

# *Marine Fisheries*

## *Sector Brief*

The objective of this short write-up is to provide the reader with an overview of the sector. The information covers global trade of the product, status of Pakistan's exports and summary of industry structure. Trade information for global comparisons has been obtained from PC-TAS, International Trade Centre's Database. Latest available export data on Pakistan has been obtained from the Federal Bureau of Statistics, Pakistan.

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## 1. Introduction:

Fisheries and aquaculture are an important source of food, employment and revenue in many countries, especially developing countries. Any marine biomass whether fished from natural environment or developed through man made farms in any form i.e. live, chilled, fresh, frozen or cooked is called seafood. These include tuna, mackerel, shrimp, prawns, molluscs, lobsters, crabs and barnacles etc. The global trend in the past decades showed that world marine and inland captured fisheries production increased and then leveled out as the world's fishing areas have reached their maximum potential with stocks being fully exploited. However, growth in aquaculture has shown the opposite tendency, with increases in production each year.

## 2. Global Perspective:

Total world exports of marine fisheries over the period 1996-2000 have remained the same. Major exporting countries in the year 2000 include Thailand, which had exports worth \$4,336 million and had a share of 9%, China, which was second with 8.41%, Norway, with 8% and Canada with 6.46%.

World Exports of Fisheries (US \$ millions)				
1996	1997	1998	1999	2000
43,439	44,287	42,720	43,908	43,401

Total world imports of marine fisheries over the period 1996-2000 have increased by 5%. Major importing countries included Japan with the largest share of 27% and USA with 18%. The developed countries Japan, USA and the countries of European Union together account for 75% of the total imports of internationally traded fishery products.

GLOBAL EXPORTERS AND IMPORTERS			
Major Exporters in the year 2000		Major Importers in the year 2000	
THAILAND	9%	JAPAN	27%
CHINA	8.41%	USA	18%
NORWAY	8%	SPAIN	6.10%
USA	6.50%	FRANCE	5.30%
CANADA	6.46%	UK	3.60%
OTHERS	62%	OTHERS	40%

Marine Fisheries includes the following categories which have been explained:

SITC CODE	CATEGORY
034	FISH,LIVE/FRSH/CHLD/FROZ
035	FISH,DRIED/SALTED/SMOKED
036	CRUSTACEANS MOLLUSCS ETC
037	FISH/SHELLFISH,PREP/PRES

### 2.1. Pakistan:

Pakistan has a total coastline of 1,050 km and a total area of approximately 300,270 sq. km. The fishing grounds are termed as highly rich in marine life with a large number of species that have great commercial value. Pakistan's consumption of fish is very low, and thus most of the produce is exported. However, there is a great dependence on a few species for exports, with very little value addition. Most of the fish catch is marine which comprises

71% of total fish exports. Pakistan's exports of marine fisheries have increased by a fractional value of 2%. Pakistan exports mainly to Europe, US, Japan and Middle-Eastern countries. For Pakistan, data is also available for the year 2000-01 which showed that Pakistan's exports of marine fisheries were \$137.8 million. This showed a decline in exports from the year 2000.

Pakistan Exports Marine Fisheries (\$ million)				
1996	1997	1998	1999	2000
147	177	132	141	150

Pakistan's imports of marine fisheries have remained at a negligible level, as Pakistan's domestic consumption is termed as one of the lowest in the world.

### **3. 034 – FISH, LIVE/FRESH/CHILLED/FROZEN:**

Total global exports of this category have increased over the period 1996-2000 by 6%. Major exporting countries include Norway with 14% of total exports, USA with 9.29% of total exports, China with 7% and Chile with 6.4%.

Total Exports (\$ million)				
034 - FISH,LIVE/FRESH/CHILLED/FROZEN				
1996	1997	1998	1999	2000
17,587	18,229	17,869	19,163	18,573

Major importing countries include Japan which had a share of 27.7% in 2000, USA which had a share of 14% and Spain with 6%.

034 - FISH,LIVE/FRESH/CHILLED/FROZEN			
Major Exporters in the year 2000		Major Importers in the year 2000	
NORWAY	14.00%	JAPAN	28%
USA	9.29%	USA	14%
CHINA	7.00%	SPAIN	6%
CHILE	6.40%	FRANCE	5.40%
DENMARK	5.00%	GERMANY	5%
CANADA	5.00%	UK	4%
SPAIN	4.50%	KOREA REP.	4%
OTHERS	48.81%	OTHERS	34%

#### **3.1. Pakistan:**

Pakistan's exports of this category in the year 2000 were \$41.42 million, which was a 21% increase from 1996-2000.

### **4. 035 – Fish, Dried/Salted/Smoked**

Total global exports of this category have decreased by 11% over the period 1996-2000. Major exporting countries include Norway with 24% of total exports, Iceland with 12% and Denmark with approximately 10% of total exports in the year 2000.

Total Exports (\$ million)				
035 - FISH, DRIED/SALTED/SMOKED				
1996	1997	1998	1999	2000
2,636	2,445	2,591	2,452	2,334

Major importing countries include Hong Kong with 18%, Portugal with 11% and Japan with 10% of total imports in the year 2000.

