



เสวนา เรื่อง ปฏิรูปการส่งออกไทยอย่างไร เมื่อไร GSP สหภาพยุโรป



By Dr. Chanintr Chalisarapong
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Senior Vice President of Sea Value Group, Thailand
24 September 2014

TOPICS

- 1. Tuna Export and Import Statistics**
- 2. Thai Tuna Industry on Global Trade**
- 3. Thai Tuna Industry's Proactive Response to combat child labour, forced labour and trafficking in persons**

1. Tuna Export and Import Statistics

1.1 Thai Export of Tuna Products

(including tuna petfood) in 2011-2013

1.2 Thai's Import of Frozen Raw Tuna in 2011-2013

1.3 Current Situation in 2014 (Jan-Jul)

1.3.1 Thai's Import of Frozen Raw Tuna

1.3.2 Thai's Export of Tuna Products

1.1 Thai Export of Tuna Products to Main Markets in 2011-2013

Products	Country	Quantity (Ton)			% Growth		% Share 2013	Value (Million Baht)			% Growth		% Share 2013
		2011	2012	2013	11/12	12/13		2011	2012	2013	11/12	12/13	
Canned Tuna + Tuna Loin	World	576,399	559,493	550,832	-3	-2	100	69,329	82,598	80,058	19	-3	100
	U.S.A.	121,250	109,479	103,758	-10	-5	19	15,600	17,747	15,578	14	-12	19
	Middle east	72,561	76,099	74,325	5	-2	13	8,683	11,133	10,564	28	-5	13
	EU	84,274	61,300	79,914	-27	30	15	10,479	9,519	12,397	-9	30	15
	Japan	32,706	33,159	34,226	1	3	6	5,202	6,171	6,102	19	-1	8
	Others	265,608	279,456	258,610	5	-7	47	29,365	38,028	35,417	30	-7	44
Tuna Petfood	World	69,488	70,571	64,381	2	-9	100	5,601	6,867	6,387	23	-7	100
	U.S.A.	2,615	7,431	8,629	184	16	13	130	592	723	355	22	11
	Middle east	352	373	289	6	-23	0	22	33	32	50	-3	1
	EU	7,241	8,508	9,380	17	10	15	810	1,167	1,314	44	13	21
	Japan	45,962	42,035	34,927	-9	-17	54	3,769	3,934	3,375	4	-14	53
	Others	13,318	12,224	11,156	-8	-9	17	870	1,141	944	31	-17	15
Total of Tuna Products		645,887	630,064	615,213	-2	-2	-	74,930	89,465	86,445	19	-3	-

Sources : www.moc.go.th

Prepared by : Thai Tuna Industry Association

1.2 Thai Import of Frozen Raw Tuna by Types from the World in 2011-2013

Frozen Raw Tuna	Country	Quantity (Ton)			% Growth		% Share 2013	Value (Million Baht)			% Growth		% Share 2013
		2011	2012	2013	11/12	12/13		2011	2012	2013	11/12	12/13	
Albacore	World	42,906	53,516	48,482	25	-9	6	3,942	5,892	3,739	49	-37	8
Yellowfin	World	89,392	120,461	105,488	35	-12	14	5,847	9,079	7,410	55	-18	15
Skipjack	World	631,881	534,572	576,713	-15	8	77	32,132	35,262	36,375	10	3	74
Bigeye	World	7,024	3,690	15,540	-47	321	2	391	249	1,034	-36	315	2
Others	World	10,245	10,250	6,503	0	-37	1	407	572	272	41	-53	1
Total of Frozen Raw Tuna		781,448	722,489	752,725	-8	4	100	42,719	51,054	48,828	20	-4	100

