


Philippine Fisheries Status: An Overview

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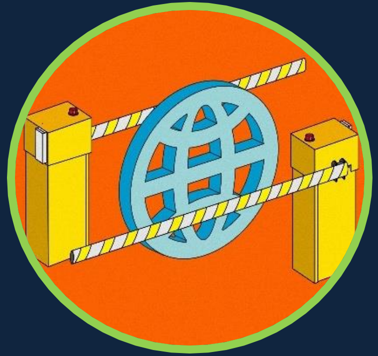
PHILIPPINES

FAO Regional Workshop on Opportunities and Challenges in Economic and Post-harvest Issues Related to Market Access for Fisheries and Aquaculture Products in Bali, Indonesia from 1 to 3 October 2024

Outline

Philippine Fishery Resources and Management

Fisheries Production and Trade Performance



Trade Opportunities and Challenges

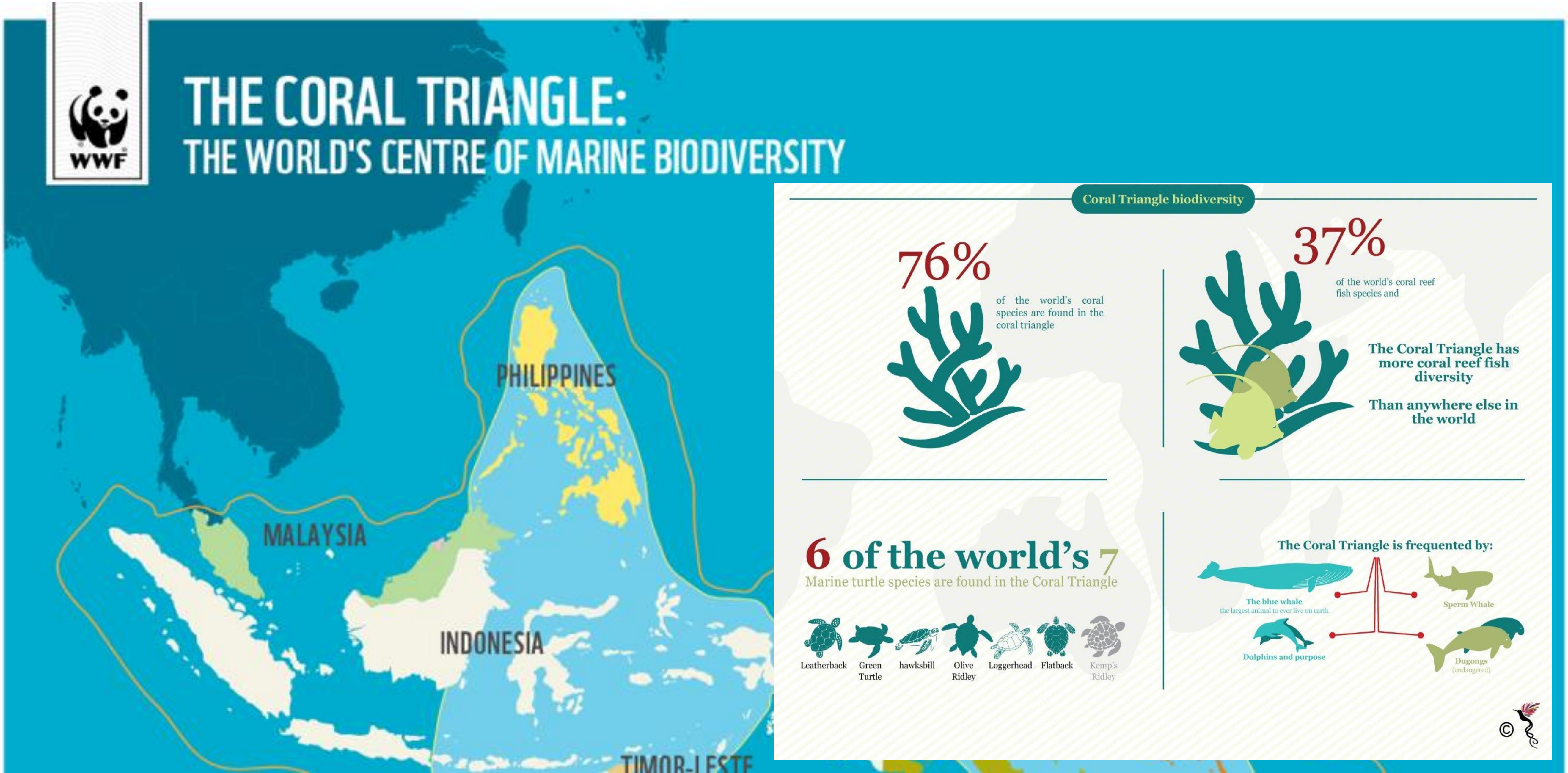
At a Glance: The Philippine Fishery Resources

The Philippine waters cover **220 million hectares**

7x bigger than the total land area

Sits in the **Coral Triangle** which has the richest marine life in the planet

At a Glance: The Philippine Fishery Resources




Shelf area: 18.46 million ha
Coral Reef: 2.7 million ha
Coastline: 36.3 km
Fish ponds: 254 thousand ha
Other inland resources: 250 thousand ha
Swamplands: 246 thousand ha

