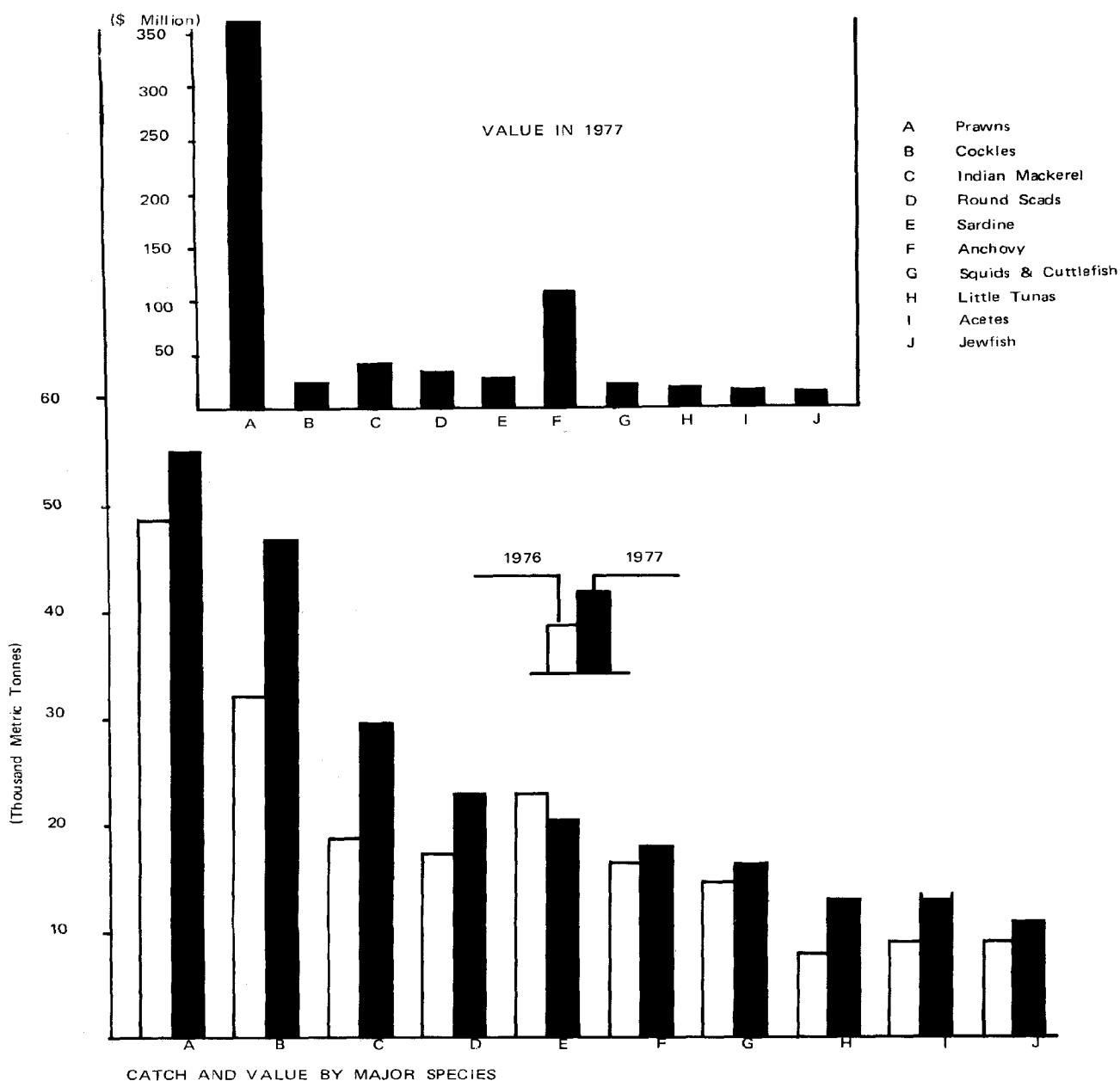


FIG 2

6. Catch By Major Species (See Fig. 2)

The 1977 marine catch or harvest was composed of 362,367 tonnes of fishes, 70,584 tonnes of crustaceans, 62,111 tonnes of Molluscs and 2,890 tonnes of other aquatic animals (Jelly fish).

