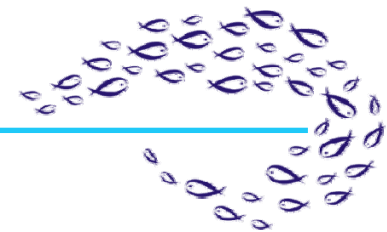
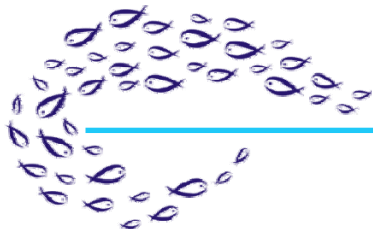




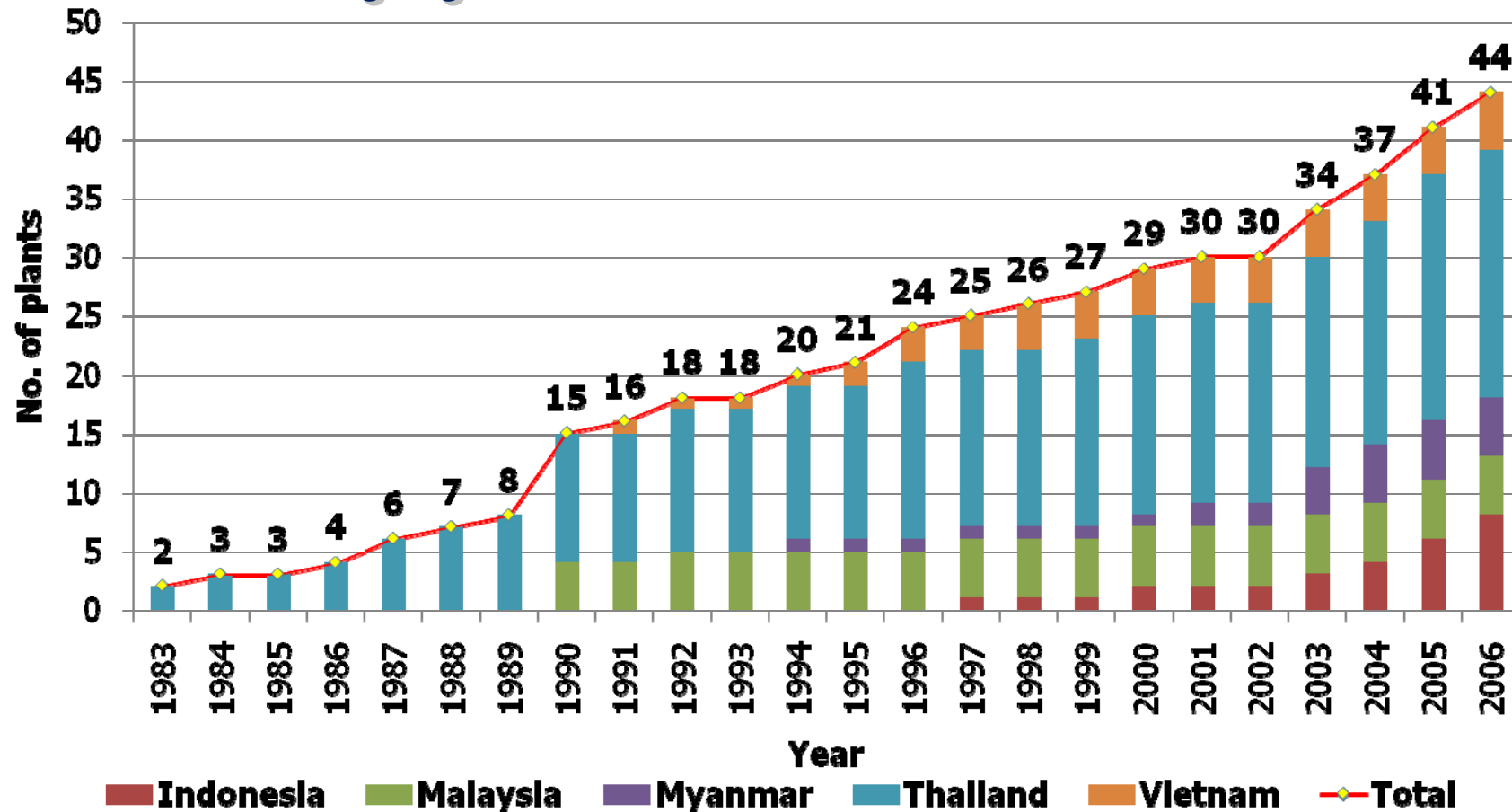
Status of Surimi Industry in the Southeast Asia 2001-2006



