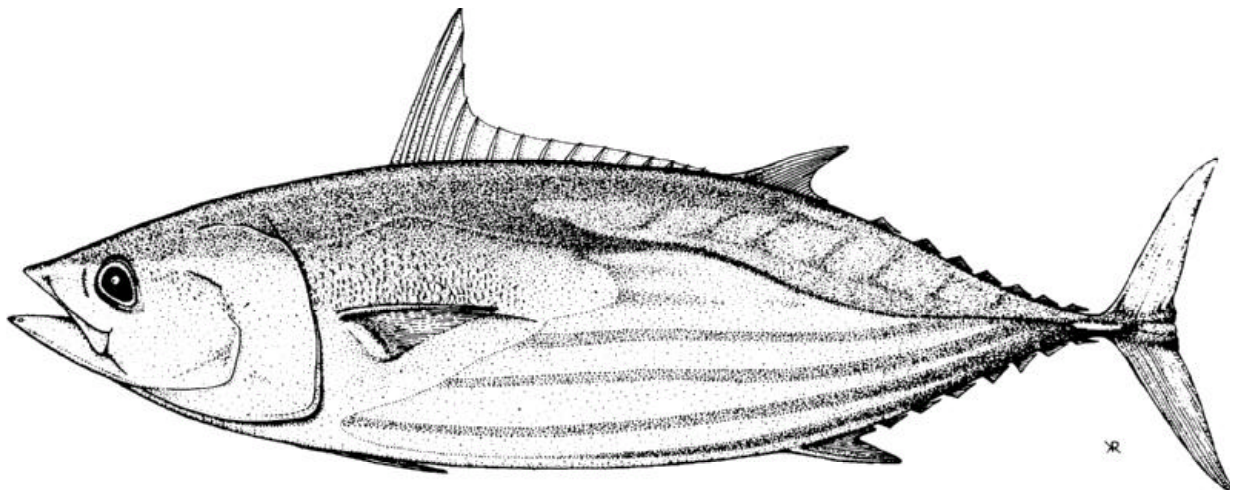


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National Tuna Fishery Report - Philippines



Noel Barut

Marine Fisheries Research Division
National Fisheries Research and Development Institute
Quezon City, Philippines

NATIONAL REPORT (Philippines)

Introduction

The tuna fishing remains an important fishing sector of the country. It provides significant export revenues for the country and generates a great number of employments as well as source of nutrition for a large portion of the local community. The three main gears used in catching tunas are the ringnets, purse seine and handline. Fishing for tunas occur in all fishing grounds of the country but are heavily concentrated in Moro Gulf, Sulu Sea, South China Sea and southern Luzon.

Purse seining and ringbnet fishing for tunas is carried out in conjunction with a fish aggregating device (FAD) whether done in near shore or offshore waters. Ringnet are usually operated near shore and are catching the small tunas while purse seine are operated offshore as well as the handline. These fishing operations are done to ensure a good catch and minimize the cost of fishing operation. The introduction of the FAD in Philippine tuna fishing in 1975 proved to be very effective in catching not only the tunas but other pelagic fish as well. Thus, making it popular in the following years up to the present time for catching pelagic fishes.

Purse seine and ringnet are the two main gear used in catching tunas with the used of FAD locally known as *payao*. Handline fishing is normally operated within or near the vicinity of a *payao* and is mostly the municipal fishermen. The commercial fishing boat operators own the *payao* and that the municipal fishermen are allowed by the operator to fish in their *payao* since they are targeting the larger tunas. In some cases there is an arrangement with the owner of the *payao* and are entrusted to guard the *payao* from fishing by the other commercial fishing boats.

Twenty one species of tuna and tuna like fish are caught in Philippine waters but only six species are exploited in commercial quantity. These are the yellowfin, skipjack, bigeye, frigate, bullet and eastern little tunas.

Tuna Production

Since the transfer of the collection of fisheries statistics from the Bureau of Fisheries and Aquatic Resources (BFAR) to the Bureau of Agricultural Statistics (BAS), the collection of tuna statistics is segregated only by species and not by gear anymore. Production for all species of fish is combined together by gear in the report of the BAS.

