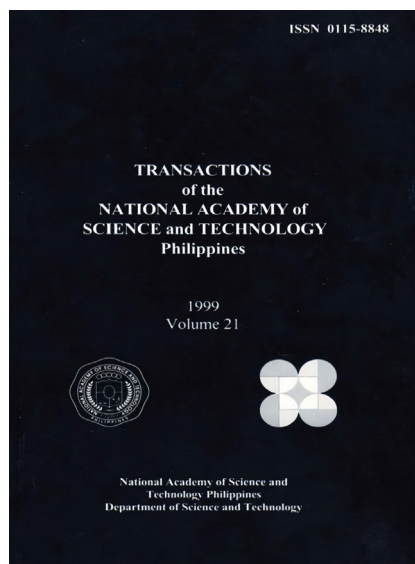


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MAJOR ISSUES, POLICIES AND STRATEGIES ON FISHERIES

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ABSTRACT

This paper describes the status of the fisheries sector - its resources, contribution to economy, and fisheries production. The major concern in this sector is the need to maintain a delicate balance between requirements for increased production and the need to conserve and protect the resources for long term sustainability. Some of the environmental issues facing the fisheries sector are resource depletion, overfishing, destructive fishing, siltation and pollution. Moreover, there are socioeconomic issues of poverty in the coastal areas and policy issues including the need for strong fisheries regulation and enforcement. The paper discusses government programs to address the food needs of the country while conserving and protecting the fisheries resources.

Keywords: fishery, production, overfishing, aquaculture, coastal areas

I. INTRODUCTION

The primary policy of the Philippine Fisheries Code of 1998 states food security as the overriding consideration in the use, management, development, conservation and protection of fisheries in order to address the food needs of the population.

With this premise, the national government under the Estrada Administration launched a new program called "Agrikulturang MakaMASA. Its fisheries component, or "Agrikulturang MakaMASA - Fisheries, aims to develop and manage the country's fisheries for food security, contribute to the socio-economic upliftment of subsistence fisherfolk nationwide, and promote environmental protection for sustained aquatic productivity over the long term period.

II. BRIEF OVERVIEW OF THE FISHERIES SECTOR

A. *The Philippine Fisheries Resources*

An archipelago with 7,100 islands, the Philippines has an extensive coastline more than 17,000 km in length and about 28 million hectares of coastal waters. The country exercises authority over 2.2 million sq km (or 220 million ha) of territorial ocean waters in its exclusive economic zone (EEZ), over seven times its land area. Much of the coastal shelf lies within the so-called "municipal waters" presently defined as those coastal waters extending out to 15 km from the shore.

B. *Contribution to Economy*

The Philippines is an important producer of fish in the world, ranking 13th among the 51 top fish-producing countries in 1996, with its total production of about 1.8 million metric tons¹. In 1998, the fishing industry contributed 2.8% (US\$ 8.80 B) to the country's Gross Domestic Product (GDP) of US\$ 65.10 Billion at current prices. On the other hand, the fisheries sector contributed 3.9% (US\$ 0.85 Billion) to the GDP which totalled US\$ 21.70 Billion at constant prices.

In terms of the Gross Value Added in Agriculture, Fishery and Forestry Sector, the fisheries industry accounted for 16.50% (US\$ 1.80 Billion) at current prices and 20.1% (US\$0.85 Billion) at constant prices. Fisheries contributed the largest share next to agricultural crops.

On the country's external trade, the regional financial crisis had its toll on our fish and fishery trade products. Although the quantity of exports slightly increased by 6.7% from 173,887 mt in 1997 to 185,560 mt in 1998, the value declined by 3.6% from US\$ 549.8 M to US\$ 530 M in the same period.

Although not a dominant player in the national economy, fisheries is nevertheless an important sector. Fish continues to be the principal source of protein of the country's population. The fisheries sector even provides direct and indirect employment to over one million people or about five percent of the national labor force.

C. *Fisheries Production*

Based on the preliminary estimates of the Bureau of Agricultural Statistics (BAS), the total fish production for 1998 rose to 2.79 million metric tons valued at US\$ 2.1 B, compared to 2.77 million metric tons valued at US\$2.7 B in 1997. An increase of 0.72 percent and 8.7 percent was recorded in terms of quantity and value, respectively. The fish production was mainly contributed by aquaculture fisheries, 34.4 percent, followed by commercial fisheries, 33.7 percent, and municipal fisheries, 31.9 percent. In terms of total value, the highest share came from commercial fisheries, 33.9 percent, followed by aquaculture fisheries, 33.1 percent and municipal fisheries, 33 percent.