Sources : www.moc.go.th

Prepared by : Thai Tuna Industry Association

1.3.1 Thai Export of Tuna products to Main market in Jan-July 2014

Product	Country	Quantity (Ton)		% Growth	Value (million Bath)		% Growth	Value (million USD)		% Growth
		Jan-Jul 2013	Jan-Jul 2014		Jan-Jul 2013	Jan-Jul 2014		Jan-Jul 2013	Jan-Jul 2014	
Canned Tuna + Tuna Loin	World	323,750	349,287	8	46,880	45,245	-3	1,583	1,403	-11
	U.S.A.	61,660	64,332	4	9,297	8,403	-10	314	261	-17
	Middle east	46,927	56,636	21	6,578	7,347	12	222	228	2
	EU	42,801	30,839	-28	6,548	4,390	-33	221	136	-38
	Japan	20,860	20,040	-4	3,660	3,451	-6	124	107	-13
	Other	151,502	177,439	17	20,796	21,655	4	702	672	-4
Tuna Petfood	World	34,922	38,077	9	3,362	4,044	20	114	125	10
	U.S.A.	4,419	4,610	4	338	437.3	30	11	14	19
	Middle east	166	280	68	19	26	37	0.6	0.7	17
	EU	4,382	6,395	46	624	992	59	21	31	46
	Japan	18,898	18,700	-1	1,810	1,831	1	61	57	-7
	Other	7,058	8,092	15	572	758	32	19	24	22
Total of Tuna Products		358,672	387,364	8	50,241	49,289	-2	1,697	1,529	-10

Source : www.moc.go.th

Prepared by : Thai Tuna Industry Association

1.3.2 Thai Import of Frozen Raw Tuna by Types from World in Jan-July 2014

Frozen Raw Tuna	Quantity (Ton)		% Growth	Value (M Baht)		% Growth	Value (M USD)		% Growth
	Jan-July 2013	Jan-July 2014		Jan-July 2013	Jan-July 2014		Jan-July 2013	Jan-July 2014	
Albacore	28,080	34,752	24	2,183	3,177	46	73	97	34
Yellowfin	74,383	66,544	-11	5,286	3,873	-27	177	119	-33
Skipjack	395,681	332,638	-16	25,488	14,768	-42	851	453	-47
Bigeye	10,547	13,709	30	701	673	-4	23	21	-12
Total	508,690	447,643	-12	33,658	22,490	-33	1,123	689	-39