035 - FISH, DRIED/SALTED/SMOKED			
Major Exporters in the year 2000		Major Importers in the year 2000	
NORWAY	24.35%	HONG KONG	18%
ICELAND	12%	PORTUGAL	11%
DENMARK	10%	JAPAN	10%
CANADA	9%	ITALY	8%
CHINA	5%	SPAIN	6.60%
SWEDEN	3.35%	GERMANY	6.20%
GERMANY	3.30%	USA	5.60%
OTHERS	33%	OTHERS	35%

#### 4.1. Pakistan:

Pakistan's exports of this category have decreased by 12% over the period 1996-2000 to \$ 11.57 million. Pakistan did not have any imports in this category in the year 2000.

#### 5. 036 – Crustaceans Molluscs Etc.

Molluscs are marine invertebrates of the phylum Mollusca, typically having a soft unsegmented body, a mantle, and a protective calcareous shell. They include edible shellfish and the snails. Crustaceans are any of the various predominantly aquatic arthropods of the class Crustacea, including lobsters, crabs, shrimps, and barnacles, characteristically having a segmented body, a chitinous exoskeleton, and paired, jointed limbs.

Total Exports (\$ million)				
036 - CRUSTACEANS MOLLUSCS ETC				
1996	1997	1998	1999	2000
14,502	14,534	13,493	13,499	13,479

Total global exports of this category have decreased by 7% during the period 1996-2000. Major exporting countries in the year 2000 include Thailand with approx. 14%, Canada with 10% and Indonesia with 8% and China with a share of 6%. Total global imports of this category have increased by 9.4% during 1996-2000. Major importing countries in this category include Japan with the largest share of 30%, USA with 26% and Spain with 8% in the year 2000.

036 - CRUSTACEANS MOLLUSCS ETC			
Major Exporters in the year 2000		Major Importers in the year 2000	
THAILAND	14%	JAPAN	30%
CANADA	10%	USA	26%
INDONESIA	8%	SPAIN	8%
CHINA	6%	FRANCE	5%
USA	5.35%	HONG KONG	4.70%
MOROCCO	5%	ITALY	4.60%
AUSTRALIA	5%	CANADA	3%
OTHERS	47%	OTHERS	19%

### 5.1. Pakistan:

Pakistan's exports of this category were \$91.48 million in the year 2000. There was a decrease of 3.9% over the period 1996-2000. Pakistan did not have any imports in this category in the year 2000.

## 6. 037 – FISH/SHELLFISH, PREPARATION/PRESERVATION

Total global exports of this category have increased by 3.4%. In line with the global trend, exports tend to remain at a stable level. Major exporting countries include Thailand with a share of 23%, China with a share of 15% and Canada with 4.5% in the year 2000.

Total Exports (\$ million)				
037 - FISH/SHELLFISH, PREPARATION/PRESERVATION				
1996	1997	1998	1999	2000
8,714	9,078	8,766	8,794	9,014

Major importing countries in the year 2000 include Japan with 26%, USA with 19% and UK with 7.5%.

037 - FISH/SHELLFISH, PREPARATION/PRESERVATION			
Major Exporters in the year 2000		Major Importers in the year 2000	
THAILAND	23%	JAPAN	26%
CHINA	15%	USA	19%
CANADA	4.54%	UK	7.50%
DENMARK	4.40%	FRANCE	6%
SPAIN	4%	GERMANY	5%
KOREA REP.	3.50%	ITALY	5%
GERMANY	3%	CANADA	3%
OTHERS	43%	OTHERS	28%

### 6.1. Pakistan:

Pakistan's exports were \$5.139 million in the year 2000 and there was an increase of 10% over the period 1996-2000. Pakistan did not have any imports in this category in the year 2000.

## **7. Industry Structure:**

This sector offers employment to over one million people, most of which work as fishermen. There are 38 processing units out of which 27 are used for freezing. Their total capacity is about 450 tonnes per day. Their average capacity utilization is 25%. However, only 21 out of the 27 freezing plants are functioning. The other 11 are used for canning. The total installed capacity for these canning plants is 106 MT/day. However, only one is functioning. Areas where marine fishing is carried out are Karachi, Gwador and Pasni.

The Karachi harbour is the biggest and most important harbour for fishing in Pakistan. Infrastructure facilities available include 10 floating piers with a berthing capacity of 32 vessels on both sides. There is also an ice/oil supply bunker available for future accommodation of 300tons/day flake ice plant and an oil dispensing station. This harbour is handling over 2000 vessels.

Other harbours in Pakistan do not have the relevant infrastructure for transport of fisheries such as roads and utilities. The Korangi fish harbour was constructed to divert congestion from the Karachi harbour and to promote deep-sea fishing. It has a 709-meter long jetty. However it is still not operational, though recently a few deep-sea vessels have begun to use the harbour facilities. The Gwador harbour is the third important harbour in Pakistan and has a 416 meter long and 65 meter wide jetty.