FMA

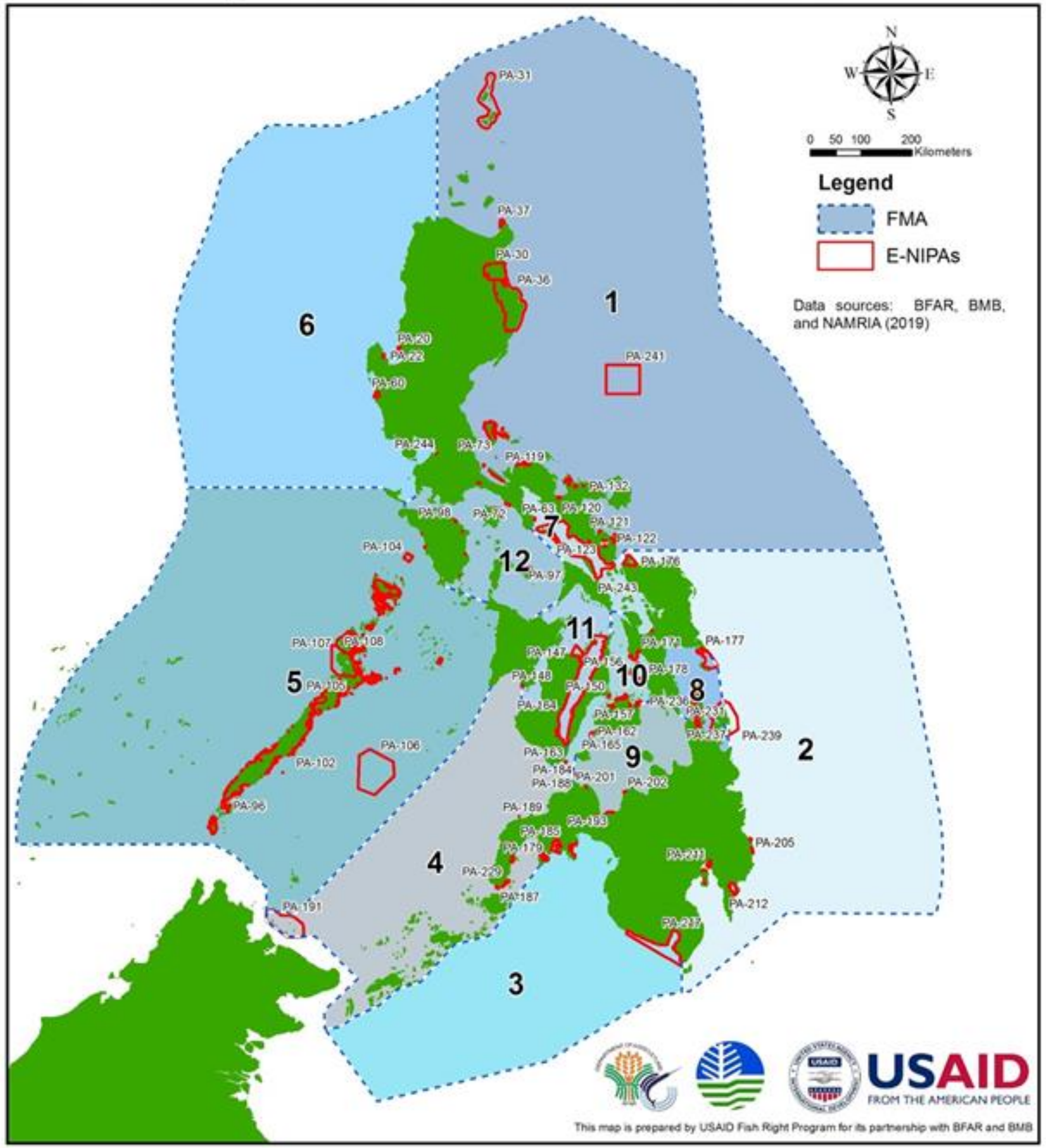
FISHERIES MANAGEMENT AREAS

12 **FMAs** nationwide

Implementing science and rules-based fisheries management measures

Fisheries Administrative Order (FAO) 263 s. 2019

Fisheries Management Areas and E-NIPAS Protected Areas

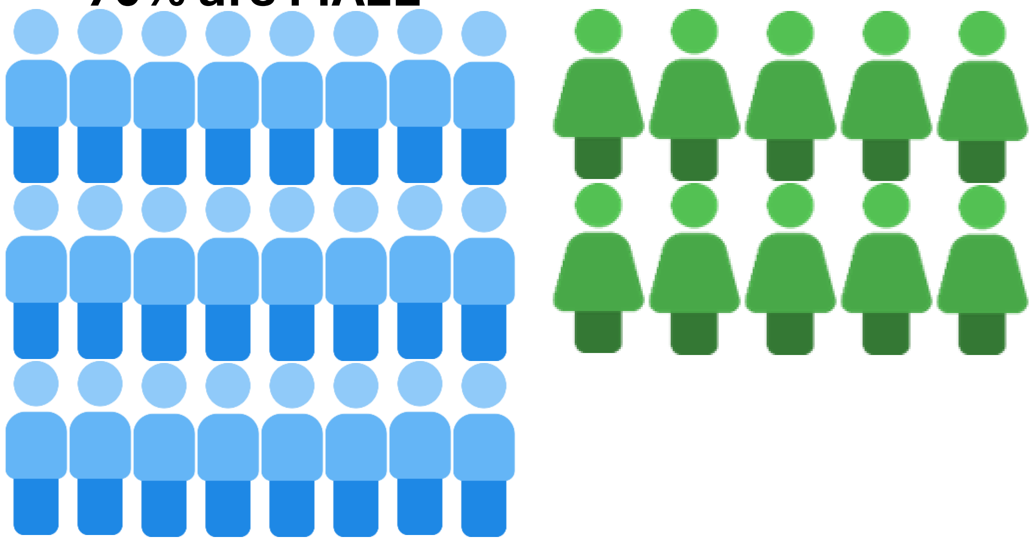


The Philippine Fisheries Sector: In Numbers

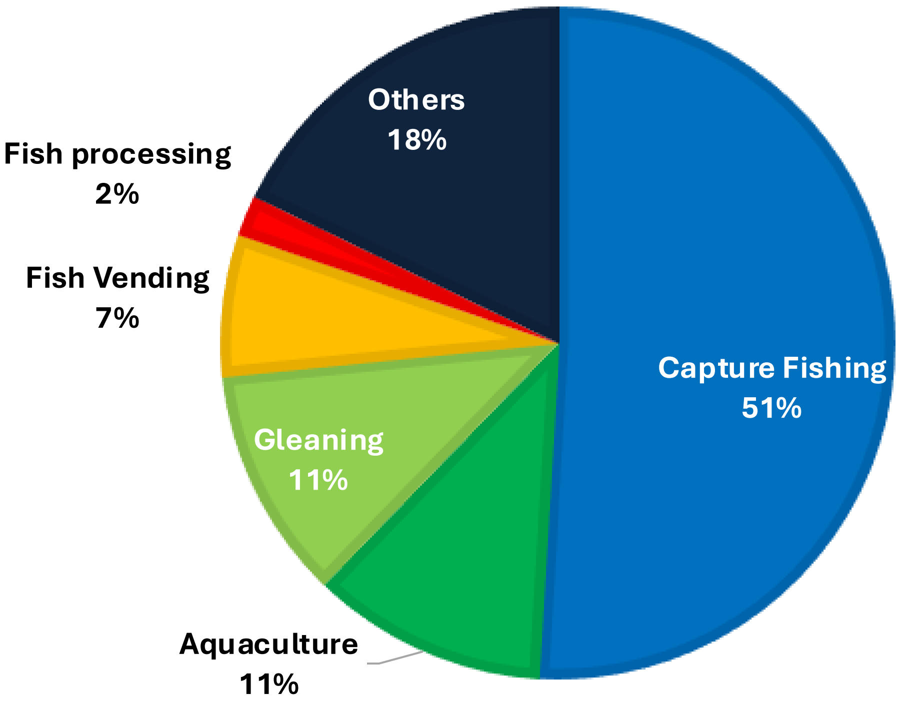
Total number of registered fisherfolk (2022) is 2,302,648.