Under the Japanese Trust Fund Program

SEAFDEC/TD

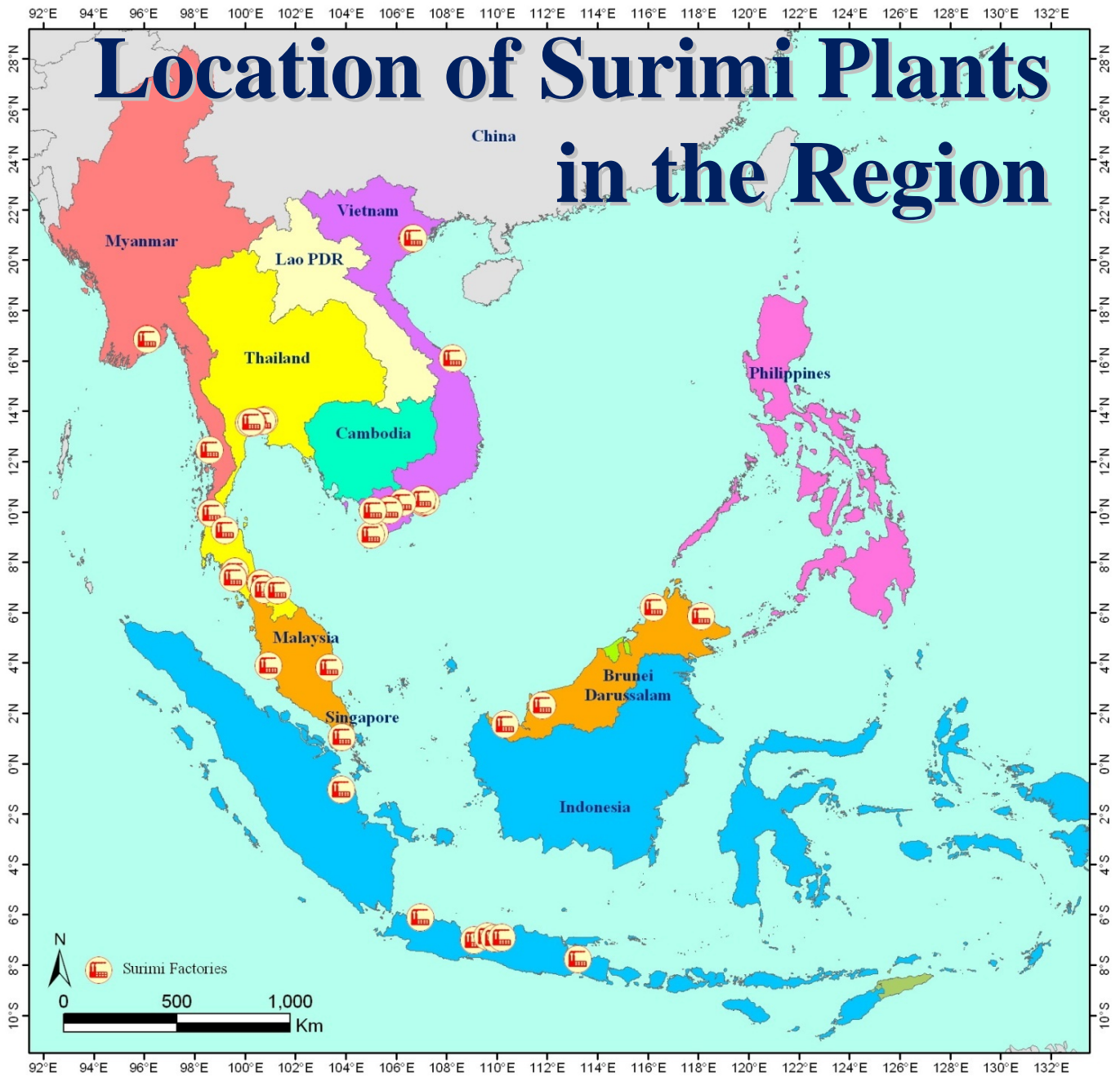
Number of Surimi plants by year establishment



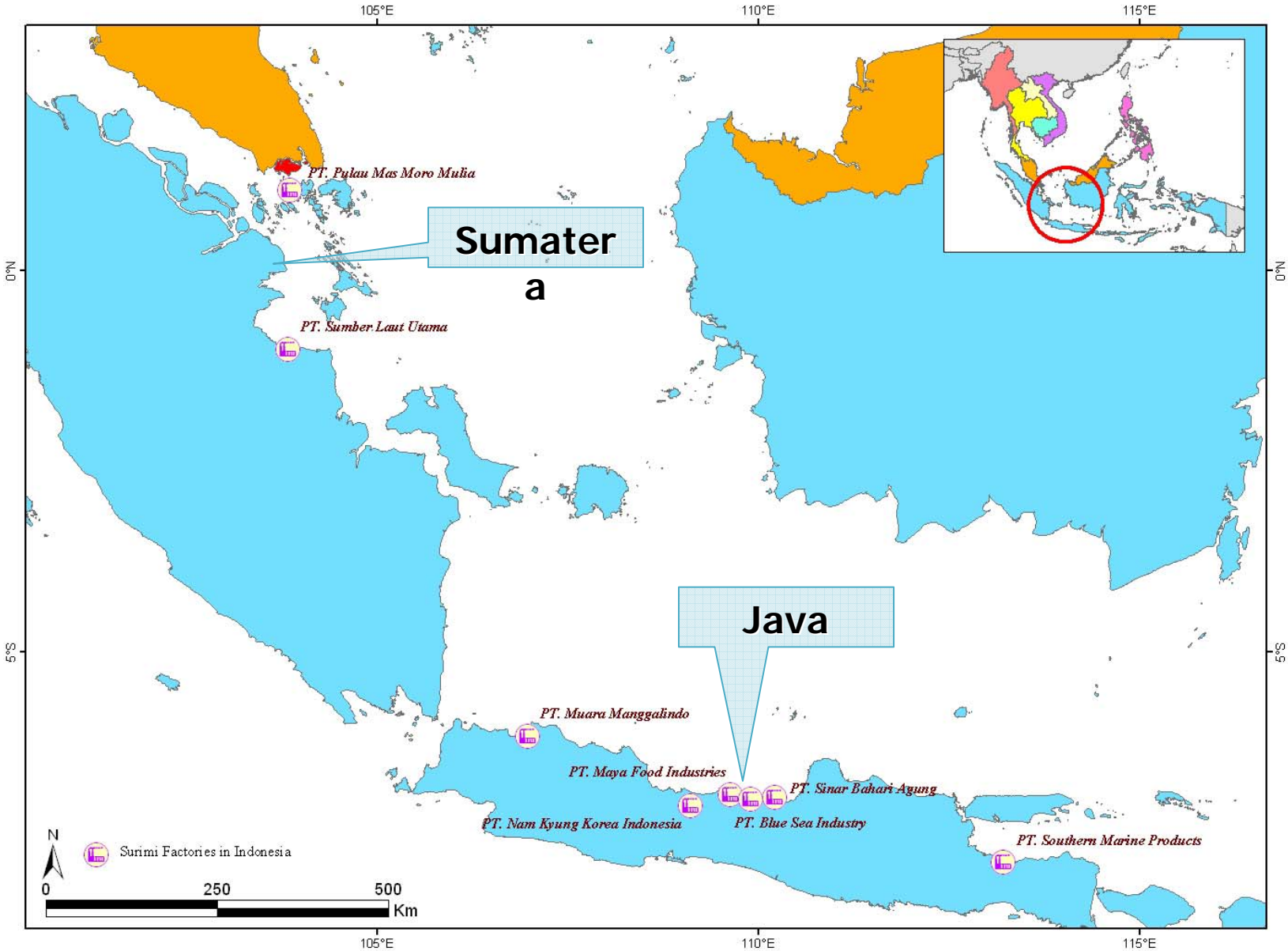
****Do not have the establishment information on 1 plant in Myanmar and 12 plants in Vietnam.**

In 2006 total 57 plants; Indonesia 8, Malaysia 6, Myanmar 5, Thailand 21, and Vietnam 17 plants

