

1999-01

가

1999. 12

, ,

2 .

. 6 28 7 10
3 (, ,
) 가 .

가가 ,

가

가

. .

3 , ,3

가

가 ,

가

. , ,

가

가

1999 12

韓國海洋水產開發院
院長 李 廷 旭

< >

가

. 가 .

3 (, ,)
가

. 가

. 가 , 가 ,
가 가
, 가
가 .

<ABSTRACT>

A Study on the Advancing Environments of Fisheries Industry Into Southeast Asian Countries

Although the needs of exploiting new fishing ground have been increased, after the Korea-Japan fisheries agreement, we have not prepared for these needs.

So this study analyzed the fisheries industry advancing environments into three Southeast Asian Countries (Indonesia, Malaysia, Vietnam) and suggested some counter-measures. We hope that this study could be used for fishing enterprise or fisherman to want to advance the countries.

This study shows that the three countries are eager to induce foreign investment in fishing, aquaculture, fisheries processing industries and so on.

But the conditions of fisheries resources of three countries are not well investigated and infra-structures are poor. Therefore further research on three countries is necessary.

Finally, we recommended some fiscal and policy supports to fishing enterprise or fisherman by government.

1. _____ 1

1. 1

2. 2

2. . _____ 3

1. 3

1) / 3

2) / 4

3) / 5

2. 7

1) / 7

2) / 8

3) / 8

3. 10

1) / 10

2) / 14

3) / 17

3 가 _____ 21

1. 21

1) / 21

2)	/ 24	
3)	() / 33	
2.	가	40
1)	/ 40	
2)	/ 40	
3)	/ 41	
4	_____	42
1.	.....	42
1)	/ 42	
2)	/ 44	
3)	/ 44	
2.	.....	46
1)	/ 46	
2)	/ 49	
3)	가 / 50	
5	_____	51
1.	.....	51
2.	.....	51
3.	.....	52
4.	.....	52

53

55

- 1. / 57
- 2. / 67
- 3. / 69
- 4. / 72
- 5. . / 75

< -1>	3	.....	7
< -2>	3	· (1998)	9
< -3>	3	.....	10
< -4>		.....	12
< -5>		.....	13
< -6>		.....	17
< -7>		.....	19
< -1>		(MSY)	21
< -2>		.....	22
< -3>		.....	23
< -4>		.....	23
< -5>		(1999 2003)	25
< -6>		.....	30
< -7>	3	()	33
< -8>		.....	35
< -9>	3	.....	36
< -1>		.....	43
< -2>		.....	43
< -3>		.....	44
< -4>		.....	45
< -5>		.....	46
< -6>		.....	47
< -7>	,	.....	47

<	-1>	.....	4
<	-2>	.....	5
<	-3>	.....	6
<	-1>	.....	37
<	-2>	.....	38
<	-3>	.....	39

1

1.

- , , .
- : 4.8M/ T (1975) 3.0M/ T (1998)
- 1994 UN .
1999 2 , .
.
- .
2 10 .
- .
- , , , .
- , .
- , .
- .
가 가 , , .

2.

○

- : 가 가
- : 1999. 6. 28 7. 10(13)

○

- , , (FAO,
-)
-
- (KIET, KIEP)

○

-
- ()

2 .

1.

1)

- , < -1> 가
- 9 , 20 가
- 3 가 가 .
- , 300 . 가 3
- 6
- 170 ha 가
- , .¹⁾
- .
- Rocan , Kampar , Musi , Indragiri ,
- .
- Kapuas , Mahakam
- .
- Mamberamo Digul .
- Kapuas , Mahakam

1) 가 11 2,970ha Toba .

4

< -1>



2)

○ 2) 3)

○ 가 , 가 가
가 (Kinabalu) .

2) 11 .
3) , 2 .

< -2>



3)

○ 가

○ .

○ .

○ (400km).

(200km) , 200 400km

6 .



< -1>

3

	11° 6° 91° 141°	1°30' 6°30' 100° 104°30'	8°30' 23°30' 104° 109°30'
	190 km ²	34 km ²	33 km ²
	○ ○ : 9 3 ○ : 4 8 ○ : 26 ○ :2,000mm	○ ○ : 21 32 ○ :2,540mm	○ - : 16 - : 27 - :1,730mm ○ - : 10 3 - : 4 9 - :2,000mm
	○ 27 ○ :17,508 ○ , 7,133	○ ¹⁾ ²⁾ ○ : 3,400km ○ ,	○ (Red River) ○ ○ : 3,200km

: 가 .
: 1) 134,680km²
2) 202,020km²

2. .

1)

○ 3 . < -2> .
○ GDP 1990 7.2% 1993 -6.5% 1997
4.6% 1998 가 가 -15%

- GDP 3% (10.3%)
5% .
- 1973. 9. 18. ,
1 5 (1997) , , ,
, , 가 , ,
.
- 2)
- , , 1980 1
1995 GDP 1.5% .
- 1960. 2. 23. ,
(1962. 12), (1963. 1), (1988. 7) .
, , , , ,
, , , .
- 3)
- 80%가 , , , ,
, , 1998 380
2 .
- : , , 1994
GDP 9%, 15%
- : , ,
- 88 , 22.8 (1998)
- () 1,760 312.2
- : Dong (1 14,011 (1999.11))

< -2> 3 . (1998)

		○ 197.6 ○ 가 1.6%	○ 20.6 ○ 가 24%
		○ (45%), (136%), 300	○ , , 87%
			, ,
		Rupiah 1 = 6,770 ('99.11)	Ringgit 1 = 3,795 ('99.11)
		Dong 1 = 14,011 ('99.11)	
	G N P	913	669
	1 G N P	450	4,013
	G D P	- 15.0%	-4.8%
		11.0%	4.9%
		489	536
		273	438
		35	44
		41	33
			2

: 1) , 「 , 1999.