1.9 M are small-scale fishers

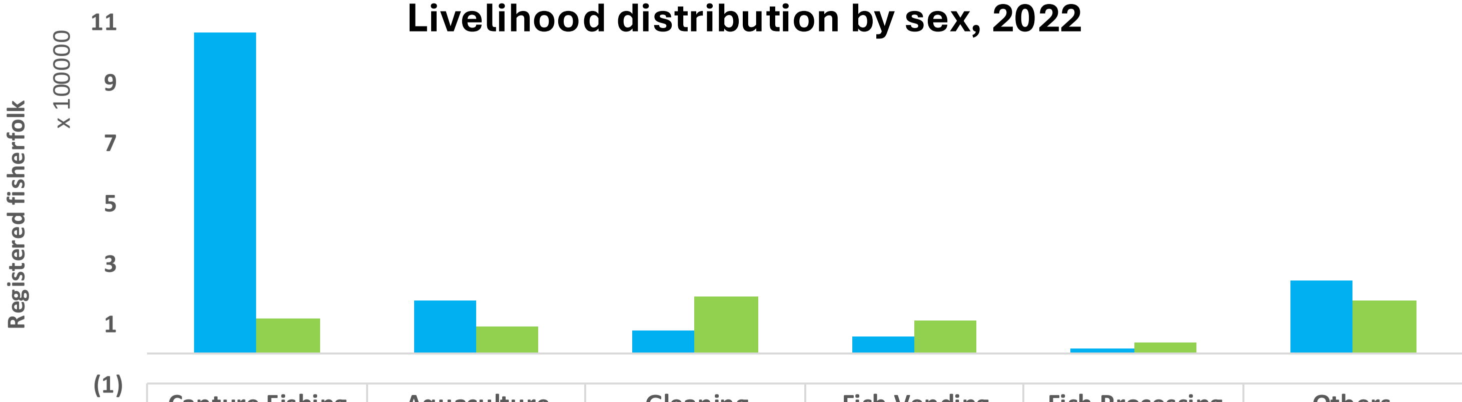
70% are MALE **30% are FEMALE**



REGISTERED FISHERFOLK BY LIVELIHOOD, 2022

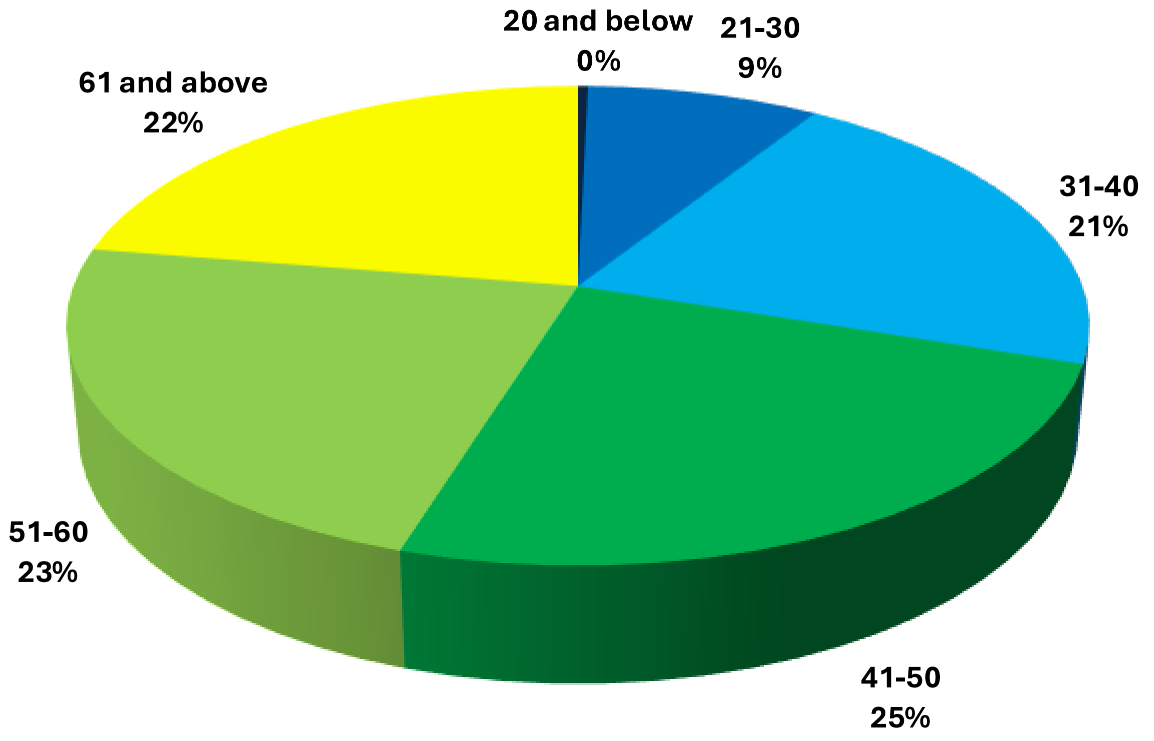


Livelihood distribution by sex, 2022



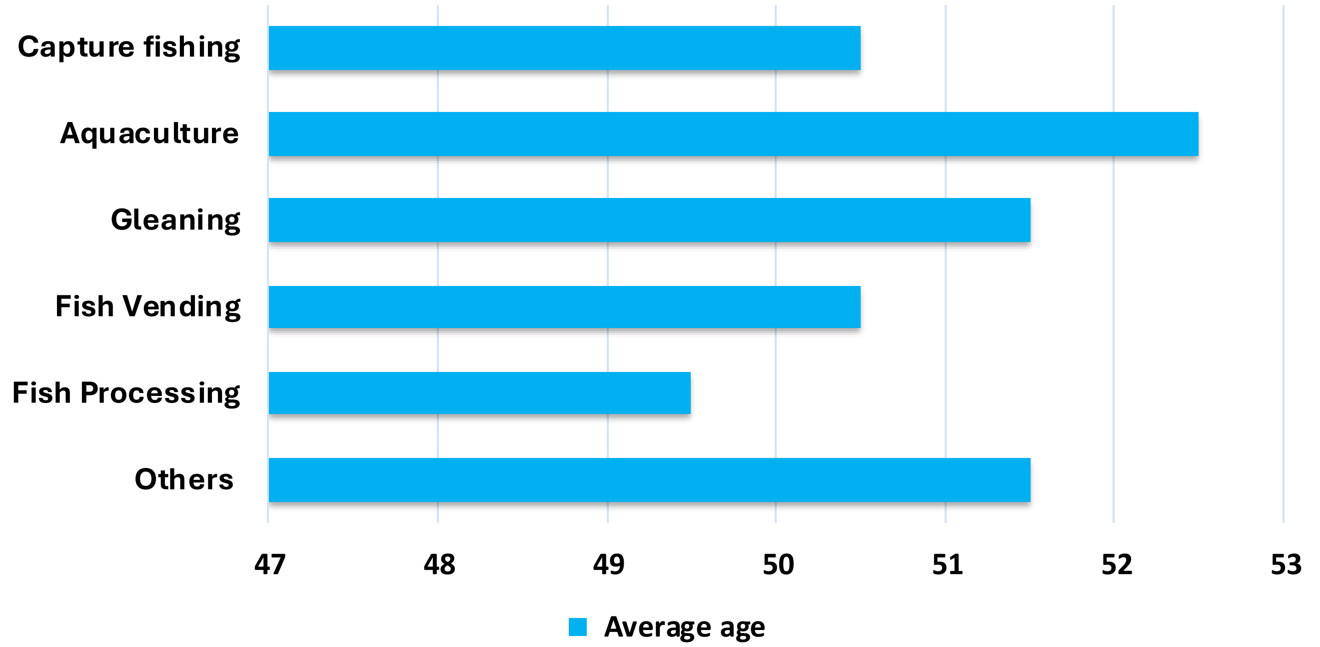
	Capture Fishing	Aquaculture	Gleaning	Fish Vending	Fish Processing	Others
Male	1,063,104	173,576	74,161	50,310	13,428	237,055
Female	110,277	85,872	183,350	106,851	31,720	172,944

Source: Philippine Fisheries Profile, 2022



The age distribution of registered fisherfolk indicates that most individuals engaged in fishing activities in the country in 2022 are aged 41 or older, accounting for 69.87% of the total number of registered fisherfolk. Youth fisherfolk or those belonging to the 21 to 30 and 20 and below age brackets only comprised 9 % of the fisherfolk population. The remaining 21.13% constitutes the fisherfolk aged 31 to 40 years.

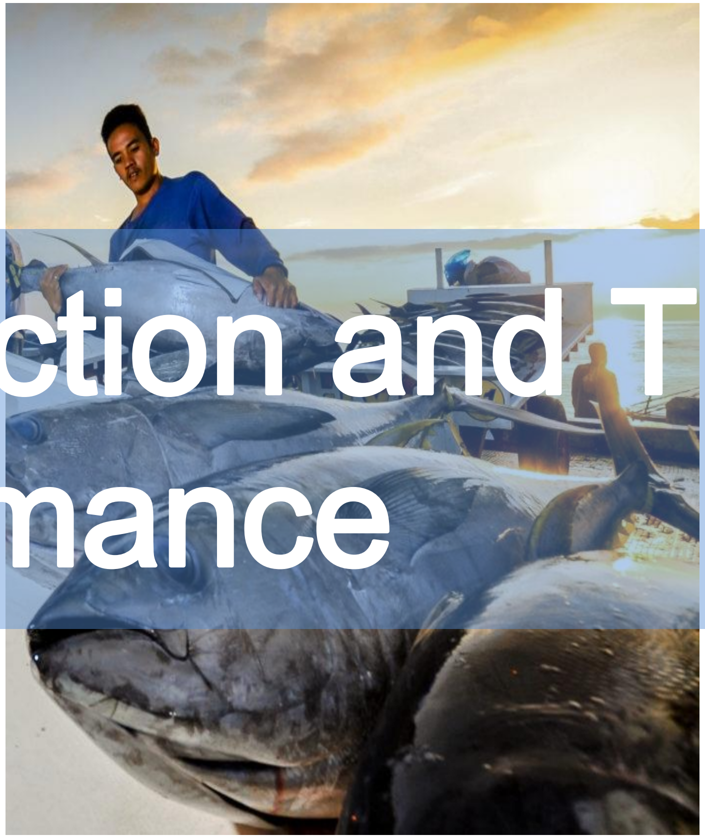
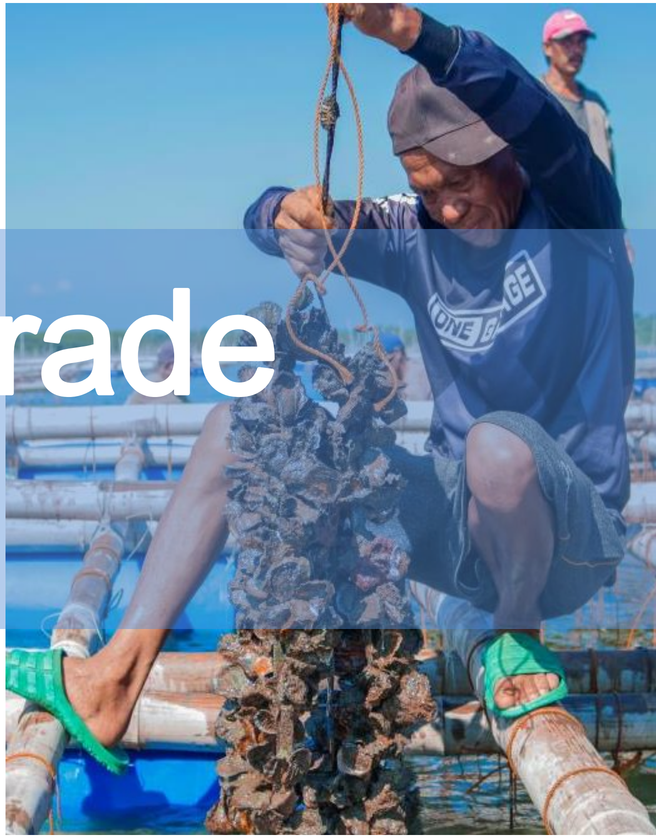
Source: Philippine Fisheries Profile, 2022