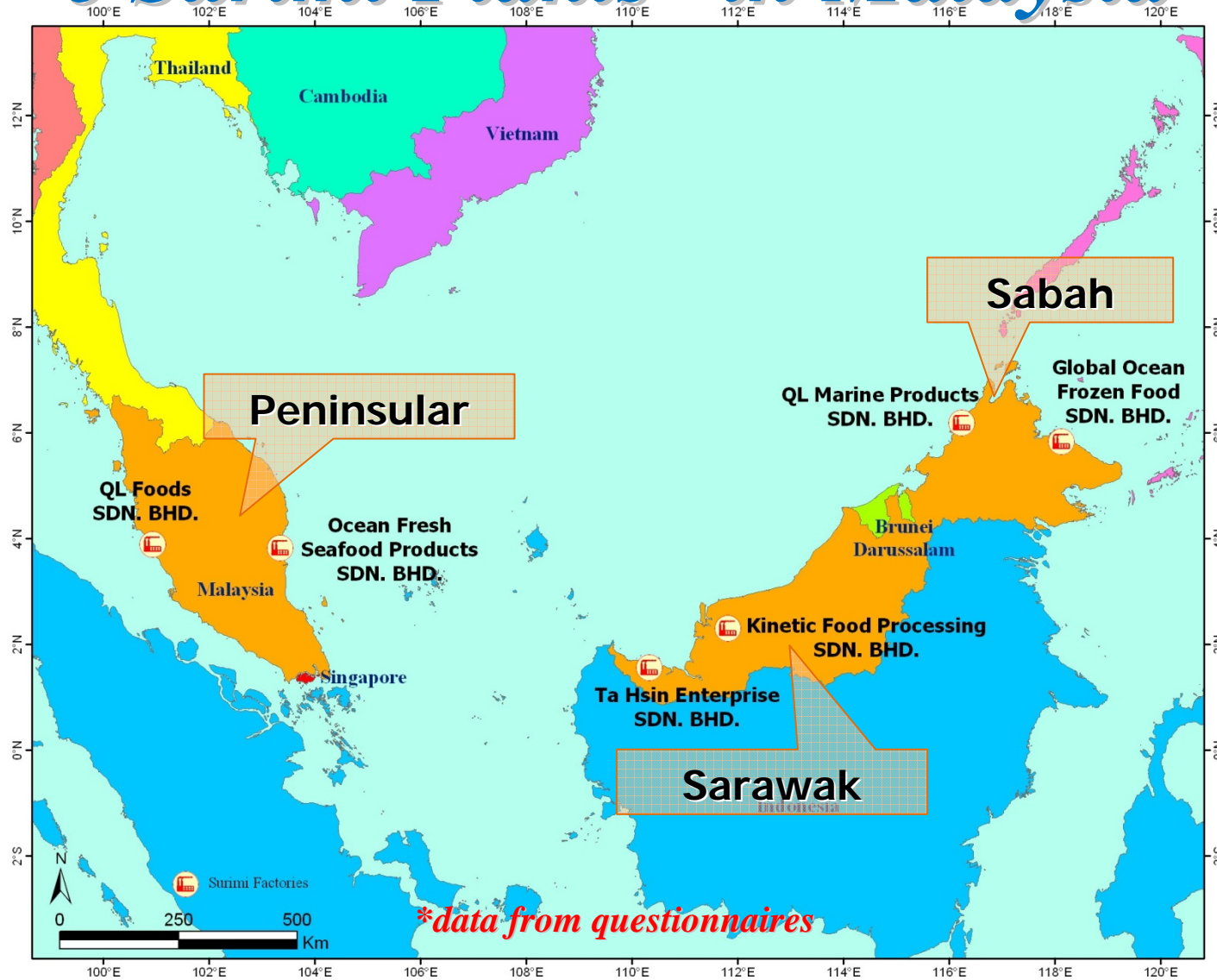
Location of Surimi Plants in the Region



8 Surimi Plants in Indonesia



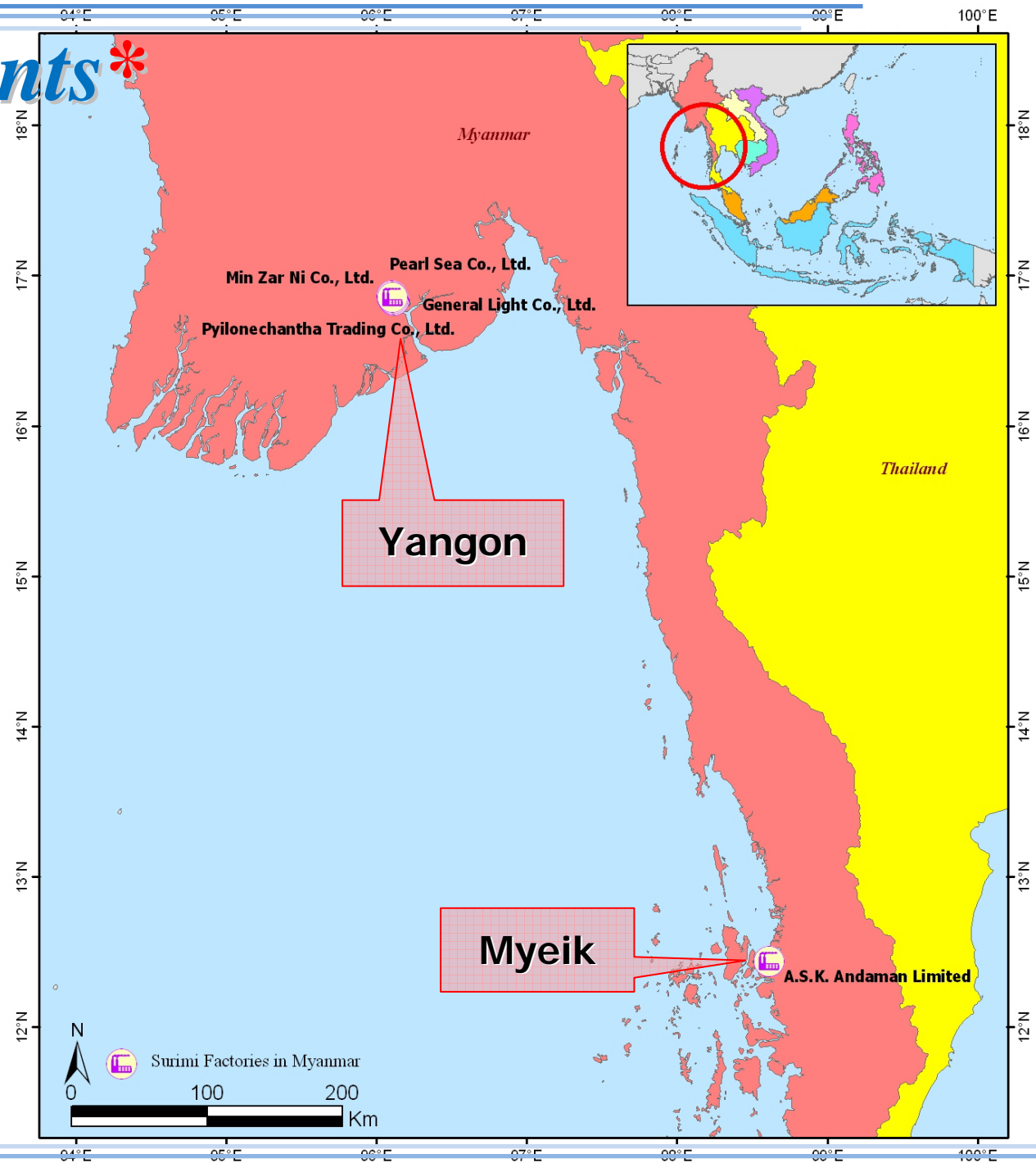
6 Surimi Plants* in Malaysia



From 2nd meeting, information from representative of Malaysia