2) , 1999.

: 1) 1998

2) , 1998 9 .

3) , 1997 .

○ 3 가 1992 12 4) ,

, , , ,

.

4) 1993 11

3.

1)

(1)

- 1990 360 1996 470
4.65% 가 .
- 470 250 , 220
90% .

< -3>

3

	1)	2)	3)
()	470	10 ⁴⁾	200
()	413	35	72 ⁵⁾
EEZ	○ 270 km ² ○	○ 25 km ² - : 16 km ² - : 9 km ²	○ 100 km ² ○ ,
()	4,580 ⁶⁾	1,108	1,669
1 (kg)	19	30	13.5
()	1,893	235	856 ⁷⁾
GDP ⁸⁾ (%)	3	1.5	9

: 가 .

: 1) 1996

2), 3) 1995

4)

5), 6) 1997

7) 1998

8) , 1995 , 1994 .

(2)

- 1996 41 3 . 30
가 99% 59%가 , 24%
16%가 . 1% 30
- 1995 96
6% 가 .

(3)

- 270 km² .
- 5) .

(4)

- .
- < -4>

5)

135° 140°

60 70m

5° 10°
.

< -4>

(1997)

	(ha)		(ha)
	1,500		1,200
	300		3,200
	1,240		1,000
	1,250		1,200
	17,500		1,000
	500		2,000
	2,000	*	5,000
	2,000		

: Ministry of Agriculture-Directorate General of Fisheries, *Map of Business and Investment Opportunity in Fisheries Sector*, 1997-1998, Jakarta.

* :

(5)

○

(Ambon)

(Bitung)

○ 가

33 560

○

가 168

가 392

○

33

29

4

(6)

- < -5> 1985 239
5 1997 458 12 가
○ 가 ,
.

< -5>

:

	1985	1996	1997
	1,821	3,503	3,435
	269	336	412
	305	681	733
	2,395	4,520	4,580

: .

(7)

- 1996 370 . 1 1 1990
15.9kg 1996 19kg 가 .

(8) 가

- 1990 32 , 10 4 , 1996
59 6 , 18 9,300 .
○ , 가 16% ,
56% , 13%
.
○ 가 , 가 ,
27% , 53% .

- 1990 4,800 1996 1 4,800
20% 가 , (fish oil)

2)

(1)

- 1995 10 . 8 2
1 8
1.2% .
- 1995 6 가
- 1997 1 8,410 , 7,545 가

(2)

- 가 1983 2 6,691 1992 3 2,550 , 1995
3 4,906 가 .
- 1980 20 .
- 1995 가 3 4,906 51% 1 7,980
가 572
가 2% .
- 1995 가 (fishing gear) 2 9,152 , 1994
2 5,856 12.8% 가 . 19%,
6%, (hooks and lines) 8.5%, 57% .

(3)

- 1984

25 km² .

- 16 km²,
9 km² .

(4)

- 77% 가 (cage culture)
- 1980 314 가 413 .
가 1989 207,678m² 575 가
1,895 .
- 가 , , , , .
- 가 , , , .
- 가 (Seabass) .⁶⁾
- - : (Aquaculture Extension centre) (Perak)
(Enggor)
 - : (National Prawn Fry Production and
Research Centre) (Kedah) (Kampung Pulau
Sayak)
 - : 가 (Terengganu) (Tanjung Demong)

(5)

- () , . , 가
.

6) 가 가 가 가 .

(6)

- 1995 81 9
52 9 , 29 .
- 1995 28 9 가
26 6 , 2 3 .7)
- 1974 73 4 1984 88 2
, 1994 105 3 가 , 1995 110 8
1994 4% 가 . 1995 89%
, 10.7%, 0.3%
.

(7)

- .
- .
- 2/3
1 30kg .

(8)

- 1995 24 7 (8 9,220) 26 (8
2,840) 63 8 .
- 1995 (9 6,652), (1 7,226), 가
(3 2,447), , , , .
- , 70%
(51%).

3)

(1)

- 1995 200 , 80
40 .
- 9% . 92%
, 가
- 1991 26 15%
.

(2)

- 1996
, 1996 7 1,500 18 5
45 가 .
- 100 , (),
.
가 .

< -6>

: ,

	1980	1985	1990	1995	1996
	29,584	29,323	41,266	68,000	71,500
	454	495	724	1,500	1,850

: .

(3)

- 100 km², 112
- (Bac Bo Gulf),
(Gulf of Thailand)
- 4 가, 30 ha
21
- 80 ha, 250 300kg 가
- 가
- 가

(4)

- 400 115

(5)

- 1997
- 26 (80 800).
- 1997 150
- 가, 1996 134

(6)

○ 1976 80

1981

○ 1990 100 1998
167 113
(67.7%), 54 (32.3%)

< -7>

:

	1980	1985	1990	1995	1997	1998
	398,743	576,860	672,130	928,860	1,078,000	1,130,660
	160,000	231,150	306,750	415,140	492,000	537,870
	558,743	808,010	978,880	1,344,000	1,570,000	1,668,530

:

(7)

○ 가

, 60 70%

○ 1 1960 18 19kg 1991 93

13.5kg .⁸⁾

○ 가 ,

8)

1
6 10kg,

20 60kg
8 9kg .