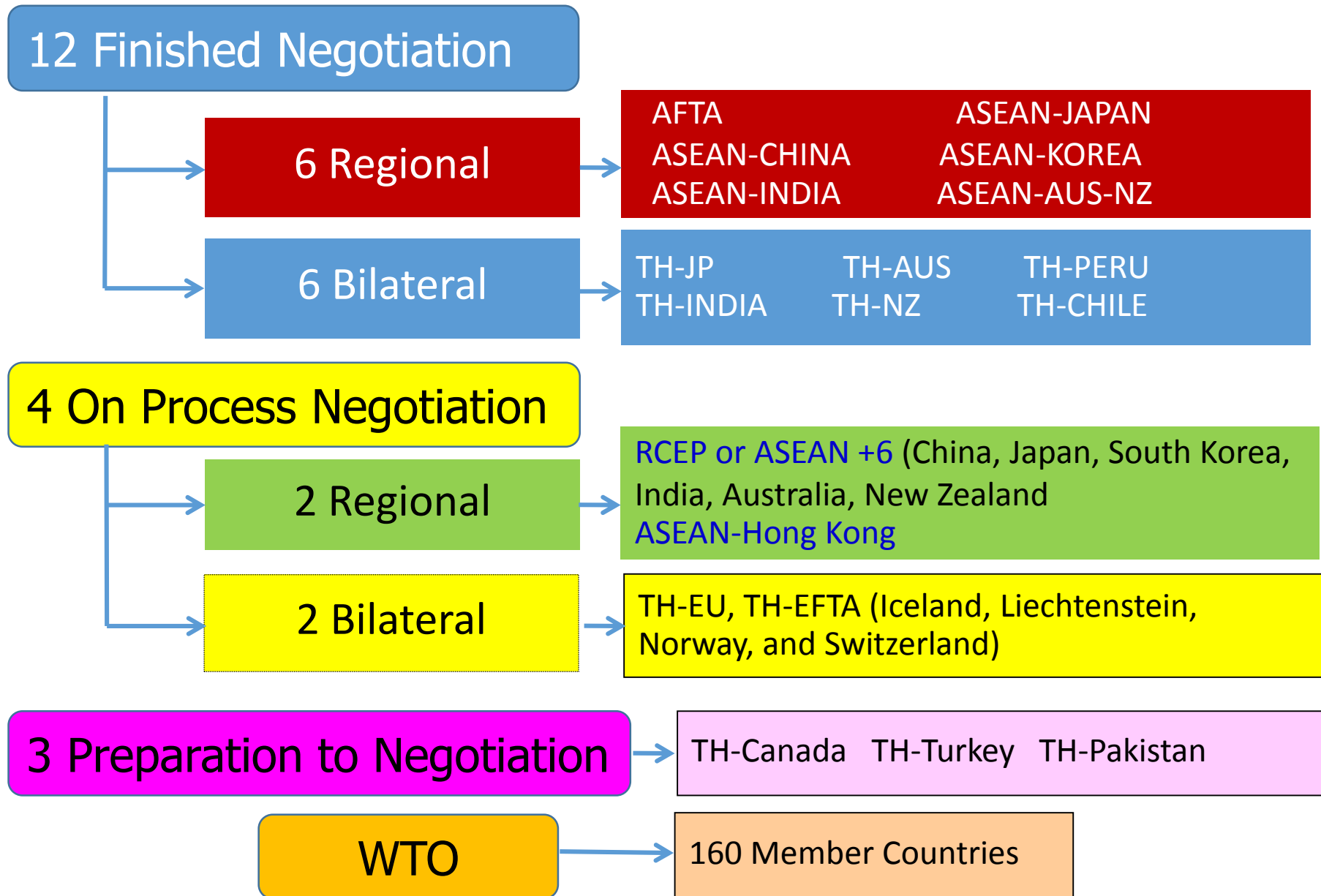
Source : www.moc.go.th

Prepared by : Thai Tuna Industry Association



2. Thai Tuna Industry on Global Trade

Global trade - THAI'S FTA NEGOTIATION





EU Market

- EU market is the world's largest tuna consumption
- Thai tuna products share 15% of total EU import, in average 80,000 ton per annual
- Since 1 Jan 2014 onwards, Thai's tuna products H.S.code 160414 was terminated from EU GSP

At present, the European Union impose one of the world's most expensive import duty on Thai tuna **at 24% MFN rate** , while the African, Caribbean and Pacific Group of States (ACP) enjoy 0% tariff.

This disadvantage, along with **the Rule of Origin restriction** are two of the key issues that **we urge the government to negotiate for tariff reduction in the Thai-EU FTA.**

Thai Tuna Industry's Position on TH-EU FTA

Market Access on Trade in Goods

(1) Request tuna loin and canned tuna, HS code 160414, to be included in TH-EU FTA negotiation

(2) Tariff reduction

Option 1 : Early Harvest Category

from 24% MFN rate to 0% from day 1 or soonest

(3) Rule of Origin

Request flexible ROO by Change in Tariff Classification,

Change of Chapter (CC) and no other conditions

(4) Set up TH-EU Jointed Committee on Technical

There are many EU's NTB in relation to fishery products, for example, **environmental issue, labour issue, illegal fishing issue, food safety and sustainable issue.**



3. Thai Tuna Industry's Proactive Response to combat child labour, forced labour and trafficking in persons

- 3.1 TTIA's Policy Commitment on Ethical Code of Conduct**
- 3.2 Good Labor Practice (GLP) for Tuna Processing Industry**
- 3.3 Implementation and Monitoring toward Ethical Standards**
- 3.4 Tuna Processing Plants in cooperation with Government & NGOs**
- 3.5 Study on "A Survey of Migrant Worker Employment Practices in the Thai Tuna Processing Sector"**

3.1 TTIA's Policy Commitment on Ethical Code of Conduct



การประกาศเจตจำนงร่วมต่อต้านการใช้แรงงานเด็กที่มีผิดกฎหมาย แรงงานบังคับ และการค้ามนุษย์ด้านแรงงาน ในธุรกิจการประมง และอุตสาหกรรมต่อเนื่อง Declaration of Intent for jointly combating child labour, forced labour and human trafficking in Fishing and relating Industry

