

factors and certainly cannot be compared for example to beach prices being paid to fishermen. Prices do fluctuate.

AGL is involved in the beche-de-mer business in fishing processing and marketing and are happy to help prospective partners in all facets of the business and would welcome any enquiries to:

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ASIL GROUP LTD

List of indicative grades and values as at 1/5/93

Code	Species	Scientific name	Pcs/kg unless stated Grade	C+F per kg Asian ports US\$
	Giant BDM (Amberfish)	<i>Thelenota anax</i>	One grade	2.65
A	Black teatfish	<i>Holothuria nobilis</i>	A = large	9.00
B	Black teatfish	<i>Holothuria nobilis</i>	B = small	6.00
	Blackfish	<i>Actinopyga miliaris</i>	One grade	7.50
A	Brown sandfish	<i>Bohadschia marmorata vitiensis</i>	A = 4.5" (+)	4.00
B	Brown sandfish	<i>Bohadschia marmorata vitiensis</i>	B = 4.5" (-)	2.50
	Curryfish	<i>Stichopus variegatus</i>	One grade	7.00
	Surf redfish	<i>Actinopyga mauritiana</i>	One grade	6.50
	Elephant trunkfish	<i>Holothuria fuscopunctata</i>	One grade	9.00
	Greenfish	<i>Stichopus chloronotus</i>	One grade	9.00
	Lollyfish	<i>Halodeima atra</i>	One grade	0.80
	Prickly redfish	<i>Thelenota ananas</i>	One grade	11.50
A	Sandfish	<i>Holothuria scabra</i>	A = 15-30	20.00
B	Sandfish	<i>Holothuria scabra</i>	B = 31-50	14.00
A	Stonefish	<i>Actinopyga lecanora</i>	A = 2" (+)	5.50
B	Stonefish	<i>Actinopyga lecanora</i>	B = 2" (-)	3.80
	Snakefish		One grade	0.60
	Leopard (tiger) fish	<i>Bohadschia argus</i>	One grade	4.50
A	White teatfish	<i>Holothuria fuscogilva</i>	A = 3-4	14.00
B	White teatfish	<i>Holothuria fuscogilva</i>	B = 5-7	10.00
C	White teatfish	<i>Holothuria fuscogilva</i>	C = 8-10	6.00
	Triangle fish		One grade	0.62
A	Golden sandfish		A = <15	25.00
B	Golden sandfish		B = 15-30	20.00
C	Golden sandfish		C = 30-50	14.00

Recent evolution of Hong Kong and Singapore sea cucumber markets

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The world beche-de-mer market has always been largely controlled by chinese traders. Historical data, from as far back as 1917, and the evolution up to 1986 have been presented previously (Conand, 1986, 1989).

The recent statistics are presented for the two main markets, Hong Kong and Singapore, which serve also as re-exporting centres.

Hong Kong market

It is by far the major centre. The available statistics for the last years were analysed and the results are recorded in Table 1a and 1b for imports and re-exports respectively. They relate to tonnage values in Hong Kong dollars and average value per kilogram. The number of countries of origin, or destination, with tonnage over 1 tonne, is given to illustrate the diversity of trading patterns and countries over 50 tonnes highlight the most important countries. For these, the statistics are expressed in terms of percentages of the annual tonnage and value.

Imports

The historical record for tonnage and value was in 1988, followed by a drop in 1989; nevertheless the mean price per kg is still increasing. Hong Kong

imports come from ten main countries and islands, classed by decreasing importance in 1989: Indonesia, Singapore, Philippines, Fiji, China, Maldives, Solomon Islands, Papua New Guinea, Madagascar, New Caledonia. The mean value per kilogram is low for the products imported from Philippines and Indonesia, slightly higher for the Pacific Islands. Products coming from the Western Indian Ocean (Madagascar, Tanzania, Mozambique) fetch good prices but the highest are for the temperate Pacific countries.

Re-exports

These peaked in 1987 with nearly 5,000 t. During the last years, the average price has always been lower for re-exports. This is due to cheaper products destined for China, which still represents three quarters of the re-exports.

Table 1a: Hong Kong imports

Year	Tonnage T (t)	Value V (HK\$)	Value v (HK\$/kg)	Number of countries	
				> 1 t	>50 t
1986	5,193	110,947,000	21.4	26	10
1987	5,896	131,820,000	22.4	28	19
1988	7,716	191,240,000	24.8	26	10
1989	4,526	134,306,000	29.7	25	9

Year	Main countries of origin											
	Philippines			Indonesia			Pacific Islands			Singapore		
	% T	% V	v	% T	% V	v	% T	% V	v	% T	% V	v
1986	30	19	13.5	47	31	13.8	6.7	11.3	36.1	6	11	39.7
1987	33	16	10.9	37	28	17.1	12.9	14.0	24.4	6	13	44.4
1988	22	13	14.2	40	31	19.0	18.4	19.4	26.0	10	14	33.5
1989	14	8	16.3	39	29	21.7	9.4	8.7	27.6	23	20	25.4

Table 1b: Hong Kong re-exports

Year	Tonnage T (t)	Value V (HK\$)	Value v (HK\$/kg)	Number of countries	
				> 1 t	>50 t
1986	4,535	59,822,000	13.2	12	4
1987	4,975	55,479,000	11.2	13	3
1988	3,303	56,322,000	17.1	11	3
1989	1,847	46,723,000	25.3	11	4

Year	Main countries of origin											
	China			U.S.A			Taiwan			Singapore		
	% T	% V	v	% T	% V	v	% T	% V	v	% T	% V	v
1986	86	54	8.2	1	10	84.0	6	15.8	31.9	3	14	56.2
1987	87	52	6.7	1	8	96.9	8	19.8	26.6	2	13	71.5
1988	79	45	9.6	1	9	119.5				4	14	66.3
1989	74	46	15.7	3	15	60.6				3	7	60.6

Singapore market

This is the second market for imports and re-exports, but the local retail market is also very important. The available statistics for the last years are analysed and the results are recorded in Table 2a for imports and Table 2b for re-exports. As noted by Van Eys and Philipson (1991), the import statistics are 'in a sense unreliable' as beche-de-mer does not carry import duty; it is not always specifically mentioned in shipments of dried seafoods. This explains why, in 1986, the re-exports exceeded the imports. Yet for the last years, the figures seem more accurate.