The above graph shows that the fisherfolk engaged in various fishing-related livelihood were 51 years of age, on average. Notably, aquaculture generally involved individuals of slightly older age, with an average of 52 years old. Conversely, fish processing had a relatively younger age, with 49 as the mean or most occurring age, while fish vending, gleaning, and capture fishing activities demonstrated greater consistency in their average age, clustering around 50 to 52 years in most regions of the country.

Fisheries Production and Trade Performance



TOP 5 PRIORITY AQUACULTURE COMMODITIES

***Objective:** To gear up the Philippine Aquaculture Industry towards sustainable, globally competitive, climate-change resilient, adaptive to smart technology production.*

National Milkfish Industry Roadmap 2021-2040

National Seaweed Industry Roadmap 2022-2026

National Shrimp Industry Roadmap 2021-2040

National Tilapia Industry Roadmap 2022-2025

National Shellfish Industry Roadmap 2021-2040

Top Produced Commodities

Table 15. **Top Commodities in terms of Production Volume, 2022**

Commodity	Volume *(MT)*	Value *('000 PhP)*
Seaweed	1,544,959.98	16,600,713.39
Tuna[1]	475,313.47	54,317,559.12
Milkfish	390,098.30	46,586,951.05
Sardines[2]	336,171.88	12,781,256.34
Tilapia	303,953.10	25,965,935.61
Roundscad	172,268.17	16,934,618.77
Big-eyed scad	112,743.91	12,646,930.16
Shrimp[3]	87,004.51	29,056,531.09
Mackerel[4]	74,815.47	9,903,233.55
Squid	57,302.61	8,607,329.61
Anchovies	52,993.62	4,311,634.57
Shellfish[5]	51,945.38	1,424,842.61
Threadfin Bream	33,973.38	5,373,593.25
Slipmouth	33,920.45	2,939,328.21
Blue crab	25,508.33	4,685,919.32

Data Source: PSA retrieved October 10, 2023

1 - Tuna includes Eastern little Tuna, Bigeye Tuna, Frigate Tuna, Skipjack, and Yellowfin Tuna

2 - Sardines includes Bali Sardinella, Fimbriated Sardines, Roundherring, and Sardines

3 - Shrimp includes Acetes, Endeavor Prawn, White Shrimp, Freshwater Prawn, Tiger Prawn, and P. vannamei

4 - Mackerel includes Indian Mackerel, Indo-pacific Mackerel, and Spanish Mackerel

5 - Shellfish includes Oyster and Mussel

Seaweed remained the top-produced commodity in volume at 1.54 million MT, amounting to PhP 16.60 billion. This was followed by tuna which contributed the largest share in terms of value amounting to PhP 54.32 billion. Milkfish, sardines, tilapia, roundscad, and big-eyed scad were also among the top commodities with the highest production volumes, with each contributing more than 100,000 MT to the total fisheries production.

