

## Situation and Problems Faced by the Fishery Industry

EVELYN GEOK HOON CHIA

Marine Fisheries Research Department, Primary Production Department  
Ministry of National Development, Singapore

### Introduction

Currently, the market for fish products manufactured in Singapore is mainly for local consumption. There are 104 fish processing plants (small and big scale) including 17 of them in the export business. Some of the processing factories also export fish products which are imported and processed from other countries.

The 2 main categories of fish products produced in Singapore is comminuted and frozen. The former comprises fish balls, fish cakes, *chikuwa*, breaded fish fingers and squid rings, cuttlefish balls, fingers and paste and prawn balls and fingers. The frozen products consist of cooked prawns, fish fillet, prawns, squid, cuttlefish and whole fish.

### Comminuted Products

The production of breaded fish fingers has increased from 48 tonnes in 1988 to 653 tonnes in 1993, while the production of breaded squid ring has increased from 96 tonnes in 1988 to 699 tonnes in 1993 (Table 1). The production of fishball, fishcakes and *chikuwa* is the highest in 1989 at 950 tonnes whereas the product with the lowest production volume is prawn balls and fingers at 17 tonnes in 1988.

As compared to the production volume, the export figures are not substantial (Table 2). That the export figure in 1992 of prawn balls and fingers is higher than the production volume is explained by the fact that part of it was previously imported products. The highest export figure belongs to the breaded squid ring where their destinations are Australia and the European Union. From both Table Nos. 1 and 2, the main comminuted product produced in Singapore for local consumption is actually fishballs, fishcakes and *chikuwa*.

### Frozen Products

The largest production is fish fillet with nearly 41,000 tonnes over the 6-year period from 1988 to 1993 (Table 3). The year of highest frozen products was 1990 with over 35,000 tonnes.

The highest export product is fish fillet with 31,184 tonnes over the 6 years and the year of highest export volume was in 1990 with a volume of 18,133 tonnes (Table 4). The destination countries are the EU, USA, Hong Kong, Taiwan, Saudi Arabia, Japan and the Middle-East countries.

Frozen products are mainly for export; and they are not so popular locally as consumers here prefer freshly caught seafood that can be bought in the local wet market or supermarkets.

### Problems

Due to a shortage of land and high labour cost, many of the fish processing establishments in Singapore are unable to increase their scale of production. There is also a need for the fish processing factories to improve their manufacturing practices and implement programmes such as HACCP or GMP to increase the quality of their products and enable them to fully meet the requirements of the importing countries.

For the past few years, it is required for fish processing establishments to submit their annual production, export and local consumption figures according to the licensing requirements. However, submission of the price of raw materials and final products is not required. Thus, these data are generally not available in the survey. In order to fulfill the objectives of the survey, it is necessary to establish a close relationship with the fish processing industry so that we can obtain their cooperation in data collection for future surveys.

### Conclusion

This survey has served its purpose in updating information on the current situation of the fish processing establishments in Singapore. The total production volume for comminuted products and frozen products from 1988 to 1993 is 10,002 tonnes and 112,860 tonnes respectively. Local consumption of comminuted products during this period is 66% of the total production volume. The export volume of frozen product is about 65% of its production.

Table 1. Production of comminuted products (tonnes), 1988-1993.

Types of Comminuted Products	Production Volume (tonnes)					
	1988	1989	1990	1991	1992	1993
Breaded fish finger	NA	NA	48	131	468	653
Breaded squid ring	96	125	NA	291	384	699
Cuttlefish balls, fingers, paste	44	95	328	207	606	52
Fishball, fishcakes, <i>chikuwa</i>	638	950	539	298	545	385
Prawn balls, fingers	17	18	49	49	103	78
<b>Total</b>	<b>795</b>	<b>1188</b>	<b>964</b>	<b>976</b>	<b>2106</b>	<b>1867</b>

Table 2. Export of the comminuted products (tonnes), 1988-1993.

Types of Comminuted Products	Export Volume (tonnes)					
	1988	1989	1990	1991	1992	1993
Breaded fish finger	NA	NA	47	131	384	643
Breaded squid ring	96	125	NA	291	17	699
Cuttlefish balls, fingers, paste	NA	NA	22	44	6	52
Fishball, fishcakes, <i>chikuwa</i>	38	48	NA	20	53	98
Prawn balls, fingers	5	3	2	19	468	47
<b>Total</b>	<b>139</b>	<b>176</b>	<b>71</b>	<b>505</b>	<b>928</b>	<b>1539</b>

Tables 3. Production of frozen products (tonnes), 1988-1993.

Types of Frozen Products	Production Volume (tonnes)					
	1988	1989	1990	1991	1992	1993
Cooked prawn	421	566	1549	1703	1038	394
Fish fillet	3985	4610	7054	7938	8464	8438
Prawn	2088	2049	2611	3844	3230	3956
Prawn meat	Nil	Nil	55	21	26	62
Whole fish	1929	6913	9875	5302	5331	5270
<b>Total</b>	<b>8423</b>	<b>14,138</b>	<b>35,282</b>	<b>18,808</b>	<b>18,089</b>	<b>18,120</b>

Table 4. Export of frozen products (tonnes), 1988-1993.

Types of Frozen Products	Export Volume (tonnes)					
	1988	1989	1990	1991	1992	1993
Cooked prawn	421	556	1547	1420	1038	394
Fish fillet	3696	3227	6745	6583	7578	7355
Prawn	1511	1537	2141	3735	2936	3394
Prawn meat	Nil	Nil	41	10	16	51
Whole fish	1584	2766	7659	3694	3254	3165
<b>Total</b>	<b>3516</b>	<b>8086</b>	<b>18,133</b>	<b>15,442</b>	<b>14,822</b>	<b>14,359</b>