Although there was a general increase in catches of most species, the fish species which showed a significant increase in 1977 over the previous year were: trash fish; cockles, Indian mackerel, prawns, little tunas and round scads.

On the other hand species which showed a significant decrease in catches in 1977 compared to the previous year were: sardines, hardtail scad and unsorted and unidentified fishes.

Trashfish

Trashfish is mainly composed of inedible fishes and juvenile edible fishes. Since the introduction of trawling, the quantity of trashfish landings have been increasing rapidly. However, the big jump in trashfish landing came in 1972 and since then trashfish is usually the biggest component in the total catch. In 1977 trashfish composed 31% of total catches or 154,995 tonnes, valued at \$17,316,173. Trashfish is mainly landed by trawlers, bagnets, seines and fishing stakes.

The possible reason for this increasing trend in trashfish landings in recent years is the intensified fishing efforts, especially by trawlers, in an already over-exploited fishing ground.

Cockles

The total production of cockles in 1977 was 46,423 tonnes or 9.3% of total catches. The increased harvest in 1977 is probably due to the increased land area under culture in 1976 resulting in a bigger harvest in 1977. The value of cockles harvested in 1977 was \$17,649,560.

Indian Mackerel

Indian mackerel, which is mainly caught by purse seiners and trawlers using the high opening trawl net, landings in 1977 was 28,531 tonnes which was 58% more than the previous year. The catch from the Straits of Malacca was 19,570 tonnes while that from the South China Sea was 8,961 tonnes. This increase was due to the good season for most pelagic species in 1977.

The total value of Indian mackerel in 1977 was \$33,957,000.

Prawns

Prawns, which are found in the inshore waters, is mostly landed by the small or mini trawlers. Prawns constitute the most important species landed by these trawlers because of their price.

Besides the trawlers, the smaller seines and drift/gill nets also land significant quantities of prawns.

The 1977 prawn catches was 54,584 tonnes or an increase of 14.5% over the previous year. The total value of prawns in 1977 was \$360,912,400. The bulk of these prawns were caught in the Malacca Straits (50,987 tonnes). Of lesser importance is the South China Sea where prawns are seasonal. The 1977 catch here was 3,597 tonnes.

Little Tunas

Little tunas, mainly Bonito, Longtail tuna and Eastern little tuna, showed a significant increase in 1977. The total catch in 1977 was 12,446 tonnes or an increase by 97.8% over the previous year. The bulk of these tunas were from the South China Sea totalling 10,102 tonnes, while the remaining 2,344 tonnes came from the Malacca Straits. These tunas were mainly caught by purse seines, lines and drift/gill nets.

The value of the 1977 little tunas landing was \$14,812,560.

Round Scads

The total catch of round scads in 1977 was 21,423 tonnes or 32.8% more than the previous year. Their total value was \$25,496,712.

The bulk of these round scads were caught by the purse seines and to some extent by lift nets. The catches by water areas were: South China Sea — 15,025 tonnes and Malacca Straits — 6,398 tonnes.

Sardines

There was a decrease in sardine catches in 1977 when only 18,415 tonnes was landed. This was a decrease by 13.3% compared to the previous year. The value of sardines caught in 1977 was \$21,916,944. The bulk of sardines were landed by the purse seiners.

Hardtail Scad

There was a decrease in hardtail scad landings in 1977. The 1977 catch was 4,831 tonnes which was 32.2% less than the previous year. Their total value in 1977 was \$5,749,128.

Unsorted And Unidentified Fishes

This group is usually composed of small quantities of the common species that are unsorted on landing and usually they add up to a significant quantity each year. The 1977 catch of this group was 11,659 tonnes which was 18% less than the previous year. Their value was \$13,875,768 in 1977.