2 3kg,

(8) 가

- 가 1998 234
가 . 186 20
- , , , HACCP⁹⁾
60 HACCP .
- , EU, , 가
49
- 1980 1,100
1990 2 500 , 1998 8 5,600 .
-

9) HACCP Hazards Analysis Critical Control Points

3

가

1.

1)

(1)

○ 1997

380 5 62%

612 3 ,

.

< -1>

(MSY)

: , %

	6,123	3,805	62
	3,177	1,415	45
	977	364	37
Tongkol Tenggiri	219	78	35
	374	128	34
	205	111	54
	127	32	25
	27	8	30
	9	3	33
	16	5	32
	1,786	1,087	61
가 Carrangids	74	70	107
	5	2	46
	76	93	122
	28	22	79

: .

< -2>

:

○	118	176
- 가	75	32
	104	104
○	160	55
	113	504
	463	444
○	-	-
	215	215
	-	57
	43	44
○ .	72	71
/	75	238
	21	386
	5	25

: .

(2)

- 30 43 ,
21 4 . 5 5,549 ,
11 4,867 , 1 7,960 .¹⁰⁾
○ 1992 93
(16 , 9) (Yahaya 1993),

10) 1995 .

58 8 32
2 , 26 6 (Hamid, 1997).

< -3> (1998)

:

	157	87	20	67
	68	34	2	32
	872	327	19	308
	50	25	-	25
	1,147	472	41	431

: (Fisheries Research Institute Sarawak Branch).

< -4> (1998)

:

	157	87	20	67
	68	34	2	32
	872	327	19	308
	50	25	-	25
	1,088	435	18	417
	40	20	2	18
	50	25	-	25
	1,506	670	115	555

: < -3> .

(3)

- 2 2/3
50m
300 350 , 130 .
- 1995
가
가
○ bonito
10 . 2000
100 가 50m

2)

(1)

- 2 (1993 2018) 7 5 (1999 2003)
3 .
- (, ,)
- (fish meal)
-
- , .
- : 458 (1997) 606 (2003)
- (: 495 , : 111)
- : 16 8 (1997) 26 4 (2003)
- 가 : 2 6,636
- 가 : 76 4

○

-

< -5>

(1999 2003)

:

(Type of Fishing Fleet)		1999	2000	2001	2002	2003
50 100 ()	410	90	80	80	80	80
30 ()	527	105	105	105	105	107
30 50 ()	318	63	63	63	63	66
30 ()	9,969	2,000	2,000	2,000	2,000	1,969
30 50 ()	1,399	250	250	300	300	299
100 200 ()	812	160	160	160	160	172
400 600 ()	51	11	10	10	10	10
10 30 ()	6,600	1,320	1,320	1,320	1,320	1,320
10 30	5,040	1,040	1,000	1,000	1,000	1,000
3 5	1,510	400	300	300	300	210
	26,636	5,439	5,288	5,338	5,338	5,233

:

.

○

-

-

-

.

.

○

가

-

-

.