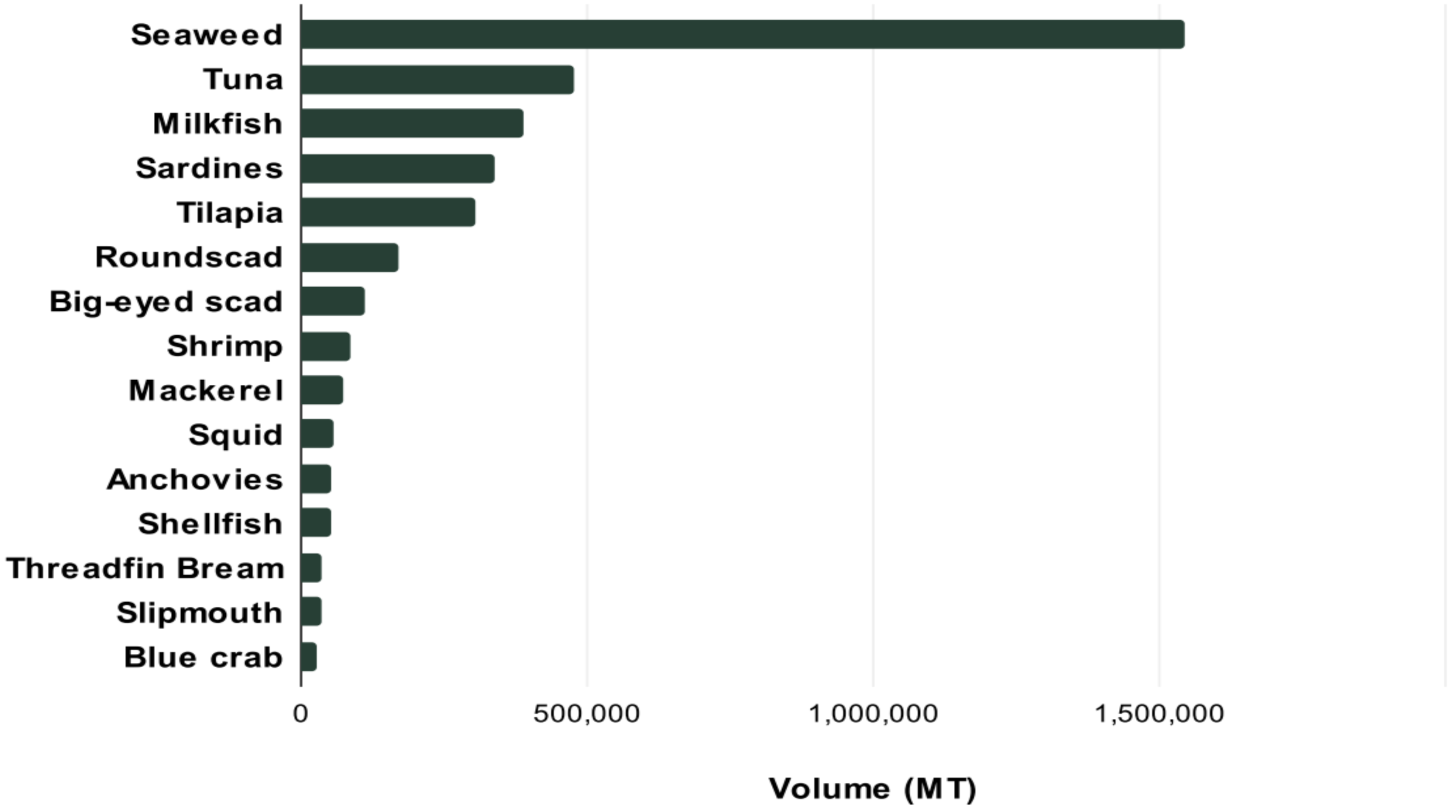


Figure 17. **Top Commodities in terms of Production Volume, 2022**

Source: Philippine Fisheries Profile, 2022

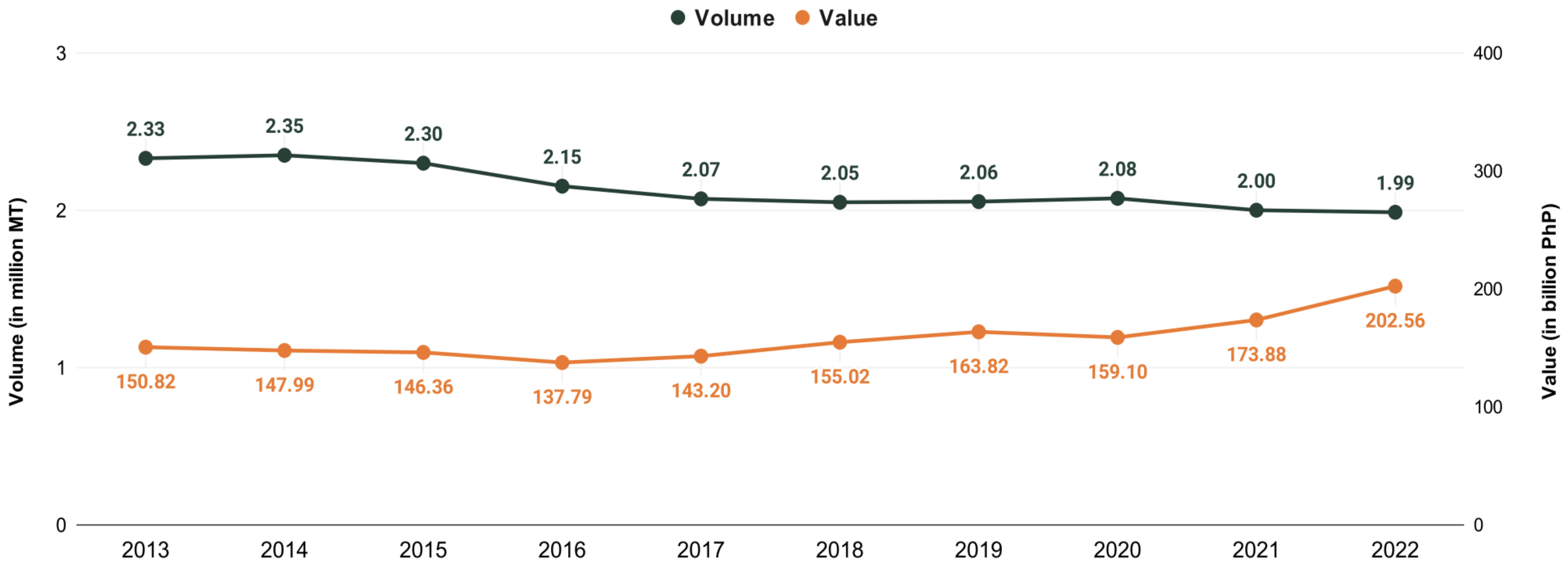


Figure 28. **Volume and Value of Capture Fisheries Production, 2013-2022**

The capture fisheries experienced a downward trend in production volume during the first half of the ten-year period. Production then had a gradual increase in 2019 and 2020, which eventually declined towards 2021 and 2022, resulting in a reduction in production from 2.08 million MT in 2020 to 1.99 million MT in 2022. In spite of consecutive declines from 2021 to 2022, the sub-sector still managed to register a substantial value of PhP 202.56 billion in 2022. Furthermore, a general upward trajectory in production value was observed except in 2020 and 2016, where the sub-sector recorded the lowest value in the last ten years amounting to PhP 137.79 billion.

Source: Philippine Fisheries Profile, 2022

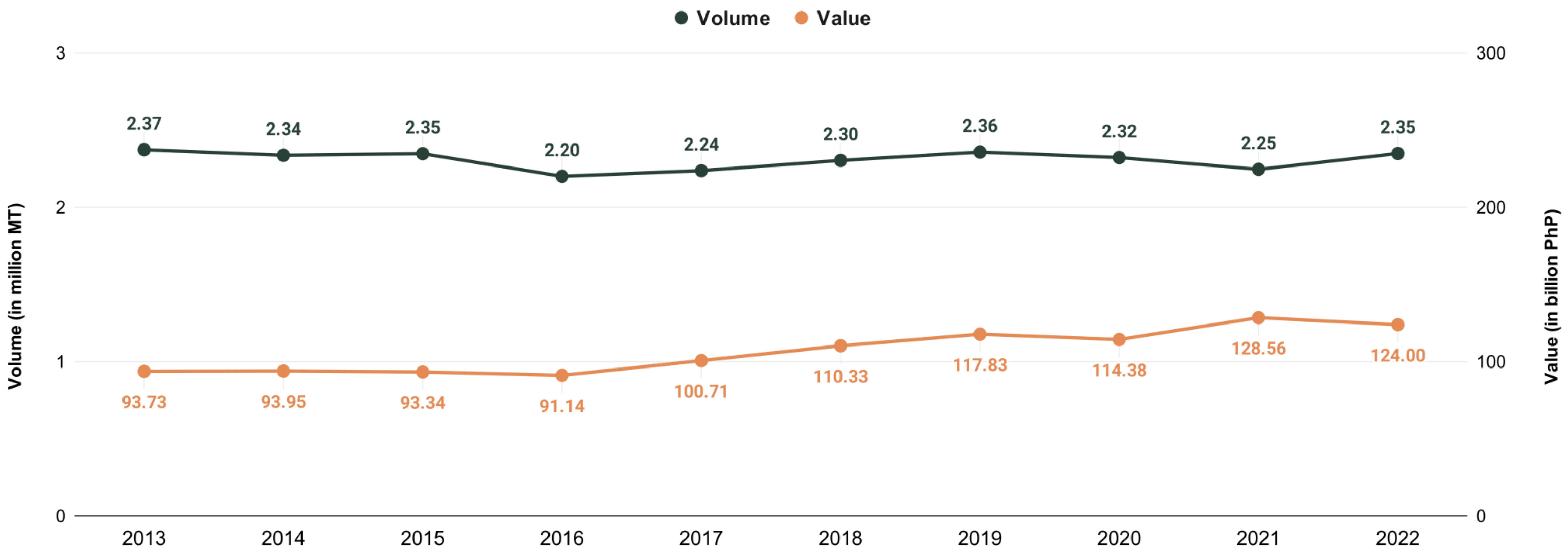


Figure 19. **Volume and Value of Aquaculture Production, 2013-2022**

The ten-year trend shows a stable volume of production in aquaculture from 2013 to 2015, which was not sustained in 2016 as production declined by about 147,247.86 MT. The sub-sector started to recover in 2017 towards 2019, as it reached its peak volume of 2.36 million MT, however, the production declined again from 2020 to 2021. In 2022, aquaculture production increased by 102,936.24 MT or 4.58% from the previous year.

The value of production followed the same trend as that of volume, as it also decreased towards 2016 but recovered in the following years up to 2019. Despite the decrease in the volume of production in 2021, aquaculture production value was still able to increase by 12.40%, reaching the largest value in the ten-year period with PhP 128.56 billion. However, the value of production decreased again in the following year to PhP 124.00 billion despite the 4.58% increase in the volume of production.