Domestic consumption is estimated from the difference between imports and re-exports, as there is no local production; it has increased from 22 t in 1987 to 69 t in 1988 and to 85 t in 1989, but appears to be reducing, with 42 t in 1990.

Table 2a: Singapore imports

Year	Tonnage T (t)	Value V (S\$)	Value v (S\$/kg)	Number of countries	
				> 1 t	>50 t
1986	814	9,599,000	11.8	18	8
1987	840	9,251,000	11.0	18	6
1988	1,225	14,614,000	11.9	22	7
1989	1,023	11,863,000	11.4	18	6
1990	1,068	12,321,000	11.5	18	7

Compared with Hong Kong, there has been only a slight, more or less regular, increase in the tonnages imported, which as for Hong Kong peaked in 1988. On the whole, for the recent period, Hong Kong represents six times more than Singapore.

Nowadays the major suppliers are the Maldives, the Pacific Islands, Tanzania and Malaysia. Up until a few years ago, the main exporters were Sri Lanka, India and the Philippines.

Re-export destinations have also changed. More than half of the re-export tonnages are now destined for Hong Kong. Based on the mean values per kg, high grade beche-de-mer goes preferentially to Taiwan and low grade to Malaysia.

Year	Main countries of origin											
	Malaysia			Tanzania			Pacific Islands			Maldives		
	% T	% V	v	% T	% V	v	% T	% V	v	% T	% V	v
1986	17	10	6.7	14	6	5.1	23	24	12.1	0.4	0.5	15.6
1987	17	12	7.8	24	12	5.5	16	17	11.3	2.0	3.0	15.5
1988	8	4	5.9	21	15	8.6	14	12	10.0	28.0	34.0	14.5
1989	7	3	5.1	16	11	7.8	23	17	14.4	25.0	22.0	10.8
1990	6	3	5.3	10	5	6.8	15	17	13.4	29.0	25.0	9.9

Table 2b: Singapore re-exports

Year	Tonnage T (t)	Value V (S\$)	Value v (S\$/kg)	Number of countries	
				> 1 t	>50 t
1986	1,217	6,683,000	5.5	6	3
1987	818	7,395,000	9.0	7	3
1988	1,156	11,232,000	9.7	6	3
1989	938	10,043,000	10.7	7	3
1990	1,026	11,022,000	10.7	9	3

Year	Main countries of origin								
	Hong Kong			Malaysia			Taiwan		
	% T	% V	v	% T	% V	v	% T	% V	v
1986	54	47	4.8	35	33	5.1	9.0	16.0	9.4
1987	47	55	10.5	36	27	6.8	14.0	13.0	8.6
1988	54	62	11.1	34	20	5.8	7.0	13.0	16.0
1989	46	46	10.6	27	14	5.7	16.0	29.0	18.5
1990	63	56	9.6	15	9	6.7	12.0	21.0	18.9

Trade between Hong Kong and Singapore

Trade between Hong Kong and Singapore obtained from their respective import and re-export statistics is presented in Table 3.

If there was good correspondence between the statistics, imports from Singapore (1) should be equal to re-exports to Hong Kong (4) and imports from Hong Kong (3) should be equal to re-exports to Singapore (2).

This is not the case and on the whole Hong Kong values are higher than those of Singapore. The general tendency is a flux from Singapore to Hong Kong which is just the opposite to the flux which existed between 1981 and 1984. The exchange is made through sister companies, with higher grades imported in Singapore and lower grades in Hong Kong, probably in relation with the China market.

Table 3: Bêche-de-mer exchanges between Hong Kong and Singapore (T = tonnage; V = value in local currency; v = mean value per kg)

			1986	1987	1988	1989	1990	
H O N G	1	Imports	T	301	399	798	1,068	
		from	V	11,938,000	17,719,000	26,710,000	27,138,000	
		Singapore	v	39.7	44.4	33.5	25.4	
K O N G	2	Re-exports	T	152	103	123	55	
		to	V	8,551,000	7,364,000	8,157,000	3,334,000	
		Singapore	v	56.2	71.5	66.3	60.6	
S I N G A P O R E	3	Imports	T	84	30	48	18	47
		from	V	1,744	542,000	847,000	301,000	1,060,000
		Hong Kong	v	20.8	18.1	17.6	16.7	22.6
E	4	Re-exports	T	656	386	631	439	651
		to	V	3,157	4,068,000	6,977,000	4,660,000	6,221,000
		Hong Kong	v	4.8	10.5	11.1	10.6	

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Beche-de-mer harvesting in the Northern Province of New Caledonia

*Source: Northern Province Fisheries Division
Kone, New Caledonia*

Forty-eight species of holothurians have been recorded in the lagoon around New Caledonia. At present, four of these are being harvested for the food market: blackfish, sandfish, teatfish and lollyfish. According to figures supplied by the four main exporters, total 1991 production was over 100 tonnes dry weight, 95 per cent of which came from the Northern Province.

Blackfish, found mainly in the northern lagoon, accounted for 68 per cent of the total. In second place came sandfish, with 28 per cent of the total catch. This species occurs primarily in the western lagoon.

Beche-de-mer is purchased unprocessed from fishermen by local groups and fishing concerns