-
- (DGF)
- (provincial fishiers service) 27
- 가

-
-
-
-
-
-

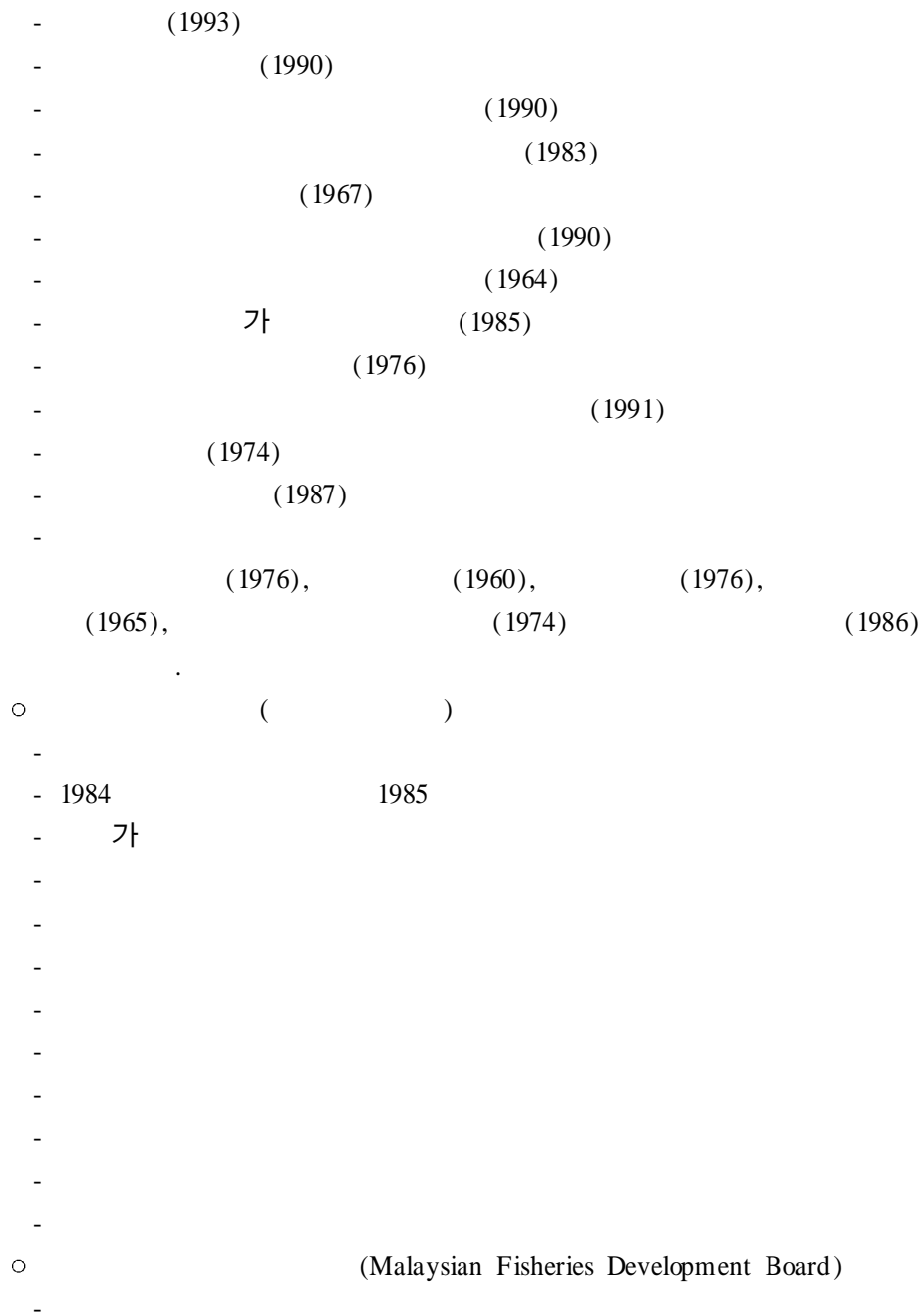
(2)

- 가 (National Fishery Development Plan)
- 가 (1992 2010)
- , ,
- ¹¹⁾ (Deep Sea Capture Fisheries)

-
- 1981 가
-
- 가 가
- .

11) (Deep Sea Area) 30 200 .

-
-
-
-
-
- 가
- 가
- ()
- :
- A (5) :
- B (5 12) :
- C (12 30) :
- C2 (30) : C
- 가 (TAC) 70
-
-
-
-
- 가
- , , 가
- Pentanak Central Market
- , 가
-
- (1984)



○
- (State Economic Planning Unit)

- , , ,

○
- 3
- 3

○
- : 1970 1980
- : , 가

○ 1970 1980 UNDP FAO (SCSP)
, 1980

○ 1980 1990 ASEAN-USAID
,¹²⁾

(3)

○ 5 (1996 2000)

○ 2000 170 , 2005 200 , 2010
240

○ 2000 11 , 2005 20 , 2010
27 30

○ 2000 340 , 2005 400 , 2010 440

12) FAO, UN, IMO, ESCAP

< -6>

	2000	2005	2010
()	1,700	2,000	2,400
	1,020 680	1,200 800	1,200 1,200
()	11	20	27 30
()	3,400	4	4,400

:

○

-

-

○

- 45

- 45 60

- 5 7m

- 90

-

-

-

-

-

○

-

- 가 ,
-
-
- :
- , 가

○ 가

- HACCP 가 . 2000

- 가 ,
- 가 가 .
- EU, ,

○

-
-
- 가
-
-
- , , (1977)
- (1980)
- (1990)
- (1990)
- (),
- (1991)

○

- 1976 ,
- 20 ()

-

· .

- 가, ,
- .
- .
- .
- (RIMP :
Research Institute for Marine Products) ,
- , 가 ,
- .
- (Fisheries Economics and Planning Institute)
- (3) , ,
- .
- ,
- , , 가 40m
- , , 가
- , 가,
- 2 가 11 가
- , ADB
- , 가
- 100% 가
- 가

3) ()

(1) ()

○ < -7> .

○ 가
가
가 .

- 1996. 12 “ ”
2000

< -7> 3 ()

	가	가	가
	○ 100 가, 10 ○ 가 - 5 : 0 3 - 25 : 3 7 - 100 : 7 12 ○ : ○ - 1 : 50% - 1 : 5	○ 70 ¹⁾ ○ 30 ²⁾ ○ ○ VTMS() ○ ○ ³ 10 20%가	○ 5 - - - 가 ○ 가 - , 가 - 가 , - 가

: FAO

: 1) : × × ×0.283

2) 30

. , 가 12 .

- 가 .
- 가 3 ,
- 가 가 1 ,
- 가 .
-
- 134 290 ,
- : 500 1 +
- : (G/T) 3
- : 100
- : (m³ 86) (m³ 107)
- 1 50%, 1 5
- 1 200 가 (6) .
- , 20%
- 5 40%, 10 51% .
- 가 가 가
- 가 , 가 가
- (local company) .
- () 가
- (
-) ,
- .13)

○ < -8>

.

< -8>

	○ 3 , 4 ○ 1
	○ - - , 1 1) , ○ - 가 : 2 5 - : 5 1 - : 3 7 - : 2 5 - : lha 1 , lha ha 1 2 - : 500 2 - : 500 2 - : 3 6 - 30

: .

