

STATUS OF FISHERIES SECTOR IN MALAYSIA 1984

1. General

The important developments of the fisheries sector in 1984 are: reduced landings of marine fish, increased imports in value and decreased exports in value. With regards to the presentation of data, as from this year cockle production data has been transferred to the aquaculture section.

2. Fishing Boats

2.1 There were 41,079 licensed fishing boats in Malaysia, that is an increase of 2.3% over that of the previous year. The distribution was as follows: 25,673 (62.5%) in Peninsular Malaysia, 6,500 (15.8%) in Sabah and 8,906 (21.7%) Sarawak. The increases were from Sarawak and Sabah which licensed additional boats by 9.0% and 3.2% respectively. In Peninsular Malaysia, there was a slight decrease of about 0.1% due to the decrease in number of boats.

In terms of composition, the most number was that of the inboard engine-powered boats (64.4%), followed by outboard engine-powered boats (29.0%) and non-powered boats (6.6%). (Refer to chart A). Large proportion of the inboard engine-powered boats were in the category of 0 - 9.9 GRT (some 60.3%). Table I shows the total number of licensed fishing boats in Malaysia.

Table I- Number Of Licensed Fishing Boats In Malaysia
- 1983 And 1984

States	Number		% Change	
	1983	1984	1983	1984
Peninsular Malaysia	25,695	25,673	- 17.4	- 0.1
Sarawak	8,173	8,906	+ 4.1	+ 9.0
Sabah	6,300	6,500	+ 6.1	+ 3.2
Total:	40,168	41,079	- 3.2	+ 2.3

3. Fishing Gears

3.1 There were 37,975 units of fishing gears licensed in Malaysia. It is 8.4% less than the number of units licensed in the previous year. The situation is a result of less licences issued for trawl gears and purse seine nets in Peninsular Malaysia. The number of trawl and fish purse seine licences issued decreased by 3.4% and 15.1% respectively. It reflected the determination of the government to reduce fishing efforts to conserve resources and distribute catches more equally.

3.2 The main gears in Peninsular Malaysia were the trawl and drift nets. Together they comprised 67.1% of the total gears licensed. Similar situation was also seen

in Sarawak and Sabah where the trawl and drift nets combined formed about 65.2% and 34.2% of the total respectively.

4. Employment

4.1 In 1984 there were 109,087 fishermen in the fishing sector, that is an increase of about 1.7% over that of the previous year. Out of the total, 70.0% were in Peninsular Malaysia, 11.8% in Sarawak and 18.2% in Sabah. The fishermen formed some 2.0% of the total labour force in Malaysia.

4.2 The largest increase was in Sarawak, that is by 8.8%. In Peninsular Malaysia, on the other hand, the number has decreased by a small proportion (0.1%). In Sabah the number remained constant. There were less number of fishermen in Peninsular Malaysia because of the steps taken by government to reduce the number of surplus fishing boats and thus the number of fishermen.

4.3 In terms of ethnic distributions, there were some 48,616 (or 63.7%) of Malay origins, 25,077 (32.8%) of Chinese origins and 2,675 (3.5%) of Indian, Thais, Aborigines and Other origins. Some 55.7% of the Malay fishermen were found in the East Coast of Peninsular

Malaysia, whilst 92.3% of the Chinese fishermen were found in the West Coast of Peninsular Malaysia.

4.4 Large proportion of the fishermen in Peninsular Malaysia worked on drift net boats (39.6%), trawl boats (18.3%) and fish purse seine boats (13.7%). Table 2 shows the distribution of fishermen in Malaysia.

Table 2 - Distribution Of Fishermen Working On
Licensed Fishing Boats - 1983 & 1984

States	Number		% Of Change	
	1983	1984	1983	1984
Peninsular Malaysia	75,590	76,368	- 5.8	+ 1.0
Sarawak	11,783	12,819	- 3.0	+ 8.8
Sabah	19,900	19,900	+ 0.3	0
Total:	107,273	109,087	- 4.4	+ 1.7

5. Marine Landings

5.1 The marine landings in Peninsular Malaysia was reduced by 15.6% in 1984, to 481,641 metric tonnes. At the same time, there was also a reduction of 17.7% in the wholesale value of catch, to \$1.1 billion.