Source: Philippine Fisheries Profile, 2022

Fisheries Production by Sub-sector, 2022

Sub-sector	Volume *(MT)*	% Share to Total	Value at Current Prices *('000 PhP)*	% Share to Total
Aquaculture	2,349,252.01	54.15	124,002,547.45	37.97
Capture	1,988,946.58	45.85	202,564,986.40	62.03
Commercial Fisheries	*862,686.33*	*19.89*	*74,931,961.99*	*22.95*
Municipal Fisheries	*1,126,260.25*	*25.96*	*127,633,024.41*	*39.08*
TOTAL FISHERIES	**4,338,198.59**	**100.00**	**326,567,533.85**	**100.00**

Data Source: PSA retrieved July 21, 2023

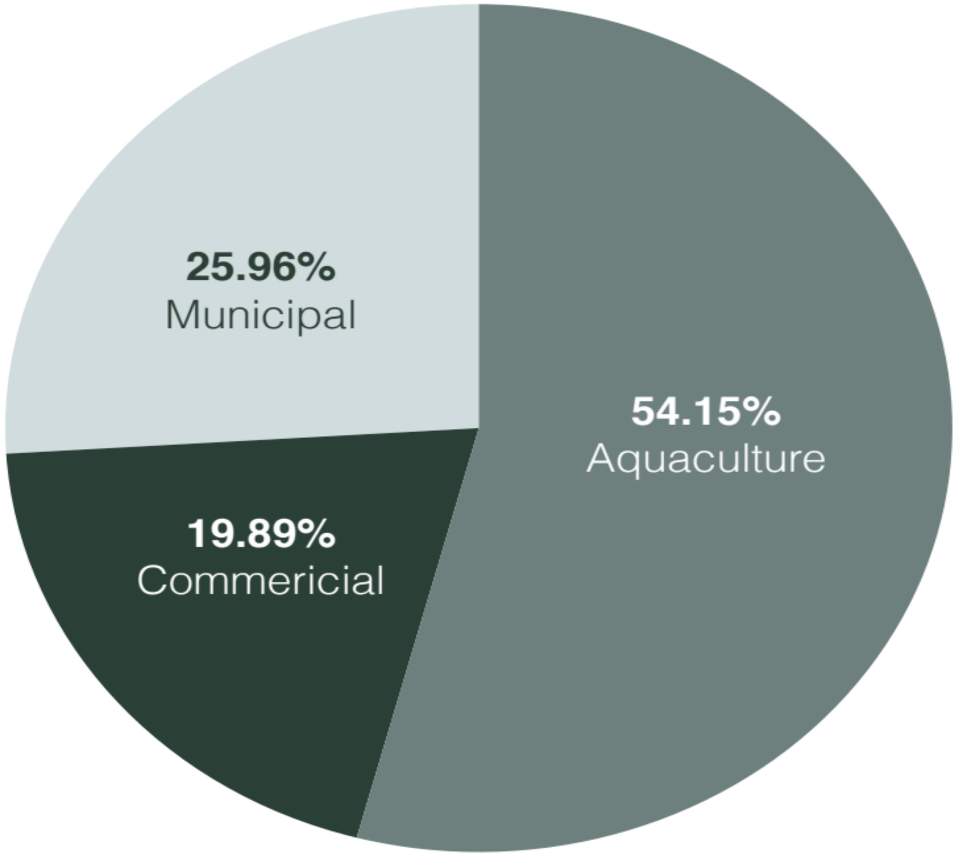


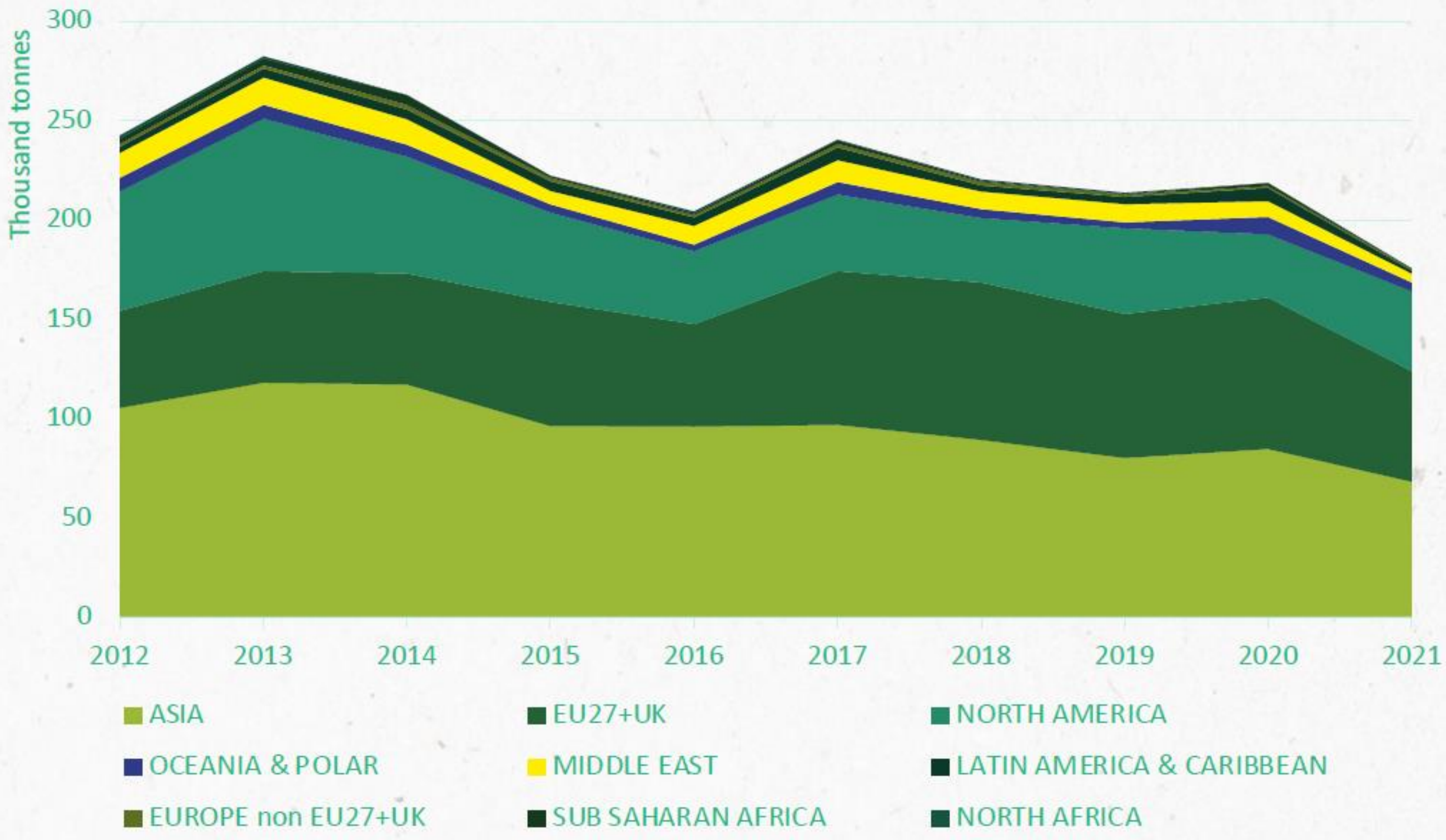
Figure 16. **Distribution of Fisheries Volume of Production by Sub-sector, 2022**

