

Survey and Information Collection on Surimi Industry and catch data in Myanmar from 26 February – 5 March 2006

The mission is aim to evaluate the present status of surimi industry and potential of fisheries resources of some economically important species as surimi raw materials in Myanmar

1. Member of the mission

- | | |
|-----------------------------|---|
| - Dr. Somboon Siriraksophon | Project leader |
| - Dr. Yoshinobu Konishi | Duperty Chief, MFRDMD |
| - Mr. Norman Kok Tiong Ngei | Senior Research Officer, MFRD |
| - Ms. Penjan Laongmanee | Head, Spatial Information Technology Unit, TD |
| - Mr. Myint Pe | Project coordinator from DOF Myanmar |

2. Schedule

- | | |
|-----------------|--|
| 26 Feb 06 (Sun) | - Arrived Yangon
- Discussed with Mr. Myint Pe for the survey schedule
- Contacted travel agent for air ticket to Myeik |
| 27 Feb 06 (Mon) | - Discuss with Mr. Hla Win, Advisor, Department of Fishery for overview of fishery in Myanmar
- Visited Ahlon fishing port (DOF fishing port)
- Visited Marine Fishery Resources Survey and Research Unit and discussed with Mr. Myint Pe for fishery resource data collection system
- Visited Marine Fishery Federation (MFF) and discuss on the surimi industry in Yangon |
| 28 Feb 06 (Tue) | - Dr. Somboon leave for Bangkok
- Visited Nyanung Fishing port (Anawar Fisheries Holding Company)
- Discussed with fishery officer of Yangon Division for the Fish landing data collection system
- Visited Pylonechatha Trading Co.,Ltd (Surimi plant) |
| 1 Mar 06 (Wed) | - Leaved Yangon for Myeik
- Discussed with Mr. Tun Win, Taninthary Divinsional Fishery Officer for the purpose of visit Myeik
- Mr. Tun Win presented overview of fishery status in Taninthary division
- Visited Myiek University, Discussed with Dr. Htay Aung for the overview of fisheries resources in Taninthary Division |
| 2 Mar 06 (Thu) | - Visit Pyi Phyo Tun International Co., Ltd (Surimi plant)
- Visit A.S.K. Andaman Limited (Surimi plant) |
| 3 Mar 06 (Fri) | - Visit Mascot Industries Co., Ltd (Fishing port and raw material supply for A.S.K. Andaman Limited)
- Visit fishery check point of Taninthary Division at Myanmar International Fish Market discuss on the type of fishing boat and number of fishing boat in Taninthary Division
- Visit local fishing port
- Visit lobster and mantis shrimp export company |

- 4 Mar 06 (Sat) - Visit local fishing port
- Discuss outcome of survey in Myeik with Mr. Tun Win
- 5 Mar 06 (Sun) - Leave Yangon

3. Questionnaire

Following the objective of the trip that to evaluate the present status of surimi industry and potential of fisheries resources of some economically important species as surimi raw materials in Myanmar, two questionnaire was develop, country survey form and surimi plant survey form (see annex I and II). The surimi plant survey form was send to 4 companies Pylonechantha Trading Co.,Ltd, A.S.K. Andaman Limited, Min Zar Ni Co., Ltd, and Pearl Sea Co.,Ltd. Mr. Myint Pe project coordinator from DOF Myanmar will collect back all questionnaire and send questionnaire to General light Co.,Ltd (We didn't visit this plant)

4. Local surimi consumption

Limited local consumption for surimi base product. Local people mostly consume fresh, dry or salted fish. The surimi base product such as fish ball, imitation crab stick, etc in the local market and supermarket are imported from Thailand. However Pylonechantha Trading Co., Ltd is developing surimi base product for local consumer.



Fig. 1 Surimi base product develop by Pylonechantha Trading Co., Ltd



Fig. 2 Surimi base product in local market

5. Fishery data collection by Marine Fishery Resources Survey and Research Unit, Department of Fisheries

Department of fishery, Myanmar divided sea area along coastline to be four fishing ground for management purpose. Each fishing ground responsible by difference DOF office.

1. Rakhine fishing ground
2. Ayeyawaddy fishing ground
3. Mon fishing ground
4. Tanintharyi fishing ground

Up to 1995 department of fishery send two officers (from Yangon and Myiek) on board fishing boat to collect fishing position, CPUE and species composition during pre and post monsoon for the Ayeyawadey and Taninthary fishing ground. And about 12 fishing boat from Yangon will send catch record to fishery officer. However, these systematic fisheries data collections had stopped because of the budget constrain.