สมาพันธ์ผู้ผลิตสินค้าประมงไทย โดยสมาคมอาหารแช่เยือกแข็งไทย สมาคมผู้ผลิตอาหารสำเร็จรูป สมาคมอุตสาหกรรมทูน่าไทย สมาคมกุ้งไทย สมาคมการประมงแห่งประเทศไทย สมาคมการประมงนอกน่านน้ำไทย สมาคมผู้ผลิตอาหารสัตว์ไทย และสมาคมผู้ผลิตปลาป่นไทย ขอประกาศเจตจำนงต่อต้านการใช้แรงงานเด็กที่มีผิดกฎหมาย แรงงานบังคับ และการค้ามนุษย์ด้านแรงงาน โดยยึดถือปฏิบัติให้ถูกต้อง ดังนี้

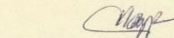
- ❖ ส่งเสริมและสนับสนุนให้แรงงานมีคุณภาพชีวิตที่ดี ทำงานอย่างมีคุณค่า และมีศักดิ์ศรี
- ❖ ร่วมต่อต้านการใช้แรงงานเด็กที่มีผิดกฎหมาย รวมถึงขจัดการใช้แรงงานบังคับ และการค้ามนุษย์ด้านแรงงาน โดยปฏิบัติตามกฎหมายแรงงานไทยและสอดคล้องกับมาตรฐานแรงงานระหว่างประเทศ
- ❖ ส่งเสริมและสนับสนุนการให้ความคุ้มครองสิทธิแรงงาน ดูแลสภาพการทำงานที่เป็นธรรม และการทำงานให้ถูกต้องตามกฎหมาย

Thai Fishery Producers Coalition by Thai Frozen Foods Association; Thai Food Processors' Association; Thai Tuna Industry Association; Thai Shrimp Association; National Fisheries Association of Thailand; The Thai Overseas Fisheries Association; Thai Feed Mill Association and The Thai Fishmeal Producers Association declare our strong intention to combat child labour, forced labour and human trafficking by performing requirement under the labour law as follows:

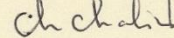
- ❖ promote and support them to have quality of life and decent work with their dignity;
- ❖ facilitating collaboration to combat child labour and eliminating forced labour and human trafficking to comply with the Thai labour law and international labour standards;
- ❖ making greater support on labour rights protection and working employment under the law.



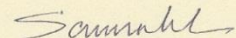
(นายพนันท์ อรัณวิตumnานนท์)
นายกสมาคมอาหารแช่เยือกแข็งไทย



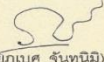
(นางสาวกัญญกัต ดันดีทิพัฒน์พงศ์)
นายกสมาคมผู้ผลิตอาหารสำเร็จรูป



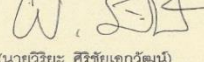
(นายชินนทร ชลิตราทงศ์)
นายกสมาคมอุตสาหกรรมทูน่าไทย



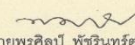
(นายสมศักดิ์ ปณิตธยาศัย)
นายกสมาคมกุ้งไทย



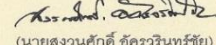
(นายภูเบศ จันทนิม)
ประธานสมาคมการประมงแห่งประเทศไทย



(นายวิริยะ สิริชัยเอกวัฒน์)
นายกสมาคมการประมงนอกน่านน้ำไทย



(นายพรพิศป์ พัชรินทร์ตะกุล)
นายกสมาคมผู้ผลิตอาหารสัตว์ไทย



(นายสงวนศักดิ์ อัครวรินทร์ชัย)
นายกสมาคมผู้ผลิตปลาป่นไทย



- ▶ Companies applying to our members are required to submit their written commitment in compliance with **TTIA's Ethical Labor Practice – Code of Conduct**, mostly based on Thai law.

It covers 8 items as follows:

(1) Child Labour

(2) Forced and Compulsory Labour

(3) Health and Safety

(4) Freedom of Association and Right to Collective Bargaining

(5) Discrimination

(6) Disciplinary Practices

(7) Remuneration

(8) Welfare and Benefit

TTIA's Ethical Labor Practice – Code of Conduct

(1) Child Labour

No workers under age of 18 years old is engaged or employed in the processing plants. Upon recruiting, all applicants shall provide a government-issued passport, Identity card and/ or work permit for verifying age and legality to work respectively.

(2) Forced and Compulsory Labour

Workers are not required to pay deposits or recruitment fee to the company. The company shall not lodge passport, Identity card and/or work permit belonging to The workers. The company shall not withhold any part of workers' salary and benefits.

