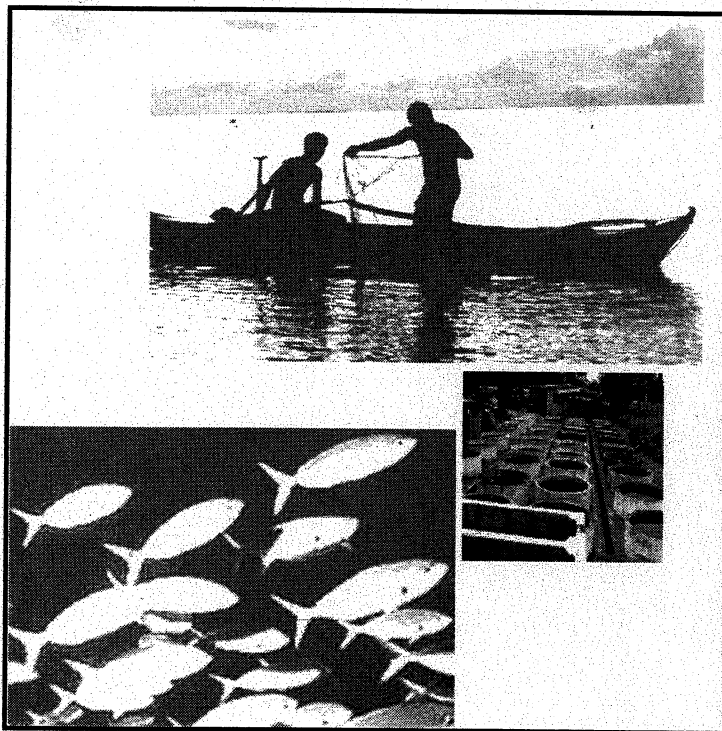
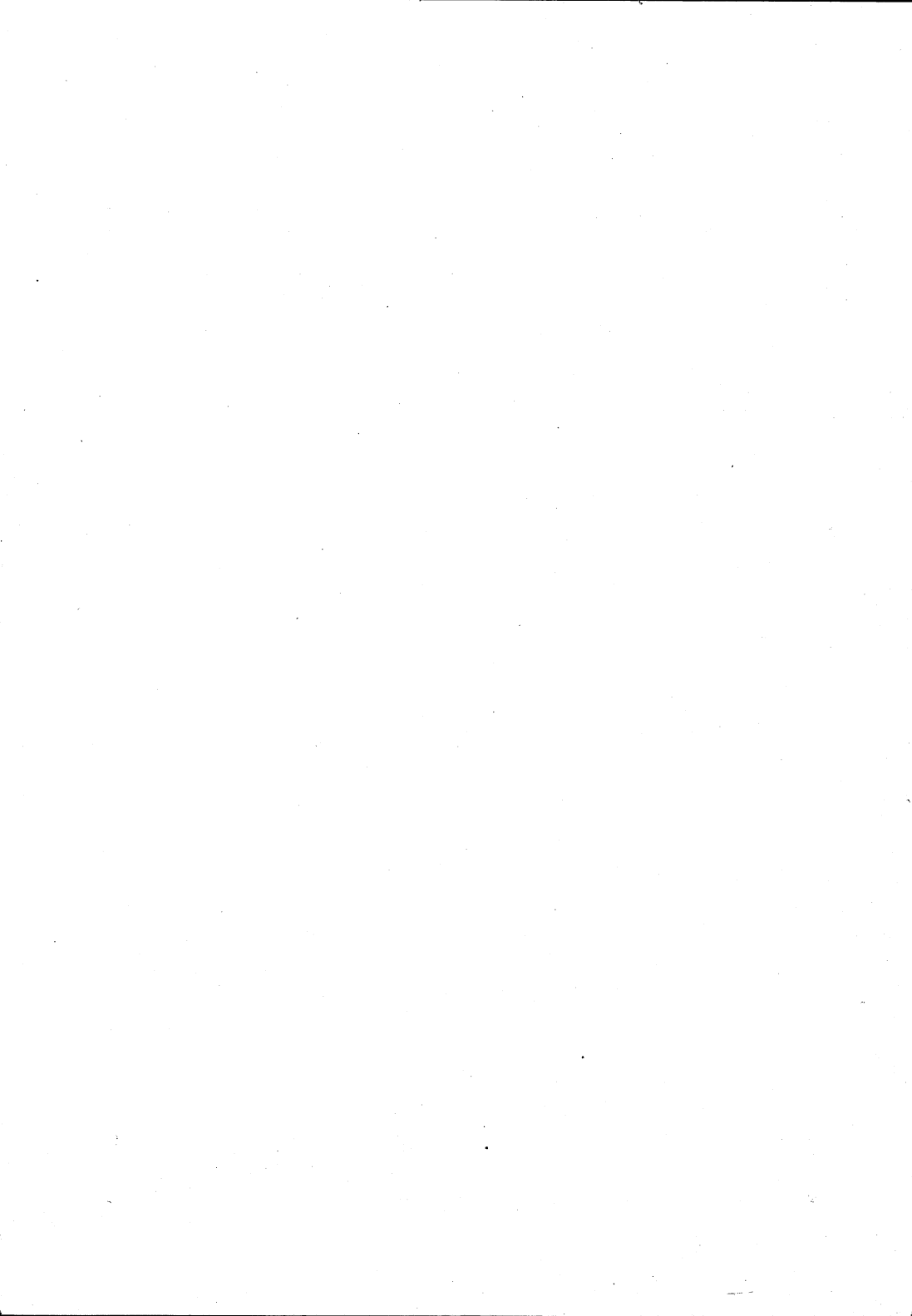