For this reason, the project supports some budget for data collection of the Marine Fishery Resources Survey and Research Unit for the year 2006. Mr. Myint Pe is contact person.

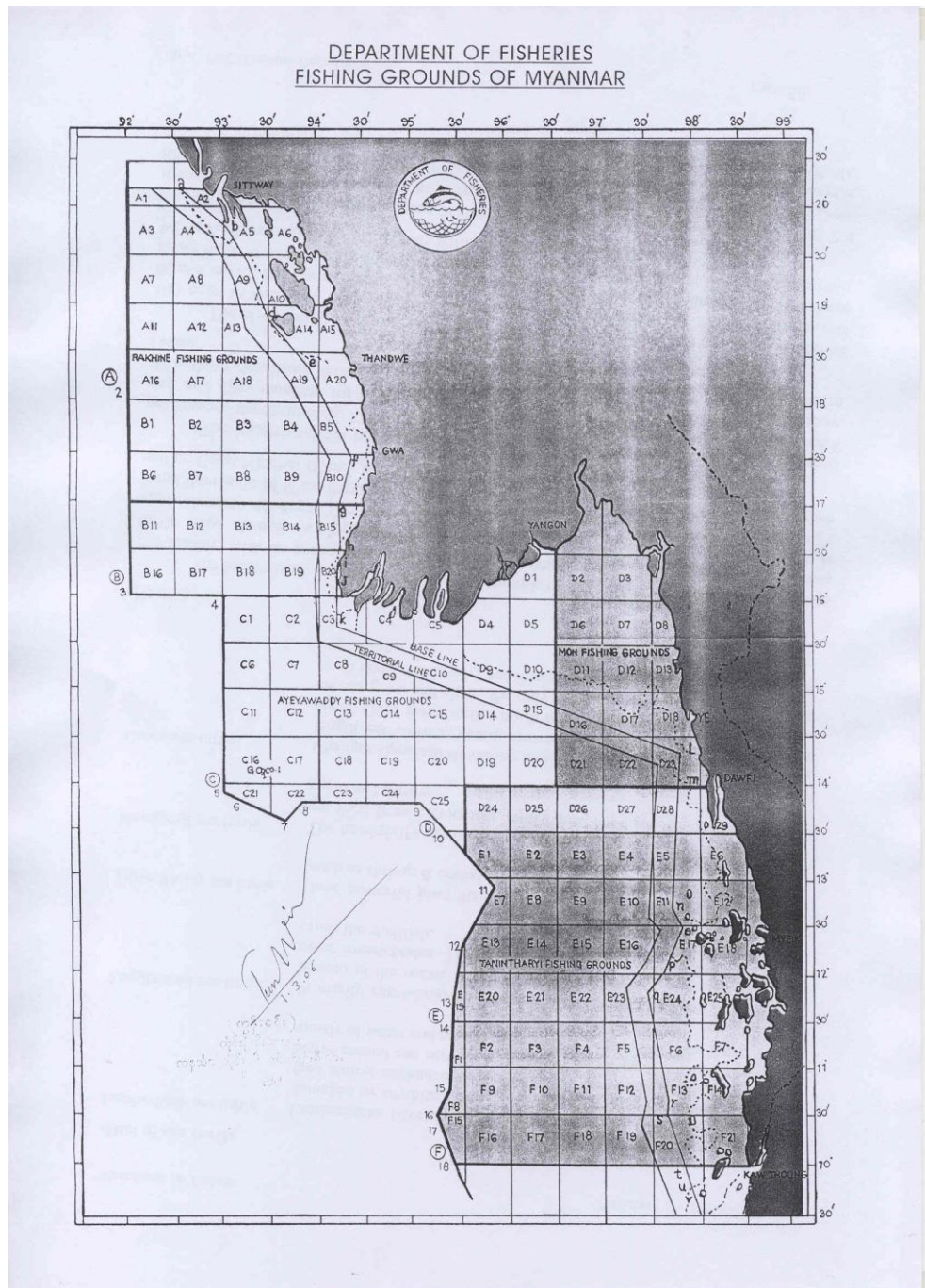


Fig.3 Fishing ground of Myanmar map

6. Fishing landing data and fishing license

Department of fishery, Myanmar started fishing landing data collection since 2003. This is to collect total catch and catch by type that comprise with fish, shrimp and trash. Further more catch from three selected fishing boat of each fishing ground were sampling for species composition. From this survey, we receive some landing data from Divisional Fishery Officer, Tanintharyi Division (Annex III) and Yangon division. However, Almost of data are in Myanmar language, therefore Mr. Myint will translate and send to working team later.