5.2 The reduction in landings reflected the lesser catch of the main fisheries, that is that of the trawl and the seine nets, both in the West Coast and East Coast of Peninsular Malaysia. The quantity of catch of the trawl nets and seine nets decreased by 15.7% and 9.9% respectively. The landings of demersal and pelagic fish decreased by 19.1% and 13.3%, to 178,024 metric tonnes and 224,472 metric tonnes respectively.

5.3 The reduction in the wholesale value of the marine fish was due to the decrease in the landings of the high value species. As an example, the composition of grade one fish was reduced from 10.8% (in 1983) to 8.5% of the total catch of Peninsular Malaysia i.e from 59,956 metric tonnes to 40,921 metric tonnes. Likewise, the composition of prawns was reduced from 9.3% to 8.6% i.e from 52,953 metric tonnes to 41,389 metric tonnes. The single most important fish caught was Rastrelliger, at 85,184 metric tonnes, an increase of about 36.1% over that of 1983. Table 3 shows the quantity and wholesale value of marine fishes landed in Peninsular Malaysia in 1983 and 1984.

Table 3 - Quantity And Wholesale Value of
Marine Fish Landings - 1983 And 1984

	Quantity/Value		Change %	
	1983	1984	1983	1984
A. Quantity (Metric Tonnes)*				
Peninsular Malaysia	570,525	481,641	+ 10.2	- 15.6
West Coast	403,997	347,744	+ 5.0	- 13.9
East Coast	166,528	133,897	+ 25.0	- 19.6
B. Wholesale Value (\$ million)				
Peninsular Malaysia	1,286	1,059	+ 6.0	- 17.7
West Coast	958	805	+ 0.2	- 16.0
East Coast	328	254	+ 27.1	- 22.6

* - Excluding cockles landings.

5.4 The West Coast contributed about 72.2% of the total landings in Peninsular Malaysia. The region experienced a reduction in the total landings of fish by 13.9% over that of the previous year. The average landings in the West Coast over the last 5 years was 440,049 metric tonnes which already exceeded the calculated Maximum Sustainable Yield of 365,892 metric tonnes.

5.5 The East Coast of Peninsular Malaysia also experienced a decline in landings by 19.6% (to 133,897 metric tonnes) as compared to the previous year. In 1984 the landings of most of the important fisheries declined, except trawlers and bag nets. As an example the landings of seine nets was reduced by 25.3% and that of the gill nets by 34.2%. At the same time there was a reduction of 22.6% in the wholesale value of fish (to \$254 million). Some 36.2% of the landings in the East Coast were made by the purse seines. However its landings fell by 20% over that of 1983. The average total landings in the East Coast was some 183,135 metric tonnes which is below the Maximum Sustainable Yield of 417,029 metric tonnes.

5.6 Data on the fisheries sector of Sarawak and Sabah is limited and therefore detailed analysis is not attempted. Table 4 shows the quantity of marine landings in 1983 and 1984.

Table 4 - Marine Landings In Sarawak And Sabah
- 1983 And 1984

Area	Quantity (Metric Tonnes)		Change In %	
	1983	1984	1983	1984
Sarawak	70,438	68,632	+ 1.6	- 2.6
Sabah	45,500	50,200	+14.3	+10.3
Total:	115,938	118,832	+ 6.2	+ 2.5

5.6.1 Having experienced an increase in marine landings for 2 consecutive years, Sarawak's landings in 1984 was reduced by 2.6% (to 68,632 metric tonnes). Much of the reduction was from the drift and barrier nets, by 23.5% and 58% respectively. The landings of the other main gears did not show any significant change. The total known resource potential is 289,000 metric tonnes.

5.6.2 The marine landings of Sabah increased to 50,200 metric tonnes in 1984 (an increase of about 10.3%). A large part of the landings was "finfishes" at 36,700 metric tonnes (73.1%) and the balance was crustaceans at 11,500 metric tonnes (22.9%), molluscs at 1,300 metric tonnes (2.6%) and other aquatics products at 700 metric tonnes (1.4%).

The value of the marine landings was \$166.3 million (an increase of 6%). The value of crustaceans formed about 51% of this value. Other important types were in the groups "redfishes, basses, congers etc."