# PHILIPPINE FISHERIES PROFILE, 2004



Republic of the Philippines  
Department of Agriculture  
**BUREAU OF FISHERIES AND AQUATIC RESOURCES**



## FOREWORD

**E**very year, the Bureau of Fisheries and Aquatic Resources (BFAR) is producing a compilation of most relevant fisheries data, which is intended to provide ready-to-use and reliable information to all interested users including the decision/policy makers and researchers. The Philippine Fisheries Profile contains highlights of the previous year's performance of the fisheries industry; its contribution to the national economy; the employment it has generated; the total volume and value of production, both from capture and aquaculture; its share of the foreign trade earnings; as well as its share of the global production of fish, crustaceans, and aquatic plants.

The compilation of these information was made possible through the active collaboration with various government agencies and other institutions such as the Bureau of Agricultural Statistics (BAS), the National Statistics Office (NSO), the National Statistical Coordination Board (NSCB), Food and Nutrition Research Institute (FNRI), and the Food and Agriculture Organization (FAO).

As we distribute the 2004 version of the Philippine Fisheries Profile, we sincerely hope that we can reach out to as many clients and users as possible, and that we satisfy their needs for a concise yet dependable fisheries information and statistics.



**MALCOLM I. SARMIENTO, JR.**  
Director



# CONTENTS

## FOREWORD

## HIGHLIGHTS

### I. FISHERY RESOURCES

- A. Marine Resources 13
- B. Inland Resources 13

### II. FISHERIES CONTRIBUTION TO THE ECONOMY, 2004

- A. Fisheries Contribution to Total GDP 14
- B. Fisheries Contribution to GVA Agricultural Sector 14
- C. Employment 15
- D. Balance of Trade 15
- E. Total Fish Production, by Sector, 2004 16
- F. Fish Production, by Sector and Region, 2004 18
- F-a. Value of Fish Production, by Sector and Region, 2004 19
- G. Fish Production, by Sector, 1995 -2004 20
- H. Five Year Fish Production, Trend 2000 -2004 22

### III. AQUACULTURE PRODUCTION, 2004

- A. Summary of Aquaculture Production by Culture Environment and Region, 2004 24
- B. Aquaculture Production by Culture Environment, Region and Species, 2004 25
- C. Aquaculture Production of Major Commodities by Culture Environment and by Region, 2004 31
- D. Major Species Produced in Aquaculture Fisheries, 2004 34
- E. Ten Major Lakes of the Philippines 34

#### **IV. MUNICIPAL FISHERIES PRODUCTION, 2004**

A. Municipal Fisheries Production, by Region, 2004	36
B. Marine Municipal Fish Catch, by Major Fish Species, 2004	37
C. Number of Municipal Fishing Bancas, by Region, 2000	38

#### **V. COMMERCIAL FISHERIES PRODUCTION, 2004**

A. Commercial Fisheries Production, by Region and by Type of Landing Centers, 2004	40
B. Commercial Fisheries Production, by Major Fish Species, 2004	41
C. Number of Commercial Fishing Vessels, by Region, 1999	42