The total tuna production from 1997 to 2001 showed a steady increased from 312,506 mt to 352,483 mt. with an annual average increased of about 8,000 mt. Only the yellowfin/bigeye tuna showed a significant increased from 67,342 mt in 1997 to 96,450 mt in 2001. The production of Skipjack from 1997 to 2001 is from 110,097 mt to 112,238 mt; frigate/bullet tuna increased from 108,494 mt to 115,905 mt during the five year

period from 1997 to 2001. Eastern little tuna only showed an increased of 1,317 mt from 1997 to 2001 or a production of 26,573 mt in 1997 to 27,890 mt in 2001 (Table 1).

Table 1. Total tuna production from 1997 to 2001

Year	Yellowfin/ Bigeye	Skipjack tuna	Frigate/ Bullet	Eastern Little tuna	Total
1997	67,342	110,097	108,494	26,573	312,506
1998	79,215	116,673	106,433	24,424	326,745
1999	90,353	108,778	111,301	25,406	335,838
2000	90,328	113,011	112,227	27,963	343,529
2001	96,450	112,238	115,905	27,890	352,483
Average	84,738	112,159	110,872	26,451	334,220

Fleet structure

The major commercial gears used in capturing tunas are the purse seine followed by ring net, handline and longline. This is presented in table 2. Although in terms of the number of handline officially licensed by BFAR is few, the actual figure in operation maybe more than 10,000 units that are actually fishing for tunas and other pelagic fish. Handline boats are generally classified as municipal boa, which is being licensed by the local government unit.

In the Philippines, boat with three gross tonnage and below are classified, as municipal fishing boat and the licensing of these boats are the responsibility of the local government unit. Whereas boats more than three gross tonnage are considered commercial fishing boats and is issued a commercial fishing permit by the BFAR. Commercial fishing boat is not allowed to fish within the municipal waters, which is 15 kilometers from the shoreline.

Table 2. Number of licensed major commercial gears used in catching tunas (1998-2000)

Type of Boat	1998	1999	2000
Purse Seine	109	162	135
Ringnet	18	29	29
Handline	34	23	18
Longline	9	13	14

Final Market Destination

The catch of purse seine and ringnet are mostly delivered to the canneries while the target market of the handline fishermen is the sashimi market of Japan. Small tunas such as the eastern little tuna, frigate and bullet tunas are consumed locally. There are 10 canneries that processed tunas, which are mostly exported and other fish

like sardines, mackerels, roundscads, milkfish that goes to the local markets of the country.

The total tuna export from 1997 to 2001 declined from 79,114 mt to 56,752 mt comprising of fresh/chilled/frozen, canned and smoked tunas. The highest export recorded was in 1998 with a total tuna export of 99,461 mt. For that period canned tuna was the top export in 1997, 1998 and 2001 while in 1999 and 2000 the top export was the fresh/chilled/frozen tuna (Table 3).

Table 3. Tuna export (mt) from 1997 to 2001

Tuna	1997	1998	1999	2000	2001
Fresh/chilled/ Frozen	22,755	46,154	42,023	43,060	22,073
Canned	56,163	53,120	36,857	36,458	33,909
Smoked	196	187	253	590	771
Total	79,114	99,461	79,133	80,108	56,752

The total export of fresh, chilled or frozen tuna in 1997 was 22,755 mt and went up to 46,154 mt in 1998 however in 1999, 2000 and 2001 the total export went down to 42,023 mt, 43,060 mt and 22,073 mt respectively. Japan, USA and Thailand are the top three importers of the fresh, chilled and frozen tunas of the country from 1997 to 2001 (Table 4).

Table 4. Major destination of fresh/chilled/frozen tuna export (mt) from 1997-2001

Country	1997	1998	1999	2000	2001
Japan	13,269	16,621	22,422	13,132	4,143
Thailand	5,841	19,131	4,286	11,017	5,604
USA	1,018	1,299	10,722	4,672	3,504
Other countries	2,627	9,103	4,593	14,239	8,822

The major destination of canned tuna export from the Philippines is presented in table 5. The table presents the top three importers of canned tuna from 1997 to 2001. The top three importers of canned tuna vary from year to year, however the countries that are not listed in the top three importers the succeeding or preceding years does not mean that it did not import canned tuna from the Philippines. It so happened that the BAS presented only the top three importers every year

Table 5. Major destination of canned tuna export (mt) from 1997-2001

Country