(total 15.6%); "jack, mullets etc." (total 14.4%) and "mackerels, bill fishes, etc." (total 7.2%). The calculated total Maximum Sustainable Yield is 119,000 metric tonnes.

6. Exports/Imports Of Fishery Commodities

6.1 The export value of fishery commodities in 1984 was \$300 million, i.e. about 0.8% of the total exports of Malaysia. The breakdown is as follows: \$186 million from Peninsular Malaysia, \$26 million from Sarawak and \$88 million from Sabah. There was a reduction of 16.2% in the total over that of last year. The biggest reduction was experienced by Peninsular Malaysia, by 23.5%. In terms of total quantity of exports, it increased by 8.2%, to 136,808 metric tonnes.

6.2 The value and quantity of imports increased, as in previous years. The value and quantity of imports was increased by 24.3% and 32.7% to \$317 million and 237,343 metric tonnes respectively. The import balance in terms of value and quantity was 5.4% and 42.4% respectively. Table 5 shows the exports and imports status.

Table 5: Quantity And Value Of Exports And Imports
Of Fishery Commodities - 1983 And 1984

Exports/ Imports	Quantity (Metric Tonnes)		Change In Quantity (%)		Value (\$ Million)		Change In Value (%)	
	1983	1984	1983	1984	1983	1984	1983	1984
Peninsular Malaysia								
Exports	117,335	127,122	- 11.0	+ 8.3	243	186	+ 8.0	-23.5
Imports	162,050	216,710	- 4.3	+ 33.7	206	260	+ 4.6	+26.2
Sarawak								
Exports	3,177	2,817	+ 27.1	- 11.3	29	26	+ 15.9	-10.3
Imports	7,422	10,370	- 15.9	+ 39.7	25	32	- 12.3	+28.0
Sabah								
Exports	5,899	6,869	+ 39.8	+ 16.4	86	88	+ 51.6	+ 2.3
Imports	9,369	10,263	+ 21.5	+ 9.5	24	25	+ 7.3	+ 4.2
Total								
Exports	126,411	136,808	- 8.8	+ 8.2	358	300	+ 16.6	-16.2
Imports	178,841	237,343	- 3.8	+ 32.7	255	317	+ 2.8	+24.3

6.3 The decrease in the value of fishery commodities exported was due to the fall in the price of the main export items. As an example, the value per ton of "fresh, frozen and chilled" fish was reduced from \$633 in 1983 to \$467 in 1984. Likewise in the case of "fresh, frozen and chilled crustaceans and molluscs", it was down from \$2,096 to \$1,062 in the same period.

6.4 Singapore was the main country importing fishery commodities from Peninsular Malaysia i.e 20.3% and

64.3% of the total export value and quantity respectively. Other countries were Australia (19.6% and 3.1%), U.S.A (11.7% and 2.0%) and Japan (8.4% and 1.5%). The group "crustaceans and molluscs" formed the main export items i.e 68.0% and 49.7% of the total export value and quantity respectively. Table 6 shows the 5 main fishery commodities exported in term of value and quantity.

Table 6: Five Main Exports Of Fishery Commodities
In Terms Of Quantity And Value (Peninsular Malaysia)
In 1984

Types Of Commodities	Quantity		Value	
	Metric Tonnes	%	\$ Million	%
Fish: Fresh, chilled or frozen	44,339	34.9	20.72	11.1
Crustaceans & Molluscs: Fresh, chilled, frozen, dried & salted	41,210	32.4	43.77	23.5
Prepared Or Preserved Fish In Airtight Containers	6,258	4.9	26.49	14.2
Prepared Or Preserved Crustaceans & Molluscs In Airtight Containers	6,937	5.5	36.04	19.3
Prepared Or Preserved Crustaceans & Molluscs Not In Airtight Containers	4,343	3.4	46.03	24.7

6.5 There was an increase of 32.7% in the quantity of fishery commodities imported. There was also an increase of 24.3% in the value of imports. However there was a decrease in the average price of imports. As an example the average price of "fresh, chilled or frozen" fish imported was reduced from \$943 in 1983 to \$878 in 1984. Likewise, the price of crustaceans and molluscs imported in "fresh, chilled or frozen" form was reduced from \$1,939 in 1983 to \$1,708 in 1984. Peninsular Malaysia still imported largely from Thailand, i.e by some 50.9% and 75.7% of the total import value and quantity respectively. Table 7 shows five main import items.