: 1\$ = 14,011 ('99.11).

(2)

○ , , , , 가 .
 , 가 , , ,
 ,
(< -9>).

가 .

< -9>

3

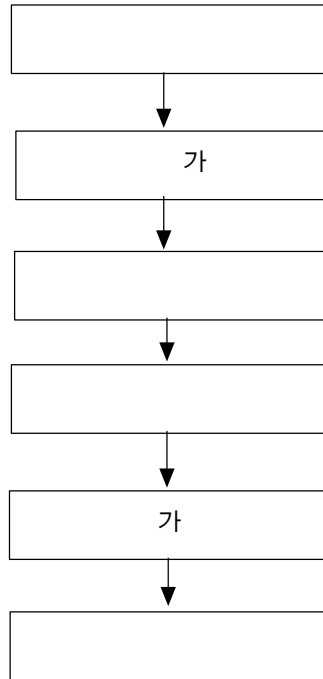
	0 - , , , , 0 - - 가 .
	0 (,) (, ,) 가 가 가 가 0 가 0 - : , - : , , (seabass) .
	0 , , 0 ,

: .

(3)

- 3 < -1>, < -2>, < -3>
- .
- 가 가 ,
- 가
- .
- 가 가 .
- .

< -1>



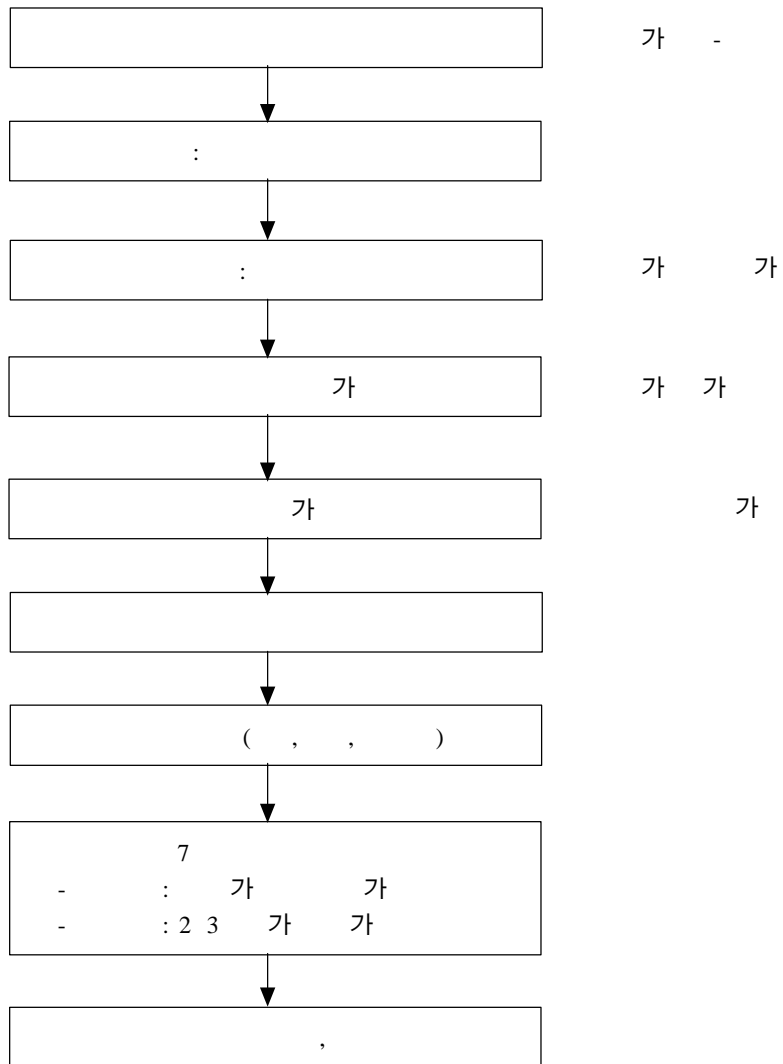
-

-

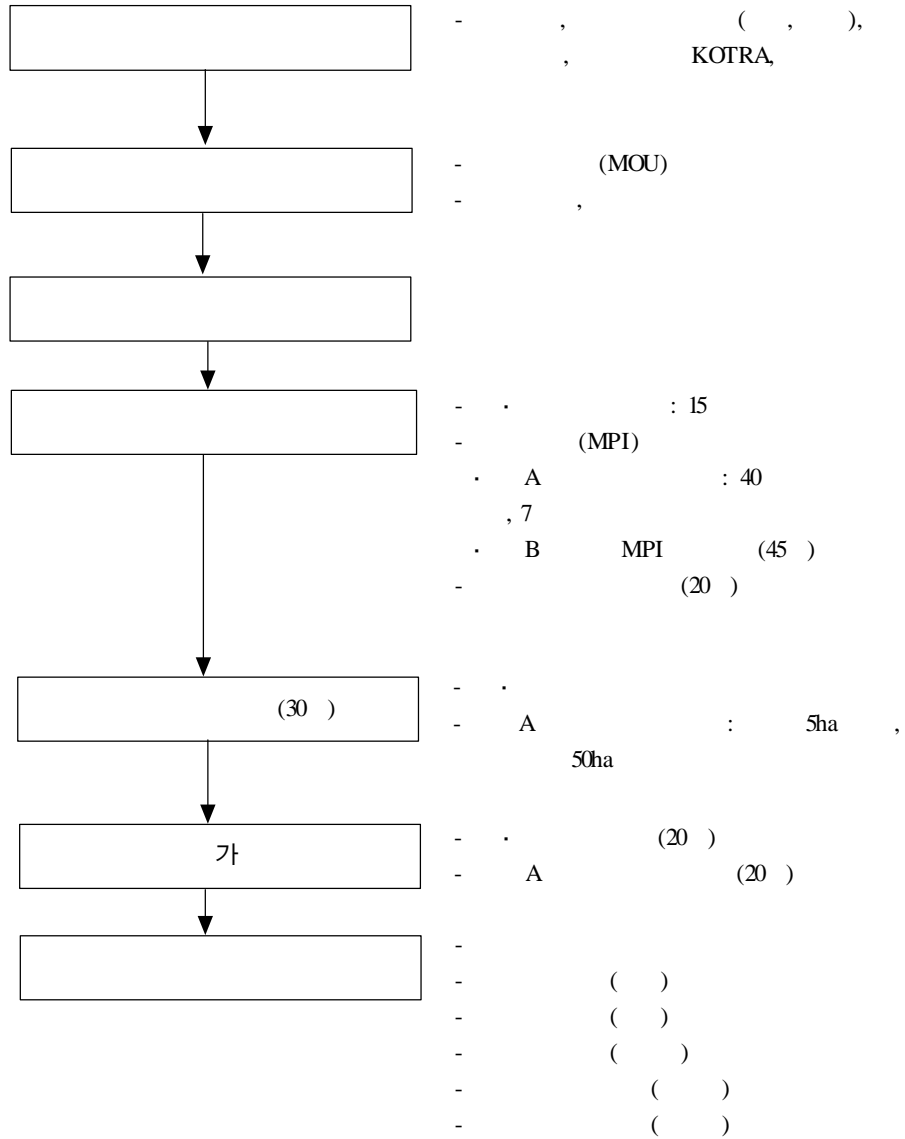
-

-

< -2>



< -3>



2. 가

1)

○

()

-

, 2

가 가
가

○

, 가

가

-

-

○

2000

가 가 .

○

가

,

,가

가

가

.

2)

○

()

가

(

)

.14)

○

.

14) 1999. 7. 3

- 가 ,
가 ()
- 가 .
가 ()
가 가 , 가

3)

-
- 가 ,
- 가
- .
- .

가 , 가
가 .

4

1.

1)

- 1967 12 10
- 1987 7 3 가
- 15) 가 1994 73
- .
- 가 , IMF
- 가 .
- ,
- .
- () ,
- 가 가 가
- 가 .
- .
- 1998 , 53
- 1998 (146)
- .

< -1>

1967 12	10 ()
1987 7	3 (")
1994	73 (")
1998	53 (")

○

·
- , (12)
1 (10)
가 IMF 1 ,
·
○ 1995 65
3 5,124 1998 53 1
6,557 (< -2>).
- 가 35%, 가 15 %
- , , 가 , ,
- (100 170) (300 350)
·

< -2>

: ,

	1995	1996	1997	1998
	35,124	24,544	19,448	16,557
	65	57	55	53

: .

2)

- 1969 71 90 6
- 1977 120 2 .
- :
- : 1977. 4. 1 1977. 9. 30
- : 125
- : 1.7 (2.5, 0.8)
- : , , , 가
- 1999 2
- .
- 가 2 1 1999 5 1
- 1 8 , 10 ()