(B) FOREIGN TRADE IN FISH AND FISHERIES PRODUCTS

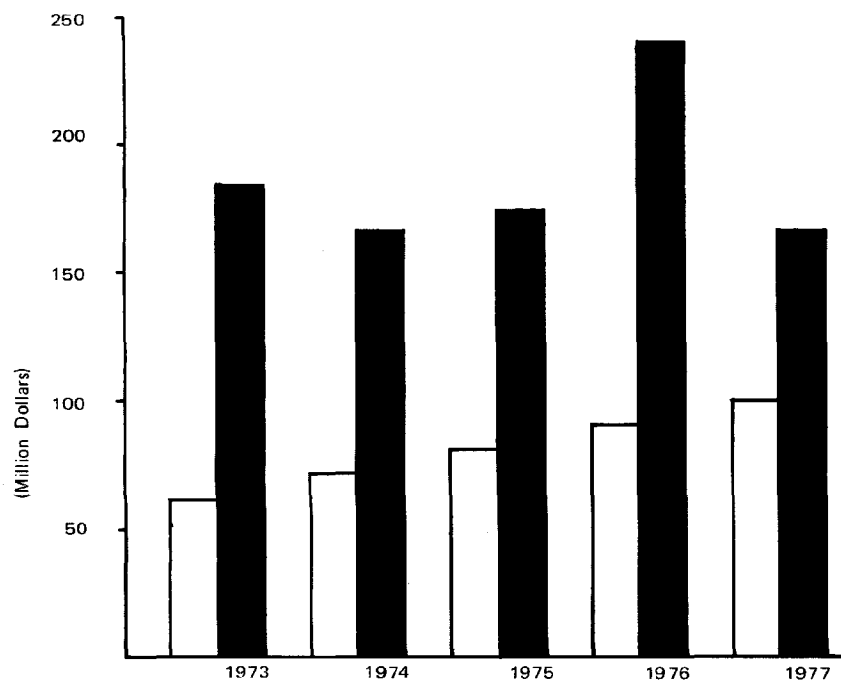


FIG. 3 Value of Foreign Trade in Fisheries

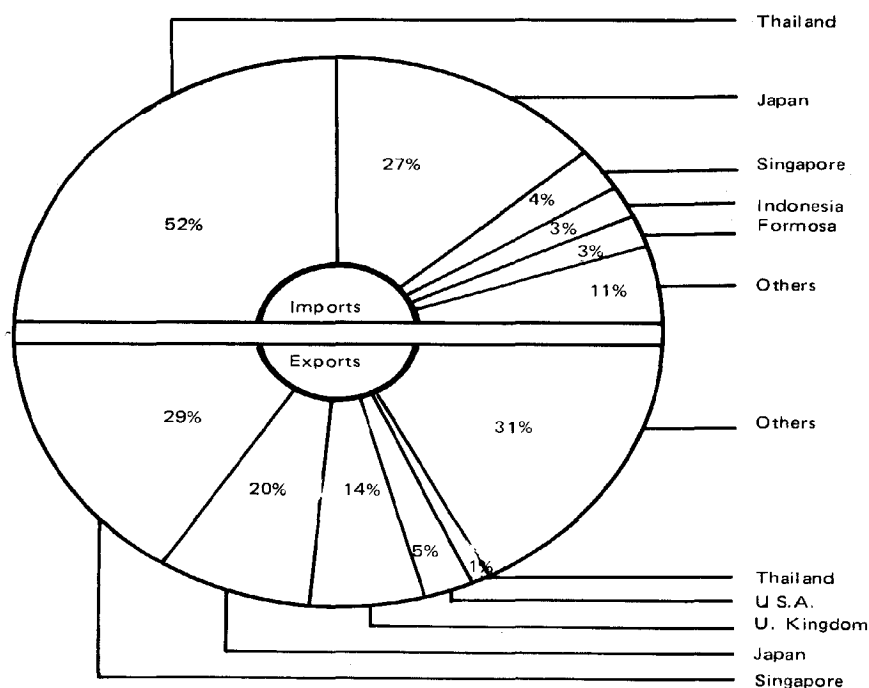
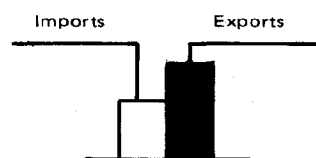


FIG 4: Fish Trade by Countries of Origin and destination in 1977.

The balance of trade in fisheries products has always been in favour of Peninsular Malaysia. For the last five years (Fig. 3), it is seen that although imports have been steadily rising, exports were always in excess of imports. This surplus was mainly because of the export of higher priced fish to mainly Singapore and the export of prawns to mainly Japan, United Kingdom, Singapore and the U.S.A.