#### **VI. EXTERNAL TRADE**

A. Exports	
1. Exports of Fish and Fishery Products by Kind, Quantity and Value, 2004	44
2. Major Fishery Exports in Terms of Value, 2004	45
3. Major Destination of Top Three Fishery Exports by Kind, Quantity and Value, 2004	46
4. Fishery Exports, by Major Country of Destination in Terms of Value, 2004	49
B. Imports	
1. Imports of Fish and Fishery Products by Kind, Quantity and Value, 2004	51
2. Major Fishery Imports in Terms of Value, 2004	52
3. Fishery Imports, By Major Country of Origin in Terms of Value, 2004	53

## VII. OTHER FISHERIES INFORMATION

### A. Food Consumption

1. Mean One Day Per Capita Food Consumption, Philippines, 2003 56
2. Comparison of Mean One-Day Per Capita Food Consumption: 1987,1993 and 2003 57

- ### B. World Fisheries Production of Fish, Crustaceans, Molluscs and Aquatic Plants (includes seaweeds), by Capture and Aquaculture, by Major Producers, 2003 58

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- ### C. World Aquaculture Production of Fish, Crustaceans, Molluscs, etc. by Principal Producers in 2003 59

- ### D. World Aquaculture Production of Aquatic Plants by Principal Producers in 2003 60

- ### E. Prices of Selected Fish Species, Philippines, 2004 61

## LIST OF FIGURES

- 1 Philippine Marine Jurisdictional Boundaries 12
- 2 Total Fish Production, by Sector, 2004 17
- 3 Volume of Fish Production, by Sector, 1995-2004 21  
Value of Fish Production, by Sector, 1995-2004 21
- 4 Five-Year Fish Production, Trend 2000-2004 22
- 5 Major Fisheries Export in Terms of Value, 2004 50

## ENDNOTES

# HIGHLIGHTS

## World Scenario: *Philippine Fisheries*

- In 2003, the Philippines ranked 8<sup>th</sup> among the top fish producing countries in the world with its total production of 3.62 million metric tons of fish, crustaceans, mollusks, and aquatic plants (including seaweeds). The production constitutes 2.5% of the total world production of 146.27 million metric tons (FAO website).
- The Philippines' 0.459 million metric tons aquaculture production of fish, crustaceans and mollusks in 2003 ranked 11<sup>th</sup> in the world and a 1.1% share to the total global aquaculture production of 42.3 million metric tons. In terms of value, the country's aquaculture production of fish, crustaceans and mollusks has amounted to over 600 million dollars (FAO website).
- Similarly, the Philippines is the world's 2<sup>nd</sup> largest producer of aquatic plants (including seaweeds) having produced a total of 0.989 million metric tons or nearly 8% of the total world production of 12 million metric tons (FAO website).

## Contribution to National Economy, 2004

- The fishing industry's contribution to the country's Gross Domestic Products (GDP) were 2.3% and 4.2% at current and constant prices, respectively. This translates to some P111 billion for current prices and P48 billion for constant prices of the country's GDP of P4,826 billion (current prices) and P1,146 billion (constant prices).
- The industry also accounted for 14.9% (P111 billion) and 21.6% (P48.7 billion) of the Gross Value Added (GVA) in Agriculture, Fishery and Forestry Group of P742 billion and P225 billion at current and constant prices, respectively, the largest share next to agricultural crops.

## Employment in the Fishing Industry

- The industry employed a total of 1,614,368 fishing operators nationwide (NSO 2002 Census for Fisheries) of which the municipal fisheries sector accounted for more than one million (1,371,676) operators while the commercial and aquaculture sectors added some 16,497 and 226,195 operators, respectively.

## Performance of the Fishing Industry

- Fisheries production grew remarkably by 31.2% from 2.99 million metric tons in CY 2000 to 3.93 million metric tons in CY 2004. Average annual production growth rate within that period was registered at 6.1%. In terms of value, the 2004 fisheries production was valued at 138.8 billion pesos as compared with the 98.6 billion pesos in 2000, an average yearly increment of 10.0 billion pesos.