< -3>

1980	1969 71 6
	1977 2
	1978 2
1999	1

3)

- 1988 96 5 9 , 가 , , ,
- , (, , ,) , 1996 635

- 2 가 .
- , < -4> < -5>
- 가 , () ,
Bright Sea Co. Ltd. .
- . , 80 6
31 2 (39%), 49 4 (61%)
- 1998 11 1999 가
- 227ha 20ha, 27ha

< -4>

	Seaprodex	1988. 3. 8
	Sowes Food	1988. 6. 5
	Southwest Fishing Service Corporation	1993. 3. 15
	Institute of Marine Product Research	1990. 8. 28
		1992

: .

< -5>

	2 (140 150)	2 (110 130)	2 (160)	1 (239)	2 (635)
	1988.6.10 9.12	1988.8.20 12.31	1989.7.20 8.27	1991.1.28 2.11	1992. 1996.4
()	35	73	14	15	-
()	20	44	21	1.5	541(1992) 766(1993) 149(1995)
()	0.29	0.30	1.5	0.1	-

: .

2.

1)

(1)

○ 가 ,
, , , (< -6>).
- ,
- 3
. 가
- ,
- .

가 .

○ (100G/T , 10

)

. 가 .

○

(, ,)

가 .

○ (Counterpart)

(Indonesian Fisheries Federation)

가 .

○ 가 30

() 가 (

가) 가 .

< -6>

	:
	:
3	
	: , . 가
	, 가

< -7>

,

	216	68	-	461	255	-	1,000
	1,637	1,597	1,183	57	21	76	4,571
	351	142	-	-	-	-	493
()	2,204	1,807	1,183	518	276	76	6,054

:

(2)

- , 가 가 .
- (agent) ,
- , 가 .
- (permit) 가
(National Fishermen's Association), (Fisheries
Development Authority of Malaysia), (Sarawak
Economic Development Corporation) .
- 가
() ,
- 가
- 가 .