Table 7: Five Main Imports Of Fishery Commodities
In Terms Of Quantity Value (Peninsular Malaysia)
In 1984

Types Of Commodities	Quantity		Value	
	Metric Tonnes	%	\$ Million	%
Fish: Fresh, Chilled or Frozen	108,399	50.0	95.12	36.6
Crustaceans & Molluscs: Fresh, Chilled, Frozen, Dried, Salted In Brine Or Simply Boiled	21,702	10.0	37.07	14.3
Prepared Or Preserved Fish In Airtight Containers	18,481	8.5	46.98	18.1
Prepared Or Preserved Crustaceans And Molluscs In Airtight Containers	5,574	2.6	12.3	4.7
Flour & Meals Of Fish, Crustaceans or Molluscs Unfit For Human Consumption	52,497	24.2	49.24	19.0

7. Aquaculture

Notes:

Data on the aquaculture of Sabah and Sarawak was very limited. The following analysis was referred to data of Peninsular Malaysia only. For first time the write up on cockles is included in this section.

7.1 In 1984 there were 18,342 units of ponds and old mining pools used for aquaculture purposes, with a total area of 4,950 ha. The figure shows an increase of 2.4% in total units and a reduction

of 8.0% in total area. There were also 5,558 units of cages with a total water area of 51,572 sq. meter, which was an increase of 7.3% and 17.3% in total units and area respectively. There were 160 units of cockle farms, occupying a total area of 3,699 ha. Although there was an increase in the total units of ponds and cages under operation, the number of aquaculturists was reduced by 2% to 13,218 persons. This reflected the trend in the management of aquaculture practice towards one of commercial scale with optimization of inputs and labour.

- 7.2 In 1984, there was a significant increase in the aquaculture production. The total production was estimated at 67,482 metric tonnes with a total value of \$45 million. The increase was largely due to a greater contribution of brackishwater production, especially that of cockles, from 38,530 metric tonnes in 1983 to 63,581 metric tonnes in 1984. However, freshwater production was reduced by 67.3% to 3,912 metric tonnes. Table 8 shows the aquaculture productions in Peninsular Malaysia.

Table 8: Estimates Of Aquaculture Productions
In Peninsular Malaysia, 1983 And 1984

Types	Production (Metric Tonnes)		Percentage Increase %	
	1983	1984	1983	1984
Freshwater	11,950	3,913	- 15.4	- 67.3
Brackishwater:				
Cockles	38,530	63,581	- 22.1	+ 65.0
Others	960	167*	+ 29.9	- 82.6
Total:	51,440	67,661	+ 2.5	+ 31.5

* - Excluding commercial production

- Transferred from marine production for comparison purposes.

7.3 There were several factors contributing to the reduction in the freshwater productions. Primarily, the difference is due to the new method of obtaining direct production figures from the farmers. Previously, it was estimated based on acreage supposed to be in operation which was found to be not accurate. However the new method can be improved in terms of coverage etc so as to also include commercial farms. It was noticed that there was a reduction in the demand of fish and prawn fry by 24.7% to 3.62 million in 1984. At the same time, some 448 dugged up ponds and 785 ha. of old mining pools ceased operation in 1984. Another factor was

the change in the management technique. There was a delay in the release of fish fry in the ponds or cages thus the harvesting could only be done in the following year. The information from the commercial sector is also very limited. Efforts are being made to include the commercial production which are becoming significant.

7.4 The largest aquaculture production was cockles (63,581 metric tonnes), Grass Carp (1,707 metric tonnes), Big Head Carp (843 metric tonnes) and Lampam Jawa (756 metric tonnes).

7.5 The production of fish and prawn fry by the government and private hatcheries was reduced by 17.7% and 44.0% respectively over that of the previous year. It was largely due to the reduced demand by the export market and fish farmers (as a result of termination of the subsidy scheme). Nevertheless, the distribution of fish fry for miscellaneous purpose and stocking in open and impounded waters increased by 14 folds to 1.4 million as compared to the previous year.