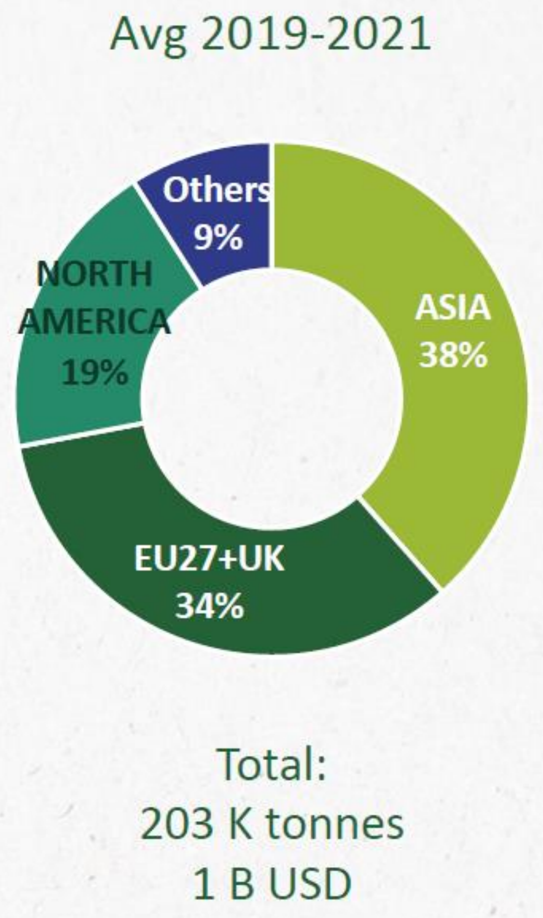
In 2022, the fisheries production recorded a total volume of 4.34 million MT, and a value of PhP 326.57 billion. Aquaculture holds the largest volume share at 54.15% while capture fisheries, which is composed of both municipal and commercial fisheries, only accounted for 45.85% of the total fisheries production volume. Conversely, capture fisheries contributed a substantial 62.03% share to the total value of production, equating to PhP 202.56 billion. Majority of which came from municipal fisheries as it covers 39.08% of the total fisheries value of production. On the other hand, aquaculture only contributed PhP 124.00 billion or 37.97% share despite having a significant volume of production. This can be associated with the cheaper prices of commodities from the said sector. Seaweed, as the top produced commodity in aquaculture, was priced at PhP 137.50/kg on average in 2022. Meanwhile, tuna, the top produced commodity in the capture fisheries, was priced at PhP 262.88/kg on average.

Source: Philippine Fisheries Profile, 2022

Overview of Philippines fishery exports

Evolution of the export market – to where?



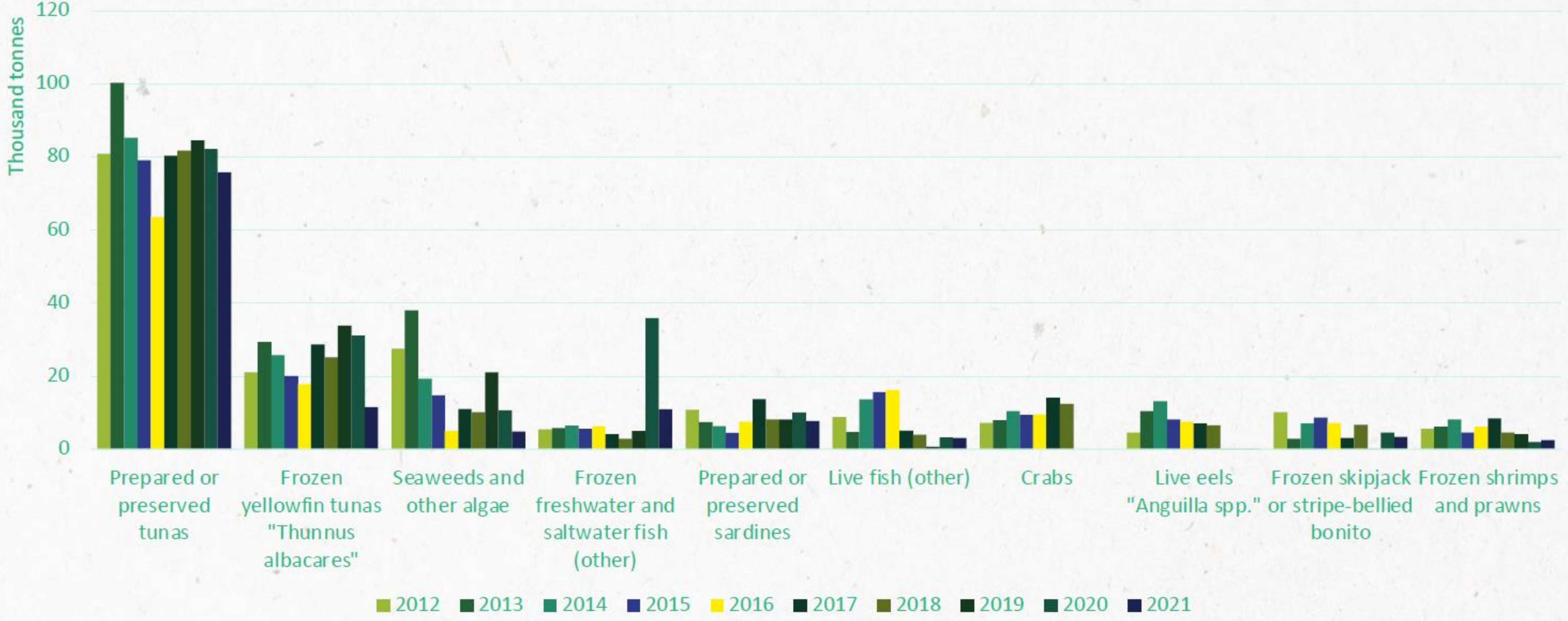


Figures: Evolution of fish exports from Philippines to the rest of the world per destination region, in volume, 2012-2021. On the right, the share of each destination region in average between 2019-2021 in volume.

Source: COLEAD based on CEPII BACI, Eurostat, IFPRI and UK Trade Infos.

Overview of Philippines fishery exports

Evolution of the export market – what products?