is 27 surimi plants in the year 2005

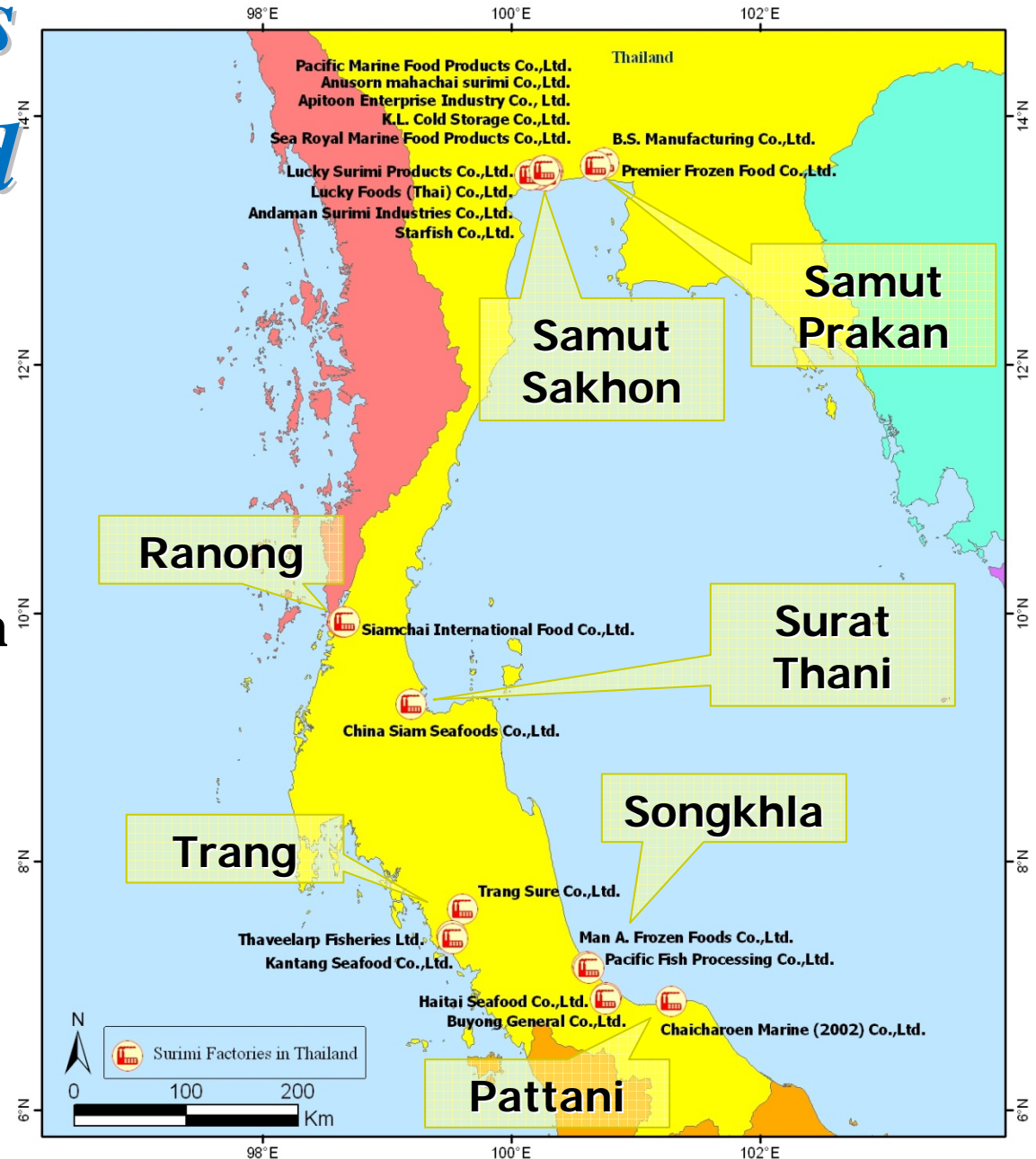
5 Surimi Plants in Myanmar

- Surimi industry in Myanmar started 1994
- Aim to utilize by catch from trawler
- 1 plant plan to start but till 2005 not yet operated