Total imports in 1977 were \$95,237,588 while total exports were \$159,697,615, which was a surplus of \$64,460,027.

1. Imports

There has been a steady rise in the volume and value of imports in recent years. This was because domestic supply was inadequate to meet the growing domestic demand. The biggest imports were for human consumption whose value in 1977 was \$86,504,829 which was 5.8% more than the previous year. The most important item was the import of fresh fish and prawns from Thailand. As there was a shortage of supply in the domestic market and also as certain popular species of fish were not available in quantity in local waters, these were then mainly imported from Thailand.

The imports for non-human consumption in 1977 was \$8,732,759. This was mainly the import of fishmeal from Thailand. Domestic demand for fishmeal has been increasing lately, but domestic production is still inadequate, even though domestic trashfish catch is 31% of total catch in 1977. Fishmeal import alone was \$8,358,731 in 1977 or 96% of the total imports for non-human consumption items.

In general, total imports, quantity-wise, rose by 2.4% over the previous year while value-wise, it rose by 8.8%. The major exporting countries to Peninsular Malaysia whose annual value exceeded 10 million dollars in 1977 were Thailand and Japan.

2. Exports

Fishery exports in 1977 was \$159,697,615 which was \$78,368,693 or 32.9% less than the previous year. The export items that showed a significant decrease in 1977 were fresh/frozen prawns, dried/salted fish and molluscs and fresh/frozen/canned tuna.

The exports for human consumption were \$157,697,796 in 1977 which was a decrease by \$78,437,798 or 33.2% compared to the previous year.

However, the export of non-human consumption items increased to \$1,999,819 in 1977. This was a rise of \$69,105 or 3.6% over the previous year. The major importing countries from Peninsular Malaysia in 1977 with a value of more than 10 million dollars were Singapore, Japan and the United Kingdom.

(11) SABAH

A. CATCH

1. Catch In 1977

The catch by Sabah fisheries has been gradually increasing since 1972 with the exception of 1976 when there was a slight decline. The bulk of the catch is caught on the east coast of Sabah facing the Celebes Sea where some of the major fishing centres are located.

The 1977 total catch by fisheries and cultures was 36,200 metric tonnes which is an increase of 14% over the previous year. The value of this catch in 1977 was \$86,370,000 which is an increase of 40% over the previous year.

2. Catch By Fisheries Sectors:

Marine fisheries catch in 1977 was 34,900 tonnes or an increase of 14% over the previous year. The value of this catch was \$82,670,000.

Freshwater fish culture which accounts for less than 4% of total catch produced 1,300 tonnes in 1977 or a rise of 30% over the previous year. The value of the 1977 production was \$3,700,000.

3. Catch By Major Fisheries

Prawn trawling is the only major fisheries in Sabah. The other fisheries are all small-scale traditional fisheries like fishing stakes, gill nets and lines. There are also a handful of Peninsular Malaysian purse seiners operating here.

The prawn trawlers landed about 16% of the total catch in 1977 quantity-wise while value-wise they accounted for more than 34% of the total catch value.

Prawn trawling being an important fishery here landed about 85% of the total prawn catches in 1977.

Most of the major prawn trawlers bases are on the east coast in the Sandakan and Tawau residencies. These trawlers are about 30–50 gross tons and are considered reasonably big and modern by Malaysian standards. These trawlers operate about 3 or 4 trips in a month and the main prawn fishing grounds are at Marudu Bay, Labuk Bay and off the Semporna coast on the east coast. Brunei Bay on the west coast is also an important prawn ground but most of the gears operating here are small prawn gill netters.

4. Catch By Major Species

The 1977 catch was composed of 29,100 tonnes of fishes, 6,000 tonnes of crustaceans, 600 tonnes of molluscs and 500 tonnes of other aquatic plants and animals like Beche-de-mer, sea-urchins, pearls etc.

Species groups which showed an increase in 1977 over the previous year were the freshwater fishes; red fishes, basses, congers etc; jacks, mullets etc; tunas, bonitos, skipjacks; mackerels, bill-fishes etc; and prawns.

Species groups that showed a decrease in 1977 compared to the previous year were shads, milk-fishes etc; flounders, soles etc; herrings, sardines, anchovies etc; sharks and rays; slipmouths and unsorted and unidentified fishes.