¹At the 1997 and 1998 exchange rate of US\$1=P29.47 and P40.89, respectively.

III. KEY ISSUES IN THE FISHERIES SECTOR

The major concern in the fisheries sector is the need to maintain a delicate balance between the requirements for increased production, which contribute to food security, and the need to conserve and protect the resources for long-term sustainability. Other interrelated key issues and concerns which the government should address include the following:

A. Resource Management and Environmental Issues

1. *Resource Depletion in the Coastal Areas and Inland Waters*

The current problems in the coastal areas and inland waters are overcrowding, illegal fishing, resource and habitat degradation (fish stock, coral reefs and mangroves), pollution and intense competition between user groups. All of these reflect the lack of effective resource management activities in these areas.

2. *Overfishing*

Competition between the municipal and the commercial fishing sectors is due to the finite nature of marine resources combined with an "open-access" principle. When excessive levels of fishing effort lead to resource depletion, fisherfolk are forced to employ more efficient fishing technology, increasingly finer meshed nets, poisons and other destructive fishing methods to meet their short-term needs at the expense of resource sustainability.

3. *Destructive Fishing*

Dynamite or blast fishing, fishing with poison and/or destructive gears are particularly damaging to fisheries resources. In addition to endangering the safety of the user and causing structural damage to coral reef areas, blast fishing tends to indiscriminately kill aquatic organisms essential to continued marine productivity.

4. *Siltation/Pollution*

Deforestation in upland areas has dramatically increased sediment loads in associated inland water systems in many parts of the Philippines. A number of bays, lakes and river systems have been particularly damaged with increased siltation and pollution from mine tailings and agricultural wastes.

B. Socioeconomic Issues

Poverty in the coastal areas is caused by high population density in most nearshore areas; resource depletion of most municipal waters due to overfishing; weather problems which limit the time spent at sea by the fisherfolk; poor post-harvest handling and inefficient distribution practices which lower product value; and lack of alternative income-generating opportunities in the countryside. The fact is, the municipal fisherfolks are in a vicious poverty cycle wherein fish catch per fisherfolk is declining and can no longer support a viable livelihood.

C. Policy Issues

1. Need for Strong Fisheries Regulation and Enforcement

With the implementation of the Philippine Fisheries Code of 1998, fishery law enforcement nationwide needs strengthening, in close coordination with local government units and national law enforcement agencies. Generally, the main problems in effective implementation are: lack of appropriate equipment, operating funds and trained manpower.

2. Fisheries Information

To make intelligent policy, program and investment decisions, an appropriate, useful and timely fisheries data is required. Currently, knowledge about both traditional and nontraditional fisheries resources of the country is grossly inadequate to properly shape the longer-term fisheries management and development policies. The statistical system, a potential source of knowledge on the resource as well as its use, needs to further expand its coverage, and be more accurate and comprehensive.

3. Revision of Lease and Licensing Fees

Licenses or rents are imposed by the government for access to and for the use of public resources for fisheries exploitation in order to appropriately manage publicly owned assets and to obtain fair owned assets. However, at present the license fees and rent levels are too low to directly substantiate, the two objectives. Therefore, there is an urgent need to review and revise license rates and related fees based on completed studies.

D. Fisheries Institutional Issues

1. Need for Institutional Strengthening

To further develop and manage the Philippine fisheries sector, it is important that the recently approved Philippine Fisheries Code of 1998

be implemented effectively and efficiently nationwide. This is to ensure effective promotion of fish production, judicious management of fisheries resources, provision of extension, research and support services to the fisheries sector. In addition, institutional strengthening efforts must be directed at preparing the local government units in assuming fisheries resource management responsibilities.

2. *Need for Human Resources Development*

There is an urgent need to continuously upgrade the technical capabilities and skills of the fisheries staff and field personnel of concerned agencies in the implementation of fisheries programs and projects, particularly the local government units, in terms of management, conservation, research and extension.

3. *Access to Credit*

At present, access to credit for fisherfolk and small fishfarmers is still constrained by the lack of conduit banks in the rural areas and the reluctance of commercial banks to lend to small entrepreneurs because of high intermediation costs, lack of sufficient collateral, and limited potential for business growth. Moreover, there is a need to strengthen the capabilities of NGOs and community-based credit cooperatives serving as financial intermediaries in project identification and financial management to effectively assist the fisheries industry, particularly the fisherfolks to gain access to credit facilities.

E Fisheries Industry Issues

1. *Post-Harvest*

Although the government has started fisheries infrastructure programs to upgrade post-harvest infrastructure and techniques nationwide, its implementation need to be expedited to minimize fisheries production loss. Most losses being incurred by the municipal fisherfolk are inadequate access to post-harvest technologies and facilities as well as difficulties in placing their products in the higher-priced urban markets. With regards to exports, the commercial sector must also conform with the specific quality standards of each importing country.