21 Surimi Plants in Thailand

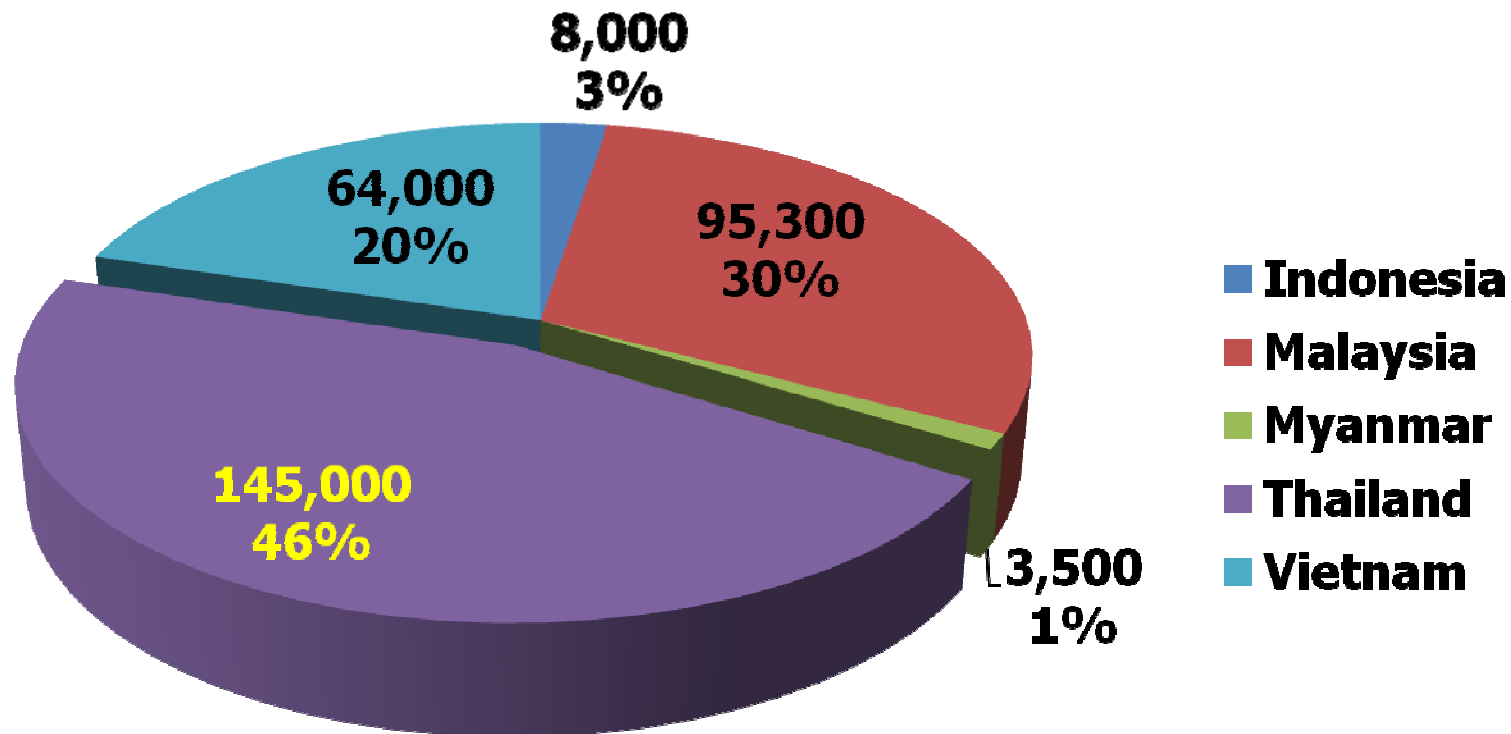
- Surimi industry in Thailand had started around 1983
- Aim to utilize by catch from trawler
- Total number of Surimi plants till 2006 is 21 plants



17 Surimi Plants in Vietnam



Total Surimi Products in the year 2005

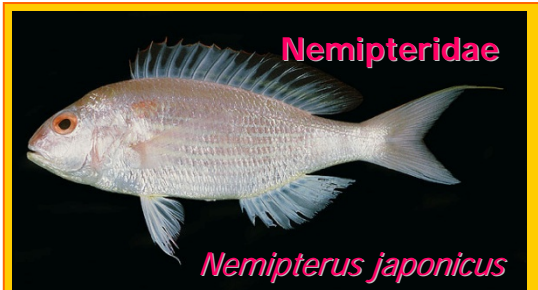


❖ Overall surimi products in the Region in 2005 are estimated 315,800MT.

❖ Largest surimi producer is Thailand and follow by Malaysia and Vietnam.