(3) Health and Safety

Occupational health and safety of workers shall be of the utmost concern for the company. At minimum, all legal requirements of related laws must be fulfilled. They include to the provision of necessary personal protective equipment at the employer's expenses, first aid treatment, and assistance for follow-up medical treatment.

(4) Freedom of Association and Right to Collective Bargaining

As permitted by Thai law, the company shall respect the rights of workers for freedom of association and collective bargaining.

TTIA's Policy Commitment on Ethical Code of Conduct

(5) Discrimination The company shall not allow any behavior indicating harassment, discrimination or bullying. Education and training on the fundamental of human rights shall be conducted for all personnel concerning the supervision of workers and security practice. The company shall have in place the mechanism and grievance handling to ensure fair treatment of workers.

(6) Disciplinary Practices The company shall not engage in or tolerate the use of corporal punishment, mental or physical coercion, or verbal abuse of workers. Deductions from wages as a disciplinary measure are not allowed.

(7) Remuneration The minimum daily wage shall be fully paid according to Thai law to everyworkers. Overtime work shall be reimbursed at a premium rate and paid leave shall be granted as defined by Thai Law.

(8) Welfare and Benefit Social security payments are contributed by both workers and company in accordance with Thai Labour Law – which ensure all workers are eligible for national health care coverage. The company shall register every workers to this scheme from the first day of employment. For the period where the national health care coverage is not yet in effect, the company shall provide adequate medical treatment and expenses to assist any work-related injuries and illnesses.

3.2 Good Labor Practice (GLP) for Tuna Processing Industry



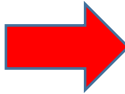
Good Labor Practice (GLP) for Tuna Processing Industry

- ▶ The Thai Government has a national policy in promoting better working conditions in fisheries and seafood processing industry in Thailand.
- ▶ On September 16, 2013, GLPs program were launched and signed commitment to implement GLP by shrimp, seafood and tuna processing enterprises: 81 PPs and 97 seafood processing plants (65 frozen and 32 canning operators).
- ▶ **GLP guidelines** have been developed from Thai Law and ILO Convention by DOF, MOL and ILO involving stakeholders for consultations and development process.
- ▶ Since 2013, TTIA's 17 members have voluntarily participated into GPL training program. Right now they have entered into step of follow-up meeting which will be finished by the end of 2014
- ▶ For implementing labour inspection in seafood and tuna processing, it will be mainly conducted by Ministry of Labor and associated agencies.

3.3 Implementation and Monitoring toward Ethical Standards

- Tuna processing plants have already conformed to Thai Labor Law.
- Currently, there are many international ethical standards and private standards which are usually monitored by their buyers or third party audit.

- From the survey, we found that our tuna members have already complied with the following ethical standards.



List of Ethical Standards

- Thai Labour Standard: Corporate Social Responsibility of Thai Business(TLS 8001-2010 (B.E.2553) by MOL
- CSR – DIW
- Sedex Ethical Trade
- BSCI (Business Social Compliance Initiative)
- ICA (ICA SOCIAL AUDIT : Primary Production Third Party Audit)
- ICS (Initiative Clause sociale)
- ETI (Ethical Trading Initiative)
- Supplier Code of Conduct MARS
- Supplier Code of Conduct AEON
- Safeway Global Sourcing/ Intertek
- McDonald’s Social Accountability
- SYSCO Corporation (BSCC)
- **NGOs such as EII, ISSF, FOS, Finnwatch, NFI**

3.4 Tuna Processing Plants in cooperation with Government & NGOs

Urging Thai Government Action

The 8 fisheries associations have formed the joint coalition named **Thai Fisheries Producers Coalition(TFPC)** with the objective to combat child labour, forced labour and human trafficking.

Thai Chamber and **TFPC** have urged the Thai government to act to ensure labour laws are enforced and wrongdoers punished according to Thai law

NGOs

Tuna processing plants have been very opened and honest to work with local and international NGOs with the **objective to improve the working condition for the migrant workers**. Also to improve and promote the quality of life and welfare of the labour and their children who form a part of the industry.

Our cooperation with all NGOs should base on the transparency and in good faith.