(3)

- (500m) .
- .
- 가
가 .
- 가
가 .
- 가
 .

○ , ,
 , 가 .
 -

2)

(1)

○ , ,
 .
 ○ 가가 가
 가 .
 ○ 가
 .

(2)

○ 가
 가 .
 ○ 가,
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(3)

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1 가 .

- 2 3 .
 - a.
 - b.
 - c.

- 3 (1) 2 a 6 .
 - (2) (1) 3 .
 - a.
 - b. 3 6
 - (3) (2) a 3 .
 - a.
 - b. 가
 - c. 10m
- (4) (2) b 3 6

a. 가

b. 1. 10m

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a. 60G/ T

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1. 350G/ T

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PART V FOREIGN FISHING VESSELS

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16 (1) (2) (3)

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- 19 (1) a) 가 .
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- (2) 21 가 1 ,
- (3) (1) b) 가
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21 (1) 가 .

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- Indonesian Association of Fishery Processors
Phone : 62-21-3907001 Fax : 62-21-3908863
- Indonesian Frozen Seafood Processor Hotanjaya Graha
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- PT. Latoka Minaraya
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- Pengurus Besar, Pangkas Sea Produc Sdn. Bhd., Lot 189, 2 ½ Mile Ram Road, 98000 Miri. Fax No. 085-411741