2. *Aquaculture Productivity*

Overall production from municipal fisheries is unlikely to increase substantially in the future considering that majority of the fishing areas in the country are overfished. The country will therefore depend more on aquaculture to meet its rising domestic consumption requirements.

Therefore, there is a need to improve aquaculture productivity through the introduction of improved aquaculture technologies within ecological limits, and the provision of extension services and credit access to the industry.

IV. DEVELOPMENT AND MANAGEMENT POLICIES AND STRATEGIES

A. Declared Policies in the Fisheries Sector

The declared fisheries policies of the State under the Philippine Fisheries Code of 1998 (Republic Act 8550) are:

- To achieve food security as the overriding consideration in the use, management, development, conservation and protection of fishery resources in order to provide the food needs of the population. A flexible policy towards the attainment of food security shall be adopted in response to changes in demographic trends for fish, emerging trends in the trade of fish and other aquatic products in domestic and international markets, and the law of supply and demand;
- To limit access to the fishery and aquatic resources of the Philippines for the exclusive use and enjoyment of Filipino citizens;
- To ensure the rational and sustainable development, management and conservation of the fishery and aquatic resources in Philippine waters including the Exclusive Economic Zone (EEZ) and in the adjacent high seas, consistent with the primordial objective of maintaining a sound ecological balance, protecting and enhancing the quality of the environment;
- To protect the rights of fisherfolk, specially of the local communities with priority to municipal fisherfolk, in the preferential use of the municipal waters. Such preferential use, shall be based on, but not limited to, Maximum Sustainable Yield (MSY) or Total Allowable Catch (TAC) on the basis of resources and ecological conditions, and shall be consistent with our commitments under international treaties and agreements;
- To provide support to the fishery sector, primarily to the municipal fisherfolk, including women and youth through appropriate technology and research, adequate financial assistance, production, construction of post-harvest facilities, marketing assistance, and other services. The protection of municipal fisherfolk against foreign intrusion shall extend to offshore fishing grounds. Fisherworkers shall receive a just share for their labor in the use of marine and fishery resources.

- To manage fishery and aquatic resources, in a manner consistent with the concept of integrated coastal area management, in specific natural fishery management areas, appropriately supported by research, technical services and guidance provided by the State, and
- To grant the private sector the privilege to use fishery resources under the basic concept that the grantee, licensee or permittee thereof shall not only be a privileged beneficiary of the State but also an active participant and partner of the government in the sustainable development, management, conservation and protection of the fishery and aquatic resources of the country.

B. Agrikulturang MakaMASA – Fisheries Programs

The Makapagpabagong Programa Tungo sa Maunlad at Masaganang Agrikultura at Pangisdaan. (Agrikulturang MakaMASA -- Fisheries Program), 1999-2004 is designed to provide national directions and framework to develop and manage the country's fisheries resources for food security and ensure socio-economic upliftment of subsistence fisherfolk.

This program will serve as guide for LGUS, RFUs and other concerned agencies and organizations in the implementation of management and development interventions in the fisheries sector. Development efforts shall be focused on the expansion and revitalization of productivity programs as well as the provision of support activities such as research and extension. Management efforts on the other hand, shall cover the conservation, protection and sustained management of the country's fishery and aquatic resources to ensure its long-term sustainability.

1. Goals and Objectives

The goals and specific objectives of the Agrikulturang MakaMASA-Fisheries Program, 1999-2004 are to:

- Contribute to national food security at all times;
- Ensure the rational and sustainable development, management and conservation of fishery and aquatic resources in Philippine waters including the EEZ and adjacent high seas;
- Reduce poverty incidence in the coastal areas; and
- Enhance people empowerment in the fisheries sector.

Specifically, the objectives formulated under the Program seeks to:

- To improve aquaculture productivity within ecological limits;
- To optimize use of offshore fisheries and deep-sea resources;
- To improve product quality and reduce post-harvest losses;
- To provide a favorable policy environment conducive to increased investment and global competitiveness and people participation.

- To conserve, protect and sustain management of the country's fishery and aquatic resources; and
- To alleviate poverty among municipal fisherfolks and provide supplementary livelihood.