Species Used as Raw Materials



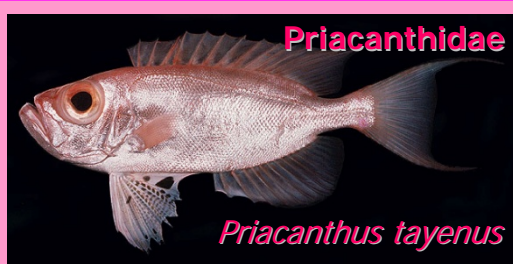
Nemipteridae

Nemipterus japonicus

N. bleekeri, N. peronii, N. numurus, N. metatophorus, N. zysron



Nemipterus tambuloides

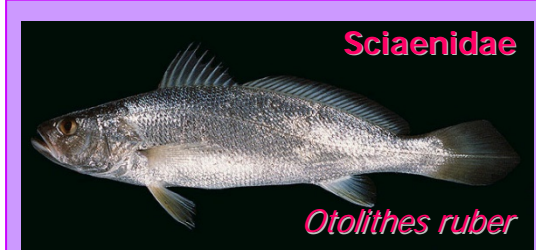


Priacanthidae

Priacanthus tayenus



Priacanthus macracanthus



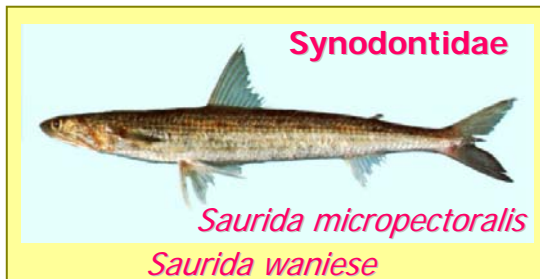
Sciaenidae

Otolithes ruber

Pennahia macrophthalmus
Johniops vogleri



Pennahia macrocephalus



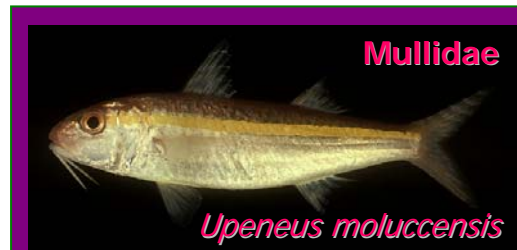
Synodontidae

Saurida micropectoralis

Saurida waniese



Saurida undosquamis



Mullidae

Upeneus moluccensis



Mullus surmuletus

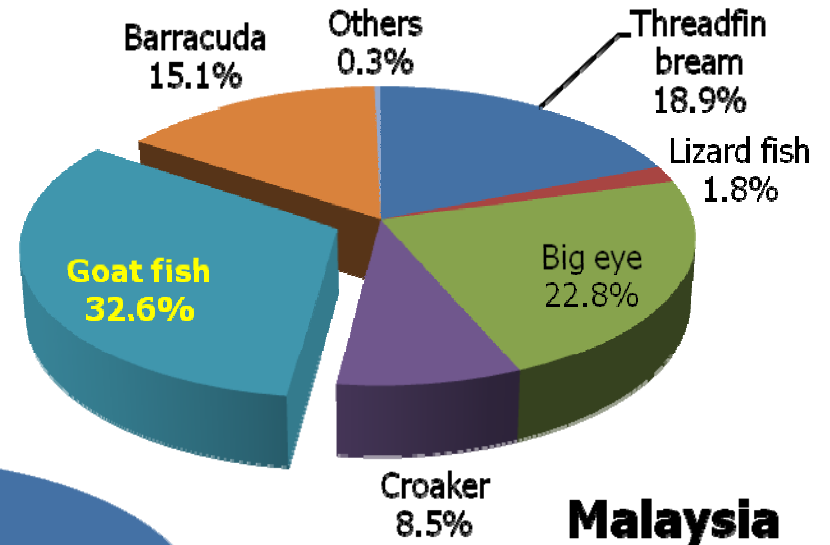
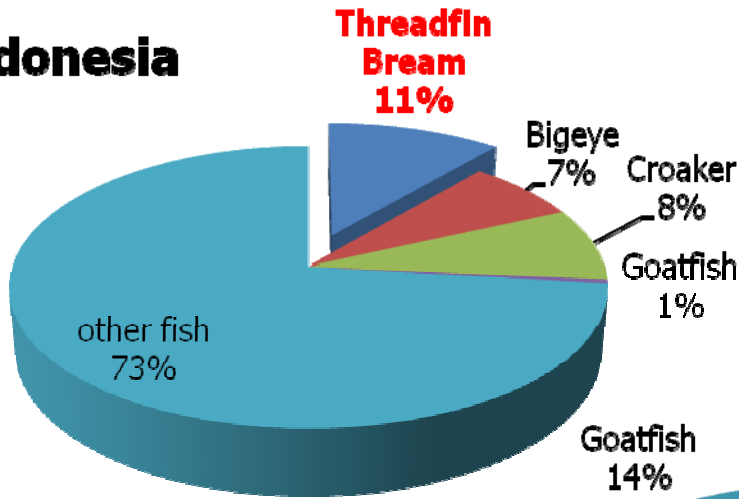
Species Used as Raw Materials



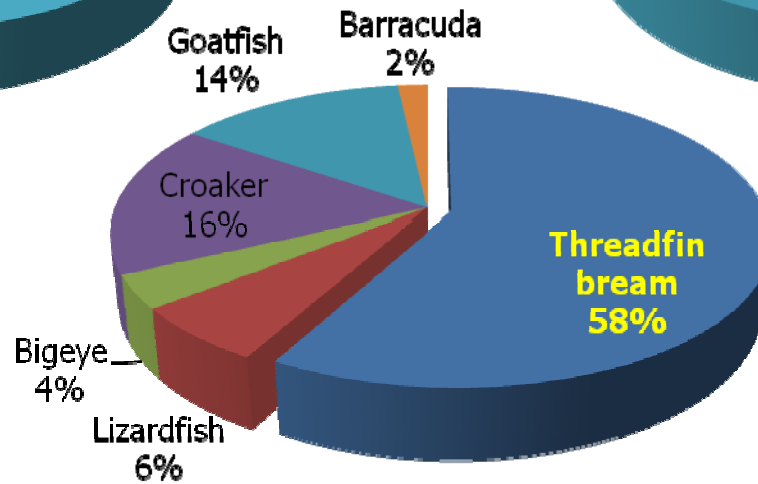
Clupeidae (Sardine) *Sardinella* spp.
Trichiulidae (Hair tail fish)
Siganidae (Rabbit fish)
Teraponidae (Striped therapon)
Barracuda *Sphyraena* spp.
Flat head