All offshore fishing boat in Myanmar has to pay for the license. They can operate only their license fishing ground. Since the Mon fishing ground is small therefore it was combined with Ayeyawaddy fishing ground license. There is natural close season by monsoon for Rakhine fishing ground, Ayeyawaddy fishing ground and Mon fishing ground in June, July and August while in Tanintharyi fishing ground, fishing boat can operate all year round because fishing ground was protected from monsoon by more than 800 islands along the coast.



Fig. 4 Discussion with Yangon divisional fishery officer (Mr. Hla Win and) Mr. Nyunt Win and manager of Anawar Fisheries Holding Co., Ltd, Nyanung Dan Jetty (Mr. Soe Naing)

7. Visit Anawar Fisheries Holding Co., Ltd.

The company provides fishing port service at Nyanung Dan Jetty. There are 200 fishing boat members. 95% is bottom trawler, the others is stow net. Size of fishing boat is between 60-120 GT with mostly about 100 GT.



About 10% of total landing of this port is surimi raw material. Price of fish in this port base on two systems: Auction price and fix price (change monthly). The company has recorded of total landing and main species composition of each fishing boat. All data was sent to divisional fishery officer in Yangon.

Fig. 5 At Nyanung Dan Jetty

8. Overview of fishery in Tanintharyi Division, Myeik



The overview of fishery in Tanintharyi Division was prepared and kindly presented for SEAFDEC team by Mr. Tun Win. Mainly data was collected during April 2005 – January 2006.

Fig. 6 Mr. Tun Win, Divisional Fishery Officer, Tanintharyi Division presenting overview of fishery in Tanintharyi division

➤ Number of boat

Type	Number
Off shore fishing boat	446
Inshore fishing boat	11180
By district	
- Myeik	5261
- Dawei	2689
- Kawthaung	4230
Offshore carrier boat	66
Foreign carrier boat	39
Local carrier boat	27

➤ Number of fisherman

Offshore	8064
Inshore	28642

➤ Foreign fishing boat

Currently, only one Thai company, Siam Jonathan Co.,Ltd., got fishing right license for fishing in Myanmar water. Totally there are 167 license (license fee 11.13 million USD). These fishing boats are operating in three fishing ground.

Fishing ground	No. of fishing license	No. of trip	Catch (Ton)
Rakhine	5	48	2877
Ayeyawaddy	23	44	2586
Tanintharyi	68	1499	71863.4
Total	96	1591	77326.4

* Data from Apr – Dec 05

➤ Fishery industry

Processing	17
Ice plant	43
Fishmeal	7

➤ Export information

	Ton	Value(million USD)
Fresh	74979.02	42.88
Finished product	9122	14.56

➤ Aquaculture production

	Company	Ton	Value (million USD)
Soft shell crab culture (Apr 05- Jan 06)	P.P.T Co., Ltd	66.29	0.16
	K.K. Co., Ltd	453	1.04
	Total	519.29	1.20
Grouper (Apr 05-Jan 06)	P.P.T Co.,Ltd	9.07	0.072
	Myanmar-China	4.38	?
Shrimp farm (Feb 05-Jan 06)	DOF pilot project	50.80	?

9. Profile of visited company

Pyilonechantha Trading Co.,Ltd

Location: Industrial Zone (3) Yangon
Contact address: No. 160, U Tun Nyo Street, Industrial Zone (3), Shwepyitha Township, Yongon, Myanmar
 Tel: 09-514-7012 Fax: 09-512-28292
 E-mail: pyilonechantha@mptmail.net.mm
Business: Surimi plant and Cold storage
Production capacity: 10 ton/day
General production: 7-8 ton/day
Constrain:
Surimi machine brand: Takamasa Co.,Ltd
Export of surimi: Japan
Raw material: From 5 fishing port in Yangon

The company was established in 1993. The surimi plant and cold storage was started in 1994 producing 4-5 metric tons of surimi /day at Ahlone Township. In 2004 the company invested new factory in Shwepyitha Industrial Zone (3) with new cold storage facility and surimi machine with production capacity of 10 metric tons of surimi per day.

Export of frozen surimi of Pyilonechantha Trading Co.,Ltd

Year	Production (MT)	Export Quantity (MT)
2000	850	820
2001	768	768
2002	1141	1094
2003	1240	1176
2004	931	970
2005 (up to 16 Jan 06)	1520	1473

A.S.K. Andaman Limited

Location: Myeik
Contact address: A.S.K. Andaman Limited (Surimi plant and cold storage)
Yangon Office: 11-A, Thanlwin Road, Kamayut Township,
Yongon, Myanmar
Tel: 951-505-535/707-232 Fax: 951-501-785/505-464
E-mail: gpa-aska@myanmar.com.mm
Business: Surimi and Fishmeal
Production capacity: 10 ton/ day
General production: 5 ton/ day
Constraint: Raw material supply
Surimi machine brand: Takamasa Co.,Ltd
Export of Surimi: Japan and Malaysia (to Seapack Food Sdn Bhd in Penang)
Raw material: From Mascot Industries Co.Ltd which operate 10 trawlers and
bye from other fishing boat.

