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BECHE-DE-MER TRADE : GLOBAL PERSPECTIVES

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ABSTRACT

The interaction between the producers and consumers of *beche-de-mer* through the traders all over the world is discussed on species composition of the trade; price levels in the major markets; consumer preferences; supply situations; quality variations; management measures towards better processing and quality control. Place of this fishery in the general fish trade and contraints in marketing in selected countries are also discussed.

INTRODUCTION

Estimated global production of *beche-de-mer* at present does not exceed thirty thousand tonnes of which 90% is processed by drying, a small percentage is canned and the rest is consumed fresh. Major production areas are the shallow seas of the Indian and Pacific Oceans. In the Atlantic Ocean, *beche-de-mer* is reported to be harvested in the Carrebean Sea. Nearly thirty countries in the world are engaged in the production, consumption, import and/or export of *beche-de-mer*.

Chinese are the traditional consumers. Japanese, Koreans, Melanesians, Micronesians and Polynesians consume *beche-de-mer* in significant quantities. Fishermen in Yemen and Oman consume *beche-de-mer* only as a curative for muscular aches and related disorders in the limbs and spine.

Beche-de-mer trade has been prerogative of the Chinese traders for a long time. Chinese mariners have been going to almost all countries in the Indian and Pacific Ocean area from time immemorial. Wherever they went they located *beche-de-mer* as a commodity to be taken back home for their cusine. The quantum of the trade was then limited by the frequency of sailings. Frequency of sailings increased with the introduction of western trading ships in the traditional Chinese sea lanes after the 15th century A. D. *Beche-de-mer* trade received the attention of the trading ships from the west. *Beche-de-mer* became an inter-trading commodity.

From East Africa to Polynesia, ships calling at the traditional trading and at the newly established trading posts scouted for inter-trading cargo and *beche-de-mer* became one of the cargoes destined to China. Aden, Colombo, Singapore, Penang, Hong Kong, Shanghai, Tokyo and Manila became important trading centres for *beche-de-mer* in the Indo-Pacific region.

Port of Aden became the collecting centre for *beche-de-mer* from East Africa. Ships taking westward cargo from Mauritius, Reunion Is., Madagascar, Mazambique, Zanzibar, Dar-es-salaam, Mombasa and Mogadishu also carried *beche-de-mer* upto the Port of Aden. Also *beche-de-mer* from Hurghada, Port Sudan, Arab, Djibouti, Hodeidah and Mukalla reached the Port of Aden through traditional boats. Chinese merchants based in Aden bought these goods in large quantities and shipped them to China and to other Far Eastern ports.

Colombo became the collecting centre for *beche-de-mer* from North Sri Lanka and South India. Also *beche-de-mer* from Maldives, Seychelles, Mauritius and other Wester Indian Ocean Islands reached Colombo either directly or through ports in South India. Makassar, Penang and Singapore became collecting centres for *beche-de-mer* produced in Sumatra, Java, Celebes Is., Timor Is. and Borneo. Those *beche-de-mer* collected at Makassar derived the name Makassar-type at the Chinese market, because of the peculiar teste. Suva in Fiji and Manila in Philippines became trading centres for the *beche-de-mer* produced in the Pacific Islands. Ships carrying cargo in between the numerous Islands in the Pacific collected *beche-de-mer* wherever they went and brought them either to Suva or to Manila. Hong Kong and Shanghai were the entry points to the mainland China for the *beche-de-mer* collected all over the region at that time.

Beche-de-mer was not the only marine product that was meant exclusively for the Chinese home market. Sharkfins and dried cuttlefish also fetched attractive prices at the Chinese ports, Hong Kong and Shanghai. The two world wars and the political consequences thereafter brought a lull in the *beche-de-mer* trade. Subsequent to the second world war, western colonial rulers started withdrawing from their domains in the Indo-Pacific region. Second world war also saw the penetration of the Japanese might into the Pacific Islands. The revolution and the aftermath in China, the departure of the British from India, the dismantling of the Dutch rule in Indonesia and the gradual emergence of nationhood in Arabia and Africa had brought about a radical change in the trading pattern of *beche-de-mer* and many other locally produced commodities.

The closure of the Suez and the subsequent loss of trade traffic through Red Sea made the port of Aden loose its significance as a trading-transit port in the region. East African suppliers and fishermen were slow to move their cargo to Singapore or Hong Kong as the sailings between East Africa and Far East were scanty. The fishery and the trade suffered. Makassar became less relevant and the focus of the import-export trade during the fifties and sixties shifted to Jakarta. Like many post-independent regimes of that time Indonesia was experimenting with new policies. Suva, Haniara, Port Villa and other ports in the South Pacific which received regular cargo liners touching ports like Manila, Hong Kong and Shanghai during the pre-war period remained remotely connected during the post-war period were from the American continent. *Beche-de-mer* fishery and the trade gradually slowed down due to the inconsistancy of shipping connections. Penang in Malaysia did not continue to be an attractive port for *beche-de-mer*. Shanghai in China lost its importance to foreign trade during the post-revolution period. Peoples Republic of China banned the imports of *beche-de-mer* along with many other commodities. Declining supplies as well as the closure of the main market resulted in a lull which continued till the early seventies. However, whatever supplies that were available were consumed by Chinese settlers in the Malay archipelago, Indo-China and the American Continent.

The disturbance of the *beche-de-mer* trade during the late forties and early fifties, resulted in the emergence of Singapore and Hong Kong as the major trading centres for *beche-de-mer*. Indonesia, Sri Lanka and India emerged as the regular suppliers of *beche-de-mer* to these markets apart from sporadic supplies from the Pacific and Middle East and East Africa. In Hong Kong most of the *beche-de-mer* trade is handled by traders who deal with dried products including marine products like dried abalone, sharkfins, dried fish, etc. The low quantum of the trade both in the retail as well as in the whole sale trade. Like the Indians and Hong Kong, Chinese also had their trading outports in Singapore for trading in *beche-de-mer*.