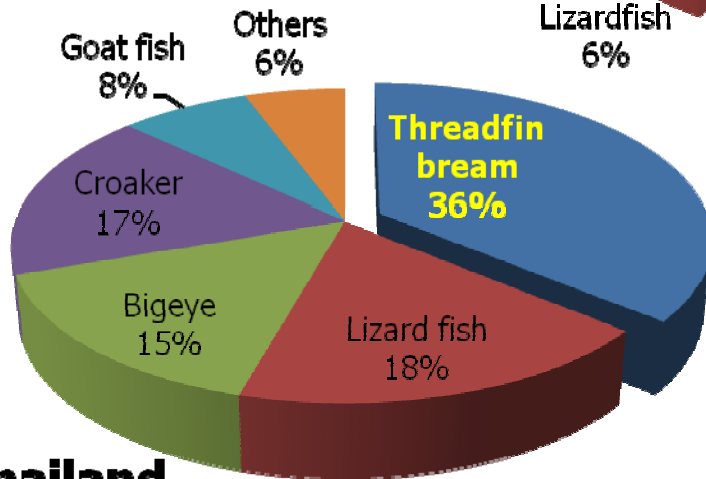
Indonesia



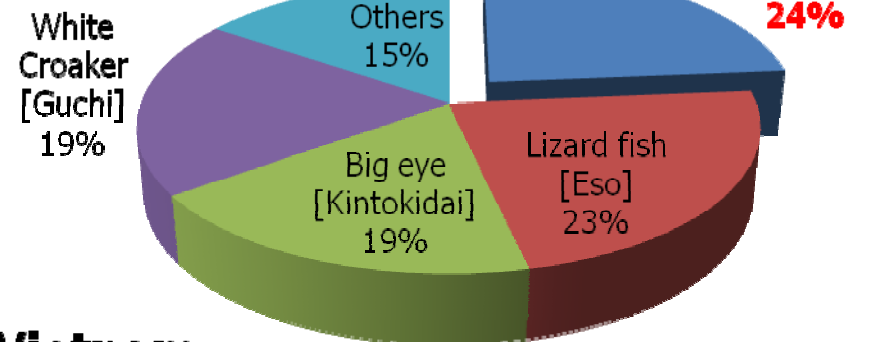
Malaysia



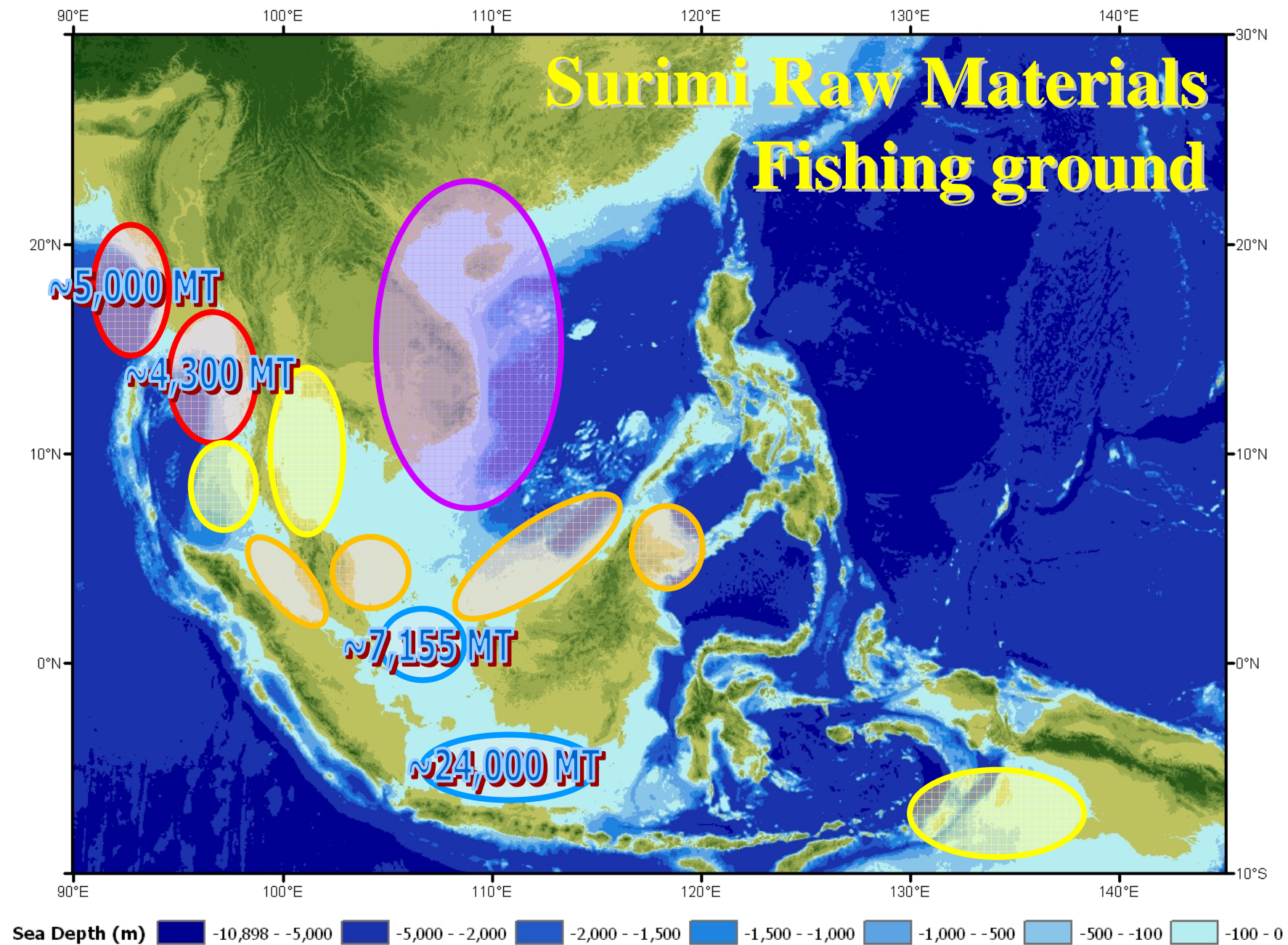
Myanmar



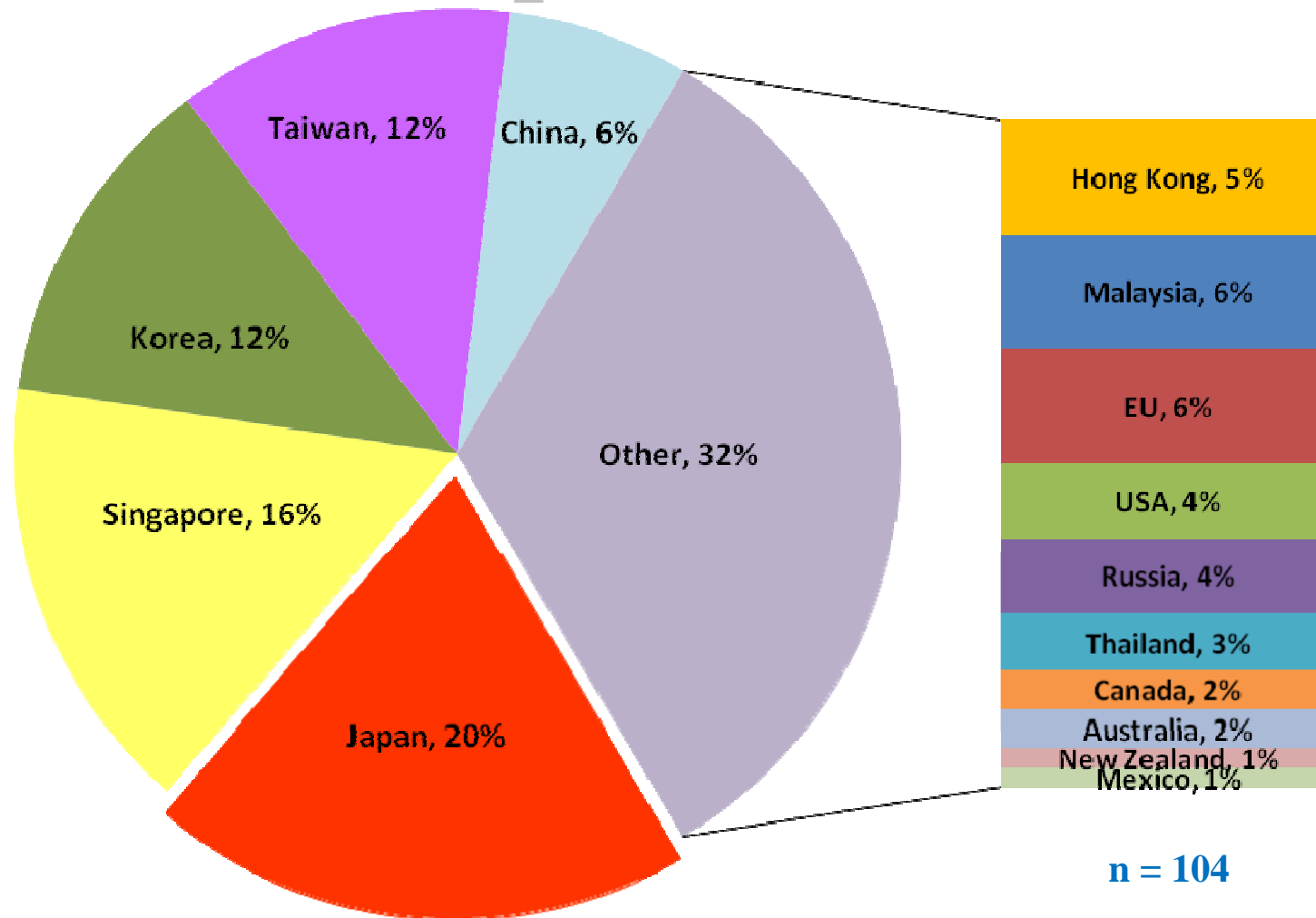
Thailand



Vietnam



Main Export Destination



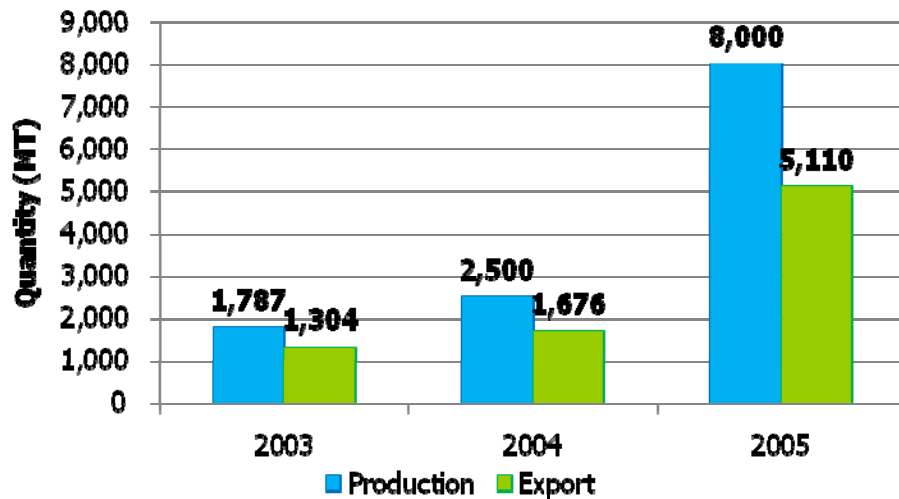
Main market

Thailand and Myanmar → Japan

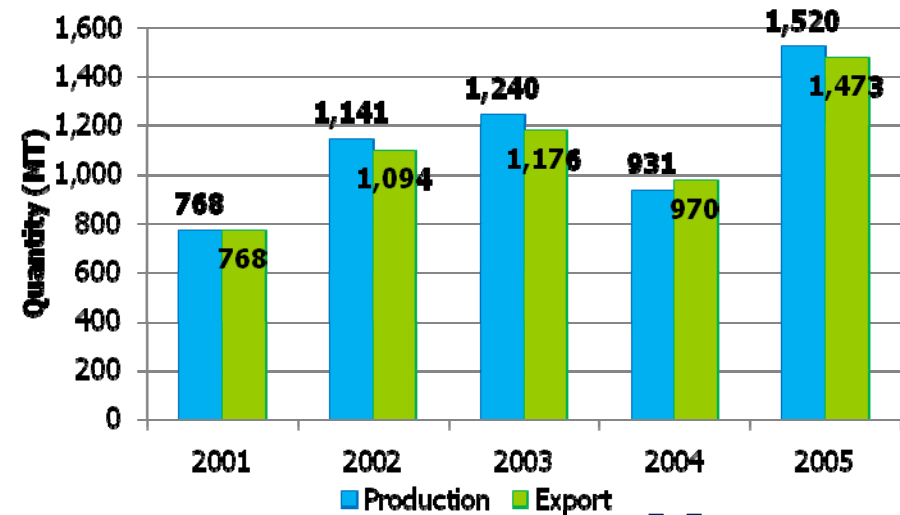
Vietnam → Korea (JP)

Indonesia → Singapore, Korea , Taiwan

Production & Export Quantity

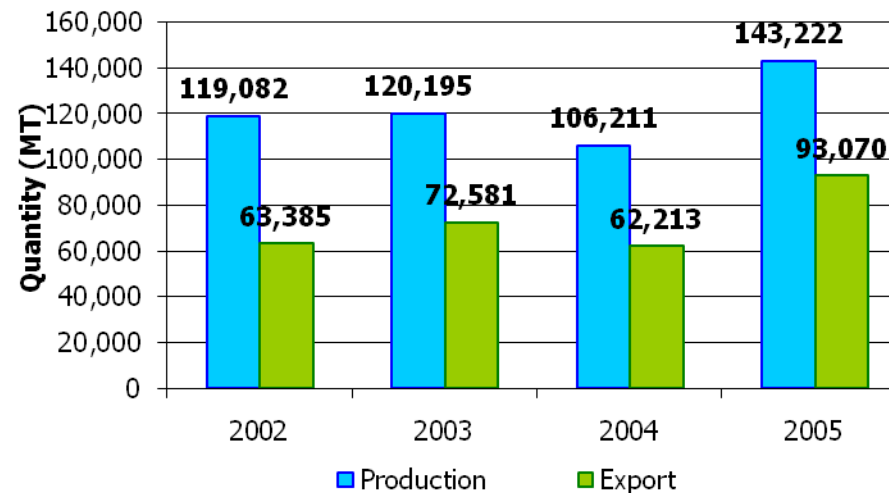


Indonesia



Myanmar

Thailand



Utilization of the surimi processing waste

Raw materials for produce a fishmeal.



- **In Thailand, mostly have their own fishmeal factories, some sell to other factories.**
 - **In Myanmar, use as raw materials for surimi second meat (lower grade).**
 - **In Vietnam, some have their own fishmeal factories and some are plan to construct the new fishmeal factories.**
-
-

Constraints faced by plants

- ❖ **Raw Materials issues**
 - **Raw materials decrease, insufficient, unstable**
 - **Quality of raw materials: fish handling, hygienic of fishing port**
 - **Competition with local market**
 - ❖ **Increasing of production cost**
 - ❖ **Shortage of labor**
 - ❖ **High competition within country and from low price surimi producer countries**
 - ❖ **Surimi price controled by buyer**
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Thank you