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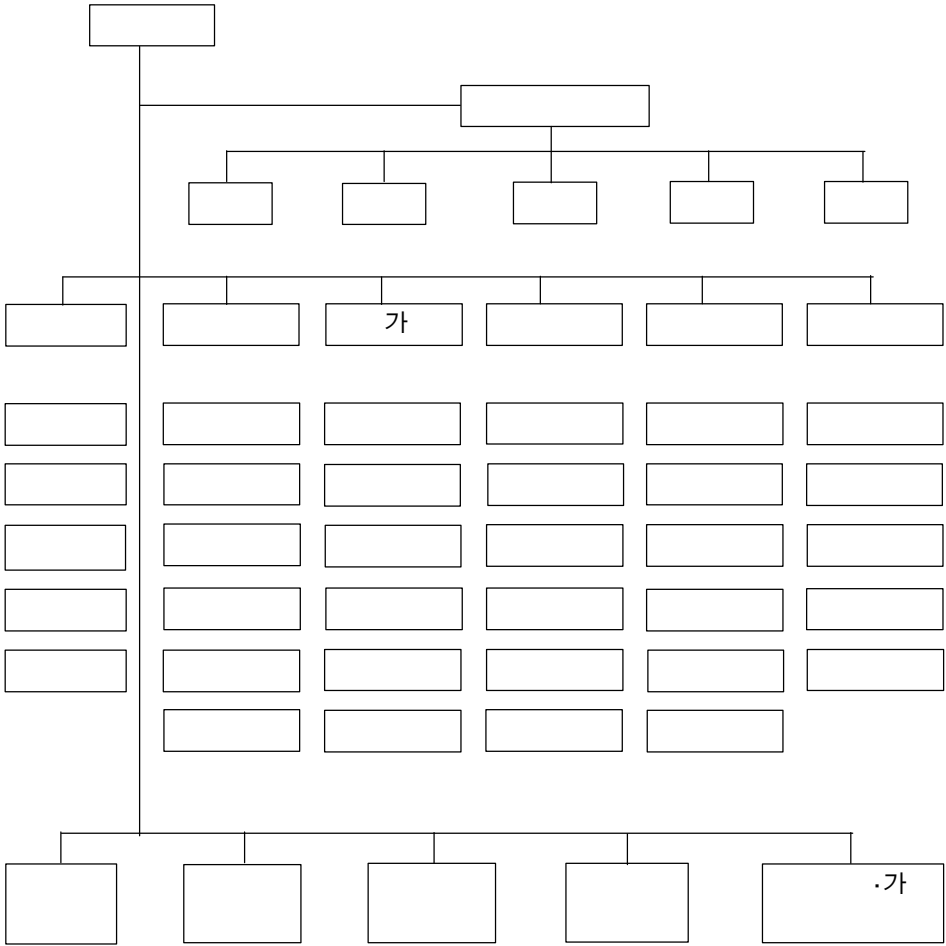
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- Tien Giang Fisheries Department
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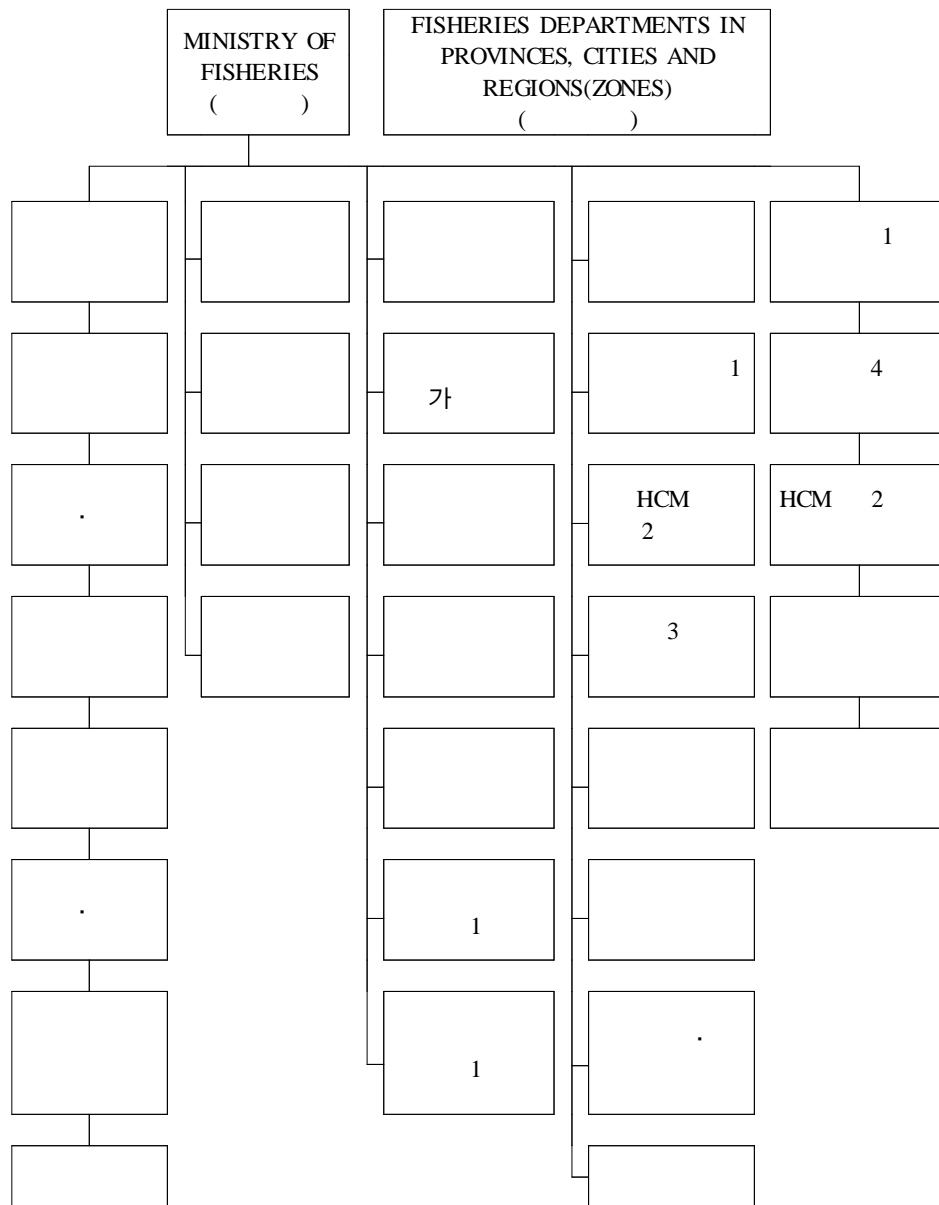
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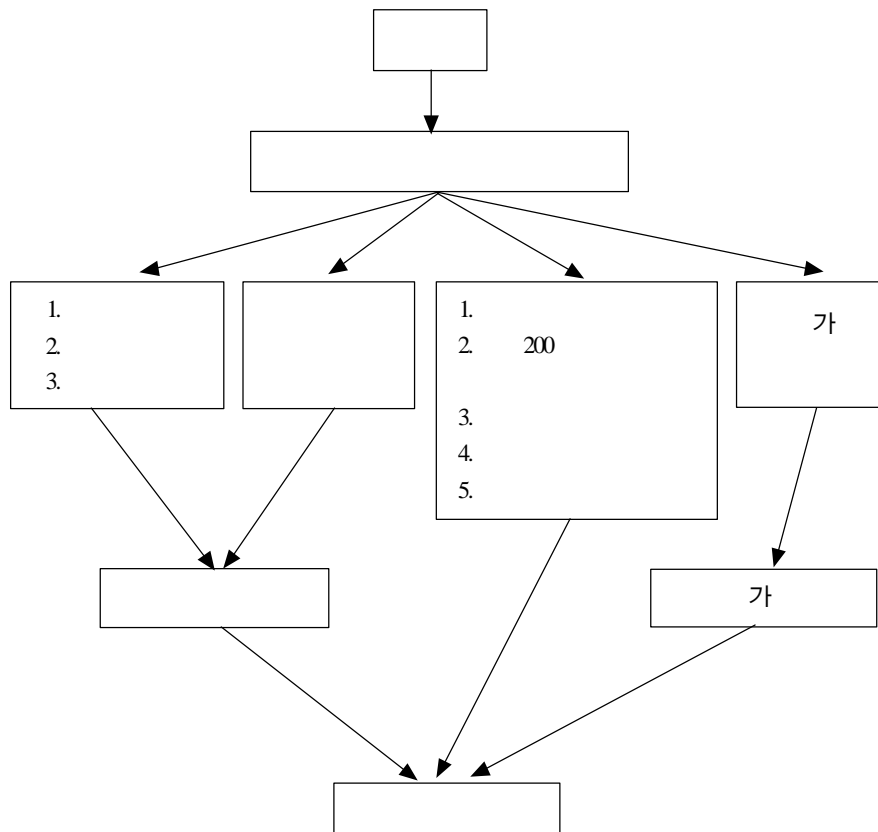
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