In 1970 about 500 tonnes of *beche-de-mer* were imported into Hong Kong. This rose to about 1000 t in 1980 and in 1985 total imports amounted to 6200 t. Indonesia has been a steady supplier to the Hong Kong market, supplying nearly a third of the total imports. During seventies South Asian and East African *beche-de-mer* reached Hong Kong either directly or through Singapore. However the pattern has now changed with Philippines becoming the largest source for *beche-de-mer*, amounting to one half of the total imports into Hong Kong during 1981-1985 period. Taiwan has been the major importer of *beche-de-mer* from Hong Kong importing approximately 200 t per annum. Korea also imports about 150 t per annum. Peoples Republic of China had gradually improved its level of imports in the recent past. Hong Kong re-exported about 60 t in 1981, which rose to 4531 t in 1985 to China.

In Singapore the trade is handled by wholesale traders dealing with other marine products like sharkfins, cuttlefish, dried fish, etc. During the late sixties and early seventies, India and Sri Lanka were the major suppliers to the Singapore market. Gradually Sabah (North Borneo) province of (East) Malaysia overtook the South Asian suppliers. Early eighties saw the steep decline of *beche-de-mer* supplies from South Asia and a sharp increase in the supplies from Philippines. Total imports of *beche-de-mer* into Singapore have remained at about 500 t per annum during the past 30 years, only the suppliers have changed. Re-exports from Singapore has been mainly to West Malaysia and Hong Kong.

The usual demand-supply-price relationship does not seem to apply to *beche-de-mer*. Prices in late sixties were about US $ 0.50 per kg on the average at the two major markets. Supplies were low then. Supplies improved thereafter. Prices have not come down, because of the increased supplies. On the contrary the prices have increased remarkably in 1985; the average price was about US $ 2.50 per kg in both trading centres. Not only that the price level was going up gradually, but also the conversion rates in the supplying countries like India, Sri Lanka, Indonesia, Philippines, Mazabique, Kenya have been favourable to exporters, that the value of these products in the producing countries have been very attractive.

At present two species of holothurians *Holothuria scabra* and *Holothuria nobilis* dominate the market. *Holothuria scabra*, the sand fish is available in large quanties and in almost all the producing countries. It is priced moderately and is affordable to most middle class Chinese. *Holothuria nobilis* the teatfish is not available in large quantities. It is harvested mostly in the seas around the Pacific Islands. Japanese prefer to eat the teatfish in its fresh form. It is also processed for drying. It is the most expensive species of *beche-de-mer* in the world. Many species of holothurians are also harvested for processing.

Mombasa in East Africa, Djibouti in the Red Sea, Suva in Fiji and Manila in Philippines appears to be developing at the regional trading centres for *beche-de-mer*, in the future. *Beche-de-mer* from Somalia, Tanzania and Mozabique find their way into Mombasa not through proper trade channels. Regularisation of this trade will enhance production in this area and the fishermen will engage themselves in the fishery with confidence. With frequent shipping links to Hodeldah, Aden, Mukalla, Asab, Port Sudan and Barbera, Djibouti appears to be a good collection point for *beche-de-mer* produced in the Red Sea and Gulf in Aden. At present, most of the resources in the sea remain unexploited. South Pacific Islands require a regional trading centre. Suva in Fiji, Honiara in Solomon Is. and Port Morseby in Papua New Guinea may be one of the ports suitable for a regional trading centre. This largely depends on the accessability to the regional trading centre by traders in the Pacific region.

People's Republic of China should reopen Shanghai port for import of *beche-de-mer* from the littoral states in the Indian and Pacific Ocean. Ports in the region receive ships from China, mostly from Shanghai and the reopening of the port for *beche-de-mer* may usher an era for the re-establishment of the prerogative Chinese enjoyed in the trade not so long ago. The market for *beche-de-mer* in the American Continent is relatively important taking the high proportion of Chinese and Japanese settlers in almost all parts of the continent. North American Chinese and Japanese are becoming conscious of quality and to match this requirement, canneries in Australia are engaged in occasionaly canning of teatfish for the North American market.

The demand for *beche-de-mer* is always on the increase. The consumers are in such large numbers. The resource is not as large as one would expect. However a planned exploitation of the available resources will sufficiently meet the immediate demand. Research laboratories have started artificial culturing of holothurians. Successful breeding under controlled conditions and their growth under natural conditions will enhance the production of *beche-de-mer* significantly. The cost of such production may be initially high affecting the price; however as the technique becomes broadbased and extended to the small-scale fishery the price of the product would be within the reach of the present market.

Producer countries should encourage direct trade with China for *beche-de-mer*. China has long been known for its barter trade. *Beche-de-mer* could be a commodity for the barter trade with China. Diversification of marketing by producing countries will take away the burden of dependency on the two major trading centres. Afterall most of what Singapore imports, is re-exported as also in the case of Hong Kong. Why not establish direct links between producer countries and consumer countries?

The market for fresh sea-cucumbers in Japan, Korea and the North American Continent should receive the attention of producer countries with facilities for to air freight their holothurian harvest. Canneries in the producer countries should be encouraged on trial basis to produce canned *beche-de-mer*. The technology is not out of reach and the market for canned *beche-de-mer* is not saturated. Improved processing method for drying and improved packing method for shipping especially for the sand-fish will improve the price level further in the market.