Cooperation with NGOs



ရွှေ့ပြောင်း အလုပ်သမားများအတွက် အခွင့်အရေး ကွန်ယက်
Migrant Worker Rights Network (M.W.R.N)



Certified from sustainable fisheries
www.friendofthesea.org



NATIONAL FISHERIES INSTITUTE



Finnwatch



MEMORANDUM OF UNDERSTANDING ON COOPERATION IN THE TUNA TRADE BETWEEN THAI TUNA INDUSTRY ASSOCIATION (TTIA) AND NATIONAL FISHERIES INSTITUTE (NFI)

This Memorandum of Understanding on cooperation in the tuna trade is entered into between the Thai Tuna Industry Association (hereinafter referred to as "TTIA") and the National Fisheries Institute (hereinafter referred to as "NFI") It is designed to support TUNA TRADE among TTIA's Member (EXPORTER) and NFI's Member (IMPORTER). The main purpose is to combat Child Labour, Forced Labour and Human Trafficking, with detail as follows:

1. TTIA will have close cooperation with NFI to inform and update the list of TTIA's members who participate the TTIA's labor management project and achieve an ethical practice standard.
2. NFI will strongly urge NFI members to purchase tuna products only from TTIA's member on the ethical practice standard list, although that remains a company-specific decision.
3. In case of the members failing the standard, TTIA will inform NFI immediately to remove such members from the list.
4. Both parties will exchange relevant information concerning labour situation

This original MOU signed by two representatives is made in English in duplicates. Each Party shall keep a copy with equal validity. This MOU takes effect as of the date of signature by both parties

THAI TUNA INDUSTRY ASSOCIATION
BANGKOK

NATIONAL FISHERIES INSTITUTE
MCLEAN, VA

DR.CHANINTR CHALISARAPONG (Ph.D.)
PRESIDENT

JOHN CONNELLY
PRESIDENT

Date : 28-03-2014

Date : 28 Mar 2014

3.5 Study on “A Survey of Migrant Worker Employment Practices in the Thai Tuna Processing Sector”



The Thai tuna industry is a leader in GLPs and in eliminating child labor, forced labor and human trafficking.

To measure progress and identify any areas for further improvement, the Thai tuna industry has fully supported the Asian Research Center for Migration Institute of Asian Studies, Chulalongkorn University in their independent **study of "migrant worker employment practices in the Thai tuna processing sector."**

The Chulalongkorn Study has allowed domestic and international societies to assess data and facts related to the hard work that has been done by the Thai tuna industry to ensure GLPs and combat human trafficking in Thailand.

Conclusion and Suggestions

Conclusion : in overall the Thai employers of foreign migrant workers are **adhering to the relevant labor laws and standards**, and **job satisfaction and contentment of working in Thailand is high.**

Suggestions : there remain some areas for improvement, such as

- Reconsider the deduction of wages to compensate subcontractor including living & transportation cost.
- Disseminate information about workers' rights and responsibilities in their language.
- Provide written employment contracts, even though not required by Thai law.

Study on “A Survey of Migrant Worker Employment Practices in the Thai Tuna Processing Sector”

งานเปิดตัวการนำเสนองานวิจัย

“ค้นหาความจริงในอุตสาหกรรมทูน่ากับปัญหาแรงงานข้ามชาติ”

“Truth be Told : Thai Tuna Industry and Migrant Workers”

12 March 2014



Core Chulalongkorn University findings

94.1% of MW kept their official identity document, but some of MW kept by the employer for safe keeping.

82.5% of MW had a signed employment contract.

98.2% of MW received overtime pay in accordance with the national law.

80.8% of MW were not aware that their factory had an employees' Fringe Benefit board

56.9% of MW knew about workers' rights.

- ✓ All Migrant Workers (MW) in this sample were legally in Thailand.
- ✗ No employment of children.
- ✗ No MW were recruited/ employed through deceptive practices.
- ✗ No MW were physically abused or had their sexual rights violated.
- ✗ No MW had to make an advance payment to obtain employment or a guarantee of employment.
- ✓ The companies/factories have written policies for safety, occupational health, and quality work environment.



Happiness in the workplace



76.7% of MW were highly satisfied and content with their job.

Reasons included the level of pay, good boss, many friends, good work, comfortable conditions, good benefits and independents.

87.1% of MW said they were more satisfied with the work in Thailand than in their home country.



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