The following species groups showed significant change in 1977 compared to the previous year.

Red Fishes, Basses, Congers etc.

The 1977 catch of red fishes, basses and congers were 6,500 tonnes which was a rise of 44% over the previous year. In terms of value their value in 1977 was \$11,780,000 which was an increase of 45% over the previous year.

Jacks And Mulletts

The 1977 catch of jacks and mullets was 7,900 tonnes or a rise of 147% over the previous year. In terms of value the 1977 catch value was \$17,100,000 or a 148% increase over the previous year.

Mackerels, Bill-fishes etc.

This group showed a big increase from 2,000 tonnes in 1976 to 7,400 tonnes in 1977 — an increase by 270%.

Their 1977 value was \$15,700,000 which was a 272% rise in value over the previous year.

Slipmouths

Slipmouths showed a big decrease in 1977. The 1977 catch of 400 tonnes was a 87% decrease compared to 1976. Value wise the 1977 catch value was only \$240,000 or a drop of 86% under the previous year.

B. FOREIGN TRADE IN FISH AND FISHERIES PRODUCTS

Total fisheries imports in 1977 were 4,021.40 long tons valued at \$10,245,153, while fisheries exports were 5,635.35 long tons valued at \$36,267,463.

The surplus balance of trade in 1977 of 1,613.95 long tons was valued at \$26,022,310.

The main imports in 1977 were canned fish, especially canned sardines and horse mackerels. The total value of canned fish imports were \$6,138,650 or about 60% of total imports.

The main exports were frozen prawns (\$29,952,701), salted molluscs (\$3,600,324) and fresh/chilled/frozen freshwater fishes (\$1,553,809). Prawns alone accounted for 83% of total export value in 1977.

(111) SARAWAK

A. CATCH

1. Catch In 1977

Sarawak's marine catches have been increasing since 1972. The 1977 catch was 83,295 metric tonnes which is about 14% more than the previous year.

2. Catch By Major Fisheries

The major fisheries in Sarawak are the trawl fishery, the gill/drift net fishery and the scoop/push/lift net fishery.

With the exception of the gill/drift net fishery, the other two fisheries showed an increase in catches in 1977.

The trawl fishery landed 45,583 tonnes in 1977 which is a 4% increase over the previous year. In terms of total catches in 1977, the trawl fishery accounted for about 55% of total catches. Most of these trawlers are prawn trawlers while the rest are fish trawlers.

The gill/drift net fishery landed 15,239 tonnes in 1977 which was a decrease of 27% compared to the previous year. In terms of total catches, this fishery landed more than 18% of the total catch in 1977.

The scoop/push/lift net fishery landed 13,720 tonnes in 1977 which was a 558% increase over the previous year. In terms of total catches this fishery accounted for 16.5% of total catches in 1977. The major species caught by this fishery was jelly fish.

3. Catch By Major Species

The 1977 catch composed of 55,998 tonnes of fishes, 10,177 tonnes of crustaceans, 1,080 tonnes of molluscs and 16,040 tonnes of jelly fish.

The species varieties found in Sarawak waters is similar to those in Peninsular Malaysian waters and in 1977 there has been a general increase in catches of most species compared to last year.

However, the most important species are as follows:

Jelly Fish

The jelly fish, which a few years ago had no value, today has become a very profitable species due to the demand by Japanese importers. Jelly fish processing sheds are a common feature in most fishing centres here.

Jelly fish catch in 1977 was 16,040 tonnes compared to 1,423 tonnes in 1976. This is a rise of 1027%!

Trash Fish

Trashfish is mainly caught by trawlers and their 1977 landing of trashfish was 12,480 tonnes which is a rise of 4% compared to last year.

Unsorted And Unidentified Fishes

The 1977 catch of this group was 10,473 tonnes which is a decrease of 29% compared to last year. This decrease could be due to better sorting of species by fishing crews.

Prawns

Prawns catches, mainly by trawlers, in 1977 was 9,483 tonnes which is a decrease of more than 8% compared to the previous year.

B. FOREIGN TRADE IN FISH AND FISHERIES PRODUCTS

Total imports into Sarawak in 1977 were 2,158.95 long tons valued at \$4,596,550. Compared to