2. Strategies

The overall strategies as specified under the Program are to:

- Produce quality fish broodstock, seeds and fingerlings;
- Promote production-intensifying but cost reducing technologies within ecological limits;
- Improve production-marketing systems to become more efficient and effective;
- Empower local government units (LGUs) to assume primary responsibility for food security and resource management within their respective areas;
- Provide technical support for LGUs to help them attain the target yield;
- Develop complementation and counterparting schemes with the LGUs;
- Conserve and protect the country's fisheries and aquatic resources;
- Direct national government support to strategic areas;
- Help the private sector avail of trade and fiscal incentives.
- Promote fisherfolk organizations; and
- Tap the expertise of private/state universities and colleges (SUCs) in accessing appropriate technologies, providing a forum for research extension linkages, and assisting in the evaluation of programs.

3. Major Fisheries Projects and Activities

There have been several fisheries projects and activities initiated by the government, non-governmental organizations, the academe, people's organizations and local government units to address the issues on food security and socio-economic upliftment of municipal fisherfolk, to wit:

A. *Fisheries Production*

Increase in fish production shall come from aquaculture including increase in productivity of brackishwater and freshwater fishponds, swamp/marsh fisheries and sea cages in coastal areas. Technical assistance and extension services shall be provided, fisheries technologies disseminated and fishfarms rehabilitated/improved.

B. *Conservation and Management*

Implementation of integrated coastal and marine resource management activities, strict enforcement of fisheries laws, rules and regulations and rehabilitation of habitats shall be undertaken to ensure a rational and properly utilized, managed, conserved, protected and sustained Philippine fisheries and aquatic resources in the coastal and other marine areas as well, and address the problems of environmental degradation and destruction of fishery resource base.

C. *Fisheries Post-Harvest and Infrastructure*

The Maka-MASA – Fisheries Program shall focus on activities that will help reduce post-harvest losses, protect the health of consumers, increase fisheries exports establish appropriate product standards and implement quality inspection procedures for fishery products.

In addition, the Program through the Philippine Fisheries Development Authority (PFDA) shall provide fisheries infrastructure facilities to reduce post-harvest losses. The infrastructure facilities shall include the establishment and/or improvement of regional and municipal fish ports/landings, ice plant and cold storages and other post harvest and marketing support facilities such as municipal processing plants.

D. *Fisheries Training and Extension Services*

Fisheries training and extension services/technical assistance on aquaculture, marine fisheries and post-harvest technology to fisherfolk nationwide shall be provided in coordination with the LGUs to ensure that results of scientific research studies reach the desired clientele.

E. *Fisheries Information and Marketing Support*

In order to create awareness among Filipinos, particularly the fisherfolks, a well-coordinated information campaign on fisheries education, marketing, resource management, fisheries laws, rules and regulations and fisheries technologies shall be undertaken.

F. *Research and Development in Fisheries*

An integrated approach to research that includes a unified, updated, area-based and client-responsive R&D fisheries program will be pursued. This program aims to ensure the sustainability of

appropriate fisheries technologies which the fisheries industry can adopt as well as enhance its global competitiveness.

G. *Rural Finance in Fisheries*

Per the Agriculture and Fisheries Modernization Act 1997 (RA 8435) and the Philippine Fisheries Code of 1998 (RA 8550), provision of credit and credit guarantee and mobilization of rural savings as support mechanisms are directed to: a) improve income diversification among marginal coastal fisherfolk; b) intensify aquaculture productivity within ecological limits; c) support commercial/deep sea fishing within ecological limits; and d) support small and medium scale enterprises (SMEs) engaged in fisheries in pursuit of a modernized and self-sufficient fisheries sector.

H. *Program Organization and Management*

As one of the components of the Department of Agriculture's new banner program, the MakaMASA – Fisheries Program shall focus on the attainment of food security and poverty alleviation, in cooperation with local government and other stakeholders engaged in developing and managing their respective localities. The Program shall be managed through a Program Committee chaired by the Secretary of Agriculture, co-chaired by the Undersecretary for Fisheries and Aquatic Resources. The MakaMASA -- Fisheries Program Directorate shall be created with the BFAR Director as Chairman and the heads of all concerned agencies as members. The Program Directorate shall oversee program implementation and ensure proper coordination among concerned agencies and units. At the field level, the local government units shall provide extension services, facilitate implementation of fisheries development and management projects and provide linkage with the private sector, cooperatives/organizations, NGOs, fishing communities and other stakeholders.

V. FUTURE THRUSTS AND DIRECTIONS OF FISHERIES SECTOR

The Philippine Fisheries Code of 1998 provides the tall mandate to modernize the Philippine fishery industry while promoting the development, conservation, management, and protection of the country's vast fisheries and aquatic resources. We envision in the next millennium that the fisheries sector shall be dynamic, technologically advanced and internationally competitive in a fair market regime with the transformation guided by the sound practices of resource efficiency, sustainability, equity and active private sector participation.