The company was established in 2003 by the joint venture between Texchem Group Food Division with Mascot Industries Co., Ltd in Myanmar. ASK manufactures and markets surimi and fishmeal products and provides Seapack Food Sdn Bhd, which a company under Texchem's Food Division produces and markets surimi-based product, with a reliable supply of reasonable priced, good quality surimi raw material. The company started surimi processing line in 2004.

Pyi Phyto tun International Company Limited (PPT)

Location: Strand Road, Thalaisu Quarter, Myeik
Contact address: No.15, 11th Street, Lanmadaw Township, Lanmadaw P.O
11131, Yangon, Myanmar
Tel: 222-630, 220-427 Fax: 951-225-803
E-mail: PPTAMP@mptmail.net.mm
Business: Marine products, Fish meal factory, cold storage, Veneer
factory
Production capacity: 20 ton/day
General production: Surimi processing line has not started
Constraint: Surimi machine of the company not working properly. The
product quality is lower than market standard therefore the PPT
is looking for new machine and partner.
Surimi machine: Korean made (Brand)
Export of Surimi: -
Raw material: -

PPT was established in 1993 by Doctor Aung Lwin the outstanding exporter. Now PPT involved in various type of business. This is concurrently with another company with the same director, Aung Myat Phyto International Co.,Ltd for live seafood products, Fishing vessels, Ice making plant, Dry dock yard, Plywood, Soft-shell crab farm and Shrimp farm.

At present, PPT has produced frozen prawn 6 metric-ton per day and fish 100 metric-tons per day. Almost are exported to Europe and Asia.



Fig.7 At Pylonechantha trading Co.,Ltd



Fig. 8 At A.S.K. Andaman Limited



Fig. 9 Preparing surimi raw material at Mascot Industries Co.,Ltd.



Fig. 10 Fish landing at Mascot Industries Co.,Ltd fishing port



Fig. 11 Surimi raw material from Mascot Industrial Co., Ltd

15. Mr. Hla Than Director
Pyi Phyto Tun International Co.,Ltd (Marine product, Fish meal, Cold storage, Veneer
factory)
Strand Road, Thalaisu Quarter, Myeik
Tel: 095-59-41728 Fax: 095-59-41729
E-mail: hlathan@ppt.com.mm

16. Ms. Ni Ni Lwin General Manager
Pyi Phyto Tun International Co.,Ltd

17. Mr. Giegy Angelo Production Manager, Surimi and value Added Products
A.S.K. Andaman Limited (Surimi plant and cold storage)
Yangon Office: 11-A, Thanlwin Road, Kamayut Township, Yongon, Myanmar
Tel: 951-505-535/707-232 Fax: 951-501-785/505-464
E-mail: gpa-aska@myanmar.com.mm

18. Mr. Maung Sitt Director
Mascot Industries Co.,Ltd (Fishing Vessels, Ice making plant, Processing plant)
Yangon Office: 11-A, Thanlwin Road, Kamayut Township, Yongon, Myanmar
Tel: 951-707-232, 704-185 Fax: 951-226-213
E-mail: ums-aska@myanmar.com.mm

**INFORMATION COLLECTION FOR ECONOMICALLY IMPORTANT
SPECIES AS SURIMI MATERIAL IN SOUTHEAST ASIAN REGION**

COUNTRY SURVEY FORM

1. Surimi Production *(If not enough space, please attach separate sheet)*

No. of surimi plants	Year	No.
	1995	
	1996	
	1997	
	1998	
	1999	
	2000	
	2001	
	2002	
	2003	
	2004	
	2005	
List of present surimi plants	Name	Year established
Annual surimi production	Year	Quantity (tonnes)
	1995	
	1996	
	1997	
	1998	
	1999	
	2000	
	2001	
	2002	
	2003	
	2004	
	2005	
Fish species used for surimi production	Local name	Scientific name

2. Import of surimi by country* - quantity (tonnes) and value (US\$)
 (If not enough space, please attach separate sheet)

Year**	Country	Import	
		Quantity	Value
	<i>Total</i>		
	<i>Total</i>		
	<i>Total</i>		
	<i>Total</i>		

* If breakdown by country is not available, please provide total quantity and value for the year