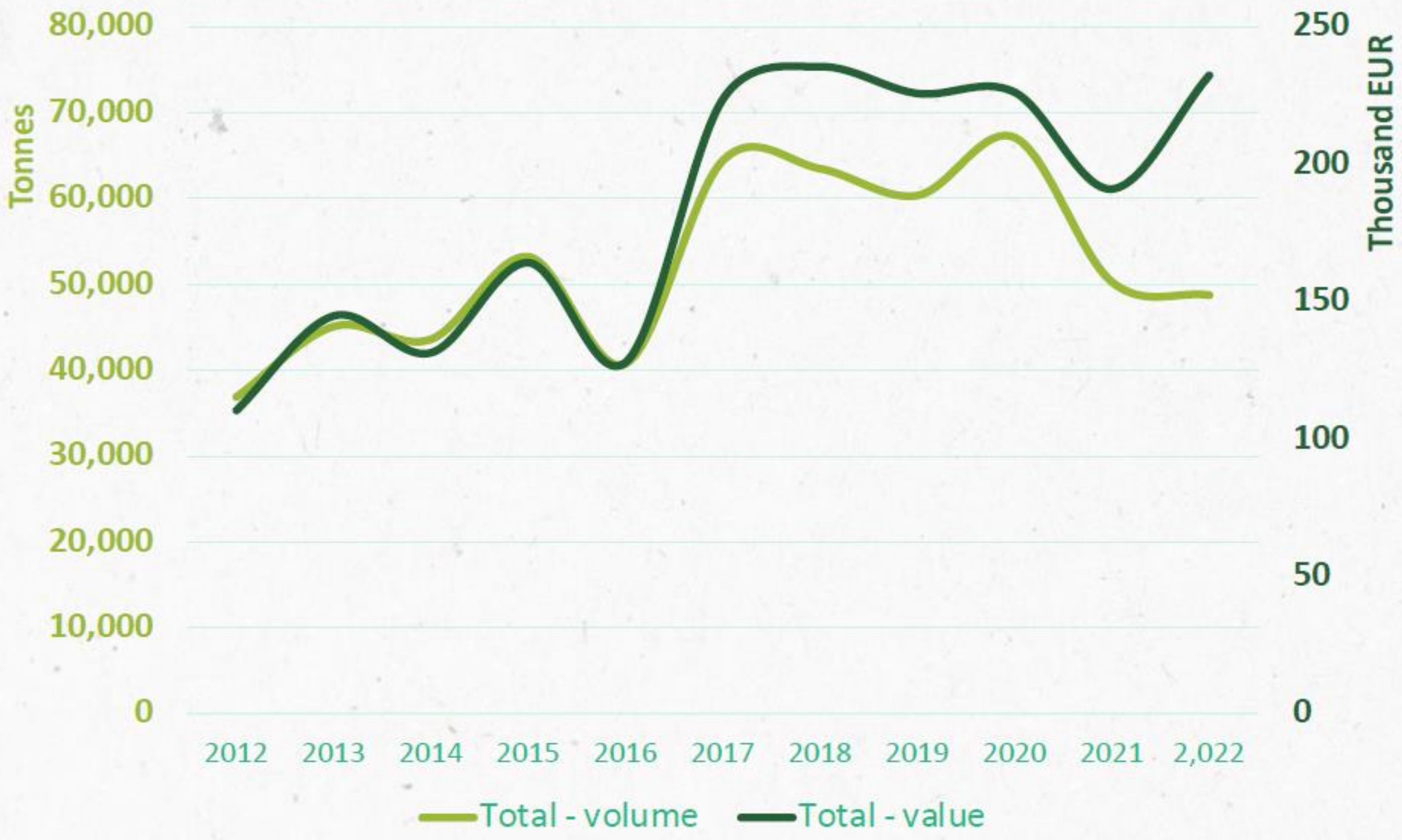


Figures: Top 10 fish products exported from Philippines to the rest of the world, in volume, 2012-2021.

Source: COLEAD based on CEPII BACI, Eurostat, IFPRI and UK Trade Infos.

Overview of Philippines fishery exports

Evolution of the export market – focus on EU27



- Exports of fisheries from Philippines to EU27 shows **growth**: 2.6% in volume and 7% in value (2012-2022)
- Main **destinations**: Germany, Spain, Italy and the Netherlands (78% together)
- Average exports 2020-2022: **55 K tonnes** and **216.5 M EUR**

Figures: Fishery exports to EU27 from Philippines, in volume and value 2012-2022.

Source: COLEAD based on Eurostat.

Trends and Opportunities in Philippine Fisheries Export Trade

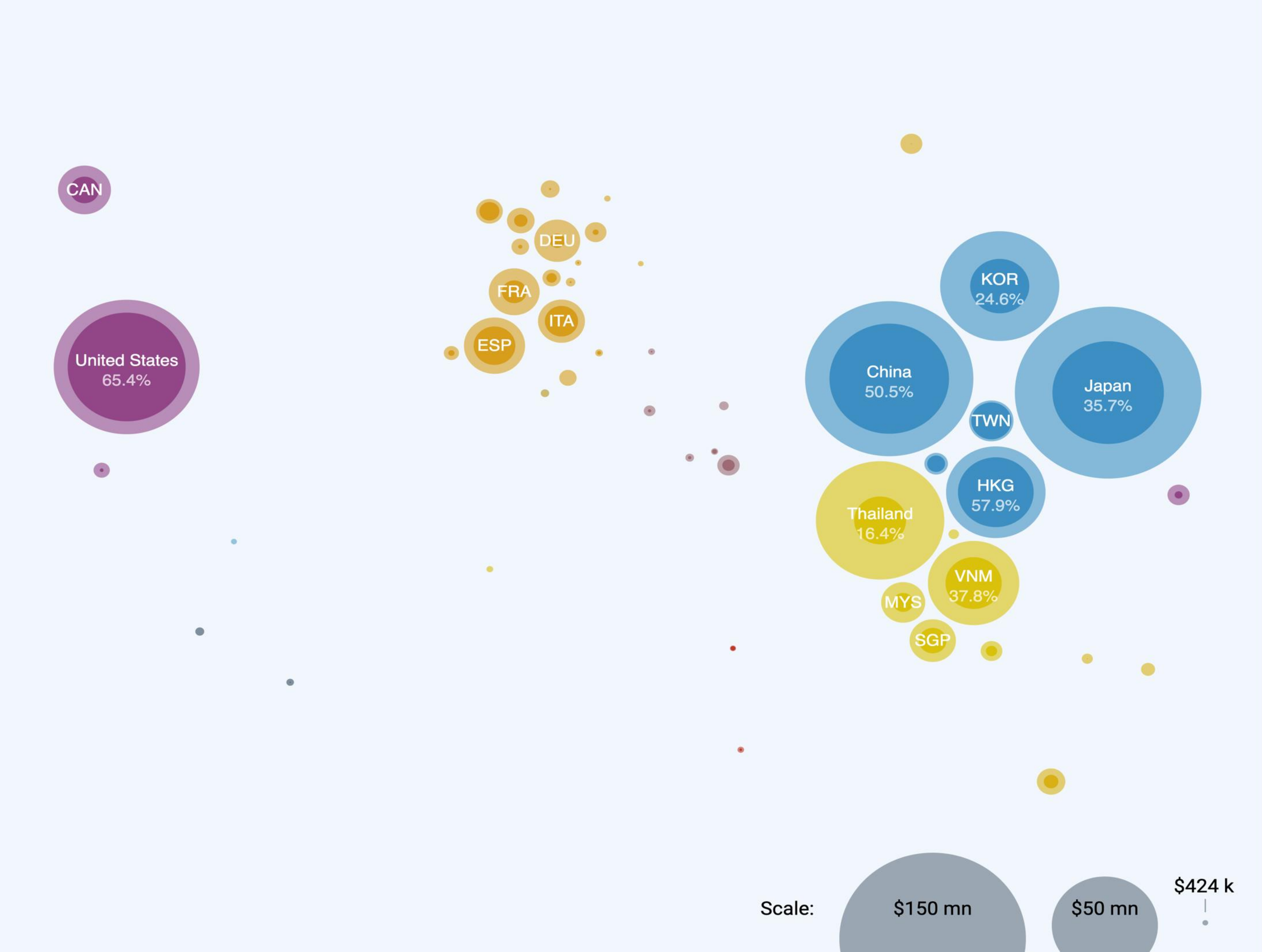
Sixty-five (65) types of fishery products are exported by the Philippines to the world, particularly to the European Union

Only eight (8) types of tuna products comprise more than 91% of the exports by volume

The requirements are currently quite contained to fisheries, yet the aquaculture sector is more complicated from the regulatory side

Source: COLEAD based on Eurostat

Markets with potential for Philippines's exports of Fish & shellfish



Legend

- Export potential
- Realized potential

- East Asia
- Southeast Asia
- North America
- EU & West Europe
- Pacific
- Middle East
- East Europe & Central Asia
- South & Central America
- Eastern Africa
- Northern Africa
- Western Africa
- Caribbean

Tarde data from 2018 to 2022

ITC Export Potential Map

exportpotential.intracen.org

Country/ trading partner	Actual export of the Philippines (US$)	Export potential (US$)	Unrealized potential (US$)
Japan	64 m	150 m	96 m
China	76 m	123 m	61 m
United States	87 m	93 m	32 m
Korea	19 m	63 m	47 m
Hong Kong	42 m	44 m	19 m

Key findings:

The markets with greatest potential for Philippines's exports of Fish & shellfish are Japan, China and United States. Japan shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth $96 m.

Challenges in Export Trade

Difficulty to comply fully with international market access requirements such as food safety, traceability (Catch Certification Scheme) including sustainability, environmental and social responsibility, particularly by Small Scale Fishers (SSF), MSMEs and small exporters.

Stringent and constantly evolving import regulations of major trading partners (i.e., EU, USA, Japan, Middle East, China).

The Philippines is **not** included in Annex VIII of Implementing Regulation (EU) 2021/405 as authorized for entry into the EU of live, chilled, frozen or processed bivalve mollusks, echinoderms, tunicates, and marine gastropods.

The Philippines is listed as having authorization for entry into the EU for composite products with processed products derived from bivalve mollusks originating either in Member States or EU approved third countries

High logistic costs in export and import trade

Philippine seafood products are generally competitive in quality but not in price (eg. Shrimps), due to government-subsidized exports, lower export/import tariffs, duties and taxes by other competing countries.

In aquaculture, fish producers are challenged with high production and input costs, steady supply of good quality fingerlings, mortality due to diseases, natural calamities, and climate change.

Thank you!

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