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- The 2004 fisheries production also showed a remarkable 8.5% increase from the previous year's production of 3.619 million metric tons. The 2004 production was valued at 138.8 billion pesos, 15.8% higher than the 119.9 billion pesos production value of the preceding year.
  - The outstanding performance of the fishing industry was attributed to the excellent growth in production of the three (3) sectors. The aquaculture sector posted the highest growth with 18% (1.7 million MT) followed by the municipal sector with 2.4% (1.1 million MT), and the commercial sector with 1.7% increase (1.13 million MT). The tremendous growth in aquaculture, however, underscores the importance of the sector in maintaining the supply of fish.
  - Correspondingly, the Autonomous Region for Muslim Mindanao—(ARMM) registered the highest production among all regions with its 16.2% or 637,841.51 metric tons share to the total fisheries production, where seaweed was the major commodity produced. Region IV-B (MIMAROPA) made a 14.3% share, while Region IX contributed 13.1% to the total fisheries production.
  - In terms of value, the industry has attained a 15.8% increase from P119.9 billion in 2003 to P138.8 billion in 2004.

## **Fisheries Export and Import Performance**

### **Exports**

- Foreign trade performance of the fishery industry in 2004 registered a net surplus of 433.1 million dollars – total export value of 527.6 million US dollars and import value of 94.5 million US dollars.
- However, export volume (196,087 MT) has decreased by 2.9% in 2004 as compared to the 202,016 MT of fish and fishery products the country has exported in 2003. In terms of value, the industry managed to secure a dismal 0.62% increase from the preceding year's value of export. The three major export commodities (tuna, shrimp/prawn, seaweeds) combined for 70.1% (138,913MT) of the total export volume (196,087MT) and 68% (US\$358.6 million) of the total export value (US\$527.6 million) in 2004.
- Tuna remained as the top export commodity with a collective volume of 78,329 MT for fresh/chilled/frozen, smoked/dried, and canned tuna products valued at US\$155.3. Canned tuna, though, constitutes bulk of tuna products being exported. In general, however, tuna export fell by 7.9% in terms of volume and 1% in terms of value. Major markets for this commodity include Japan, USA, Canada and Germany.

- Shrimp/Prawn on the other hand remained 2<sup>nd</sup> with a total contribution of US\$113.2 million to the total export earnings. Most of the shrimps/prawns are exported in fresh/chilled/frozen form with a total value of US\$112.3 or 99% of the total shrimp/prawn export revenue. The 2004 shrimp/prawn exports, however, decreased by 18.9% and 9.8% from the previous year's export volume and value, respectively. Japan, Korea, and USA are among the major destination of shrimp/prawn products.
- Seaweeds export value grew by a respectable 11.5% from US\$80.8 million in 2003 to US\$90.1 million in 2004 or 17.1% share to the total export earnings for that year. Carrageenan is the major product being shipped abroad comprising 59.7% of the total seaweed export value. USA, France, Denmark and Korea are among the major markets for Philippine seaweed products.
- Other major fishery exports e.g. crabs/crab fats, octopus, pearls, cuttlefish/squid, lapu-lapu, ornamental fish and scallops constitute 20% or US\$106.7 million of the total US\$527.6 million export revenues. Other commodities accounted for the remaining 12% of the total export value/earnings.
- USA, Japan, Korea, Hongkong, Canada, Germany, Taiwan (ROC), Singapore, France and United Kingdom are among the major destination of Philippine fish and fishery product exports (in terms of value) with percentage share of 27.3, 19, 7.5, 6.7, 4.3, 3.8, 3.6, 2.6, 2.3, and 1.6, respectively. Other countries have a cumulative share of 21%

### **Imports**

- 73.2% of the total import value for 2004 was contributed by three major commodities in prawn feeds (27.7%); flour, meals and pellets of fish, crustaceans, and mollusks unfit for human consumption (22.8%); as well as chilled/frozen fish (22.6%). These commodities have an aggregated value of US\$69.1 million out of the US\$94.5 million total import value.
- Prawn feeds were mostly sourced from USA (28.9%), Netherlands (12.4%), Singapore (8.4%), Thailand (6.4%), Germany (5.5%), Belgium (5%), China (4.9%), Spain (4.7%), and other countries comprising 23.7% of the total prawn feeds import value of US\$26.2 million.
- Flour, meals and pellets of fish, crustaceans and mollusks unfit for human consumption, on the other hand, were mostly supplied by the USA (42.5% of the value); Peru (31% of the value); and Chile (6.8% of the value).
- In general, in terms of value, the Philippine fishery imports originated from the following major countries: USA (20.4%); China (9.8%); Indonesia (7.9%); Peru (7.6%); Chile (5.2%); Singapore (4.7%); Taiwan (4.6%); Netherlands (3.7%); Thailand (2.8%); and UK (2.8%). Other countries contributed 30.5% to the total import value of fish and fishery products.

**I. Fishery Resources**

**II. Fisheries Contribution To The Economy, 2004**