** From 1995-2005 or as far back as available

3. Export of surimi by country* - quantity (tonnes) and value (US\$)
 (If not enough space, please attach separate sheet)

Year**	Country	Export	
		Quantity	Value
	<i>Total</i>		
	<i>Total</i>		
	<i>Total</i>		
	<i>Total</i>		

* If breakdown by country is not available, please provide total quantity and value for the year

** From 1995-2005 or as far back as available

INFORMATION COLLECTION FOR ECONOMICALLY IMPORTANT SPECIES AS SURIMI MATERIAL IN SOUTHEAST ASIAN REGION

SURIMI PLANT SURVEY FORM

1. Plant/Company Details *(If not enough space, please attach separate sheet)*

Name	
Address	
Total plant area (m ²)	
Total production floor area (m ²)	
Total no. of workers	
No. of production shifts	
No. of production lines	
Year established	

2. Surimi Production by Fish Species *(If not enough space, please attach separate sheet)*

Fish species used (local and scientific name)	Amount of fish used per year (tonnes)	Origin of fish (catch area or country of import)	Amount of surimi produced per year (tonnes)

3. Marketing *(If not enough space, please attach separate sheet)*

Surimi type	Export country	Export quantity per year (tonnes)	Export value per year(US\$)

4. Yearly Production and Export – quantity (tonnes) and value (US\$)
(If not enough space, please attach separate sheet)

Year*	Surimi type**	Production		Export	
		Quantity	Value	Quantity	Value
	<i>Total</i>				
	<i>Total</i>				
	<i>Total</i>				
	<i>Total</i>				

* From 1995-2005 or as far back as available

** If breakdown by surimi type is not available, please provide total quantity and value for the year

5. Utilization of the surimi processing waste e.g. fishmeal, animal feed, etc.
(If not enough space, please attach separate sheet)

ANNEX III

1. Catch percentage of marine fish in Tanintharyi Division

Species	2003-2004	2004-2005	in 2005-2006
White pomfret	0.55	0.52	0.48
Black pomfret	0.87	0.86	0.84
Spanish mackerel	0.69	0.71	0.65
John's snapper	0.66	0.64	0.63
Grouper	0.52	0.55	0.57
Javelin	0.68	0.70	0.65
Ribbon fish	19.23	21.23	22.87
Squid	3.46	3.48	4.00
Lizzard fish	3.35	3.50	3.65
Halibut fish	4.50	4.35	4.20
Wolf herring	0.65	0.71	0.70
Sea eel	0.92	0.89	0.70
Platoo	7.36	7.25	6.89
Platoo Kae	12.06	11.25	7.35
Big eye croaker	8.59	8.75	8.80
Hard tail scad	3.57	3.63	3.70
Cuttle fish	0.96	0.98	0.80
Octopus	0.75	0.60	0.55
Pentaprion longimanus	0.96	0.98	1.20
Rays	0.38	0.42	0.46
Rays (small)	0.38	0.40	0.40
Barracuda	1.22	1.15	1.05
Horse mackerel	0.65	0.70	0.72
Trump whitting	1.30	1.10	0.27
Milk white fish	0.57	0.54	0.45
Sand crab	0.08	0.10	0.12
Threadfin bream	2.74	2.80	3.15
Small fin tuna	15.00	17.12	18.32
Sea cat fish	1.22	1.20	1.10
(Sint Oh Phone)	1.30	1.10	0.98
Plotosus sp	0.50	0.53	0.48
Lobotes surinamensis	0.39	0.40	0.38
(Win Win Tauk)	0.45	0.50	0.48
Miscellaneous	5.49	5.40	5.50

2. List of check in and check out of off shore fishing boat and total catch in Taninthary division during April 2005 – February 2006

Sr. No	Month	Check out Vessels	Check in Vessels	Catch (Ton)			
				Fish (Ton)	Shrimp (Ton)	Trash Fish (Ton)	Total (Ton)
1.	April	239	240	6365.25	79.86	1387.20	7832.30
2.	May	286	204	6322.34	68.96	907.00	7298.30
3.	June	278	255	6350.35	86.70	1203.05	7640.10
4.	July	332	304	6559.50	96.70	1398.41	8054.61
5.	August	273	396	9592.57	124.66	3054.55	12770.78
6.	September	253	276	5532.75	74.05	1239.73	6837.53
7.	October	277	313	5746.00	78.00	1753.00	7577.00
8.	November	349	256	4611.45	109.16	1037.40	5758.00
9.	December	334	336	5164.61	95.80	1889.14	7149.55
10.	January	383	387	7965.82	101.41	2235.64	10302.87
11.	February	286	278	5100.50	111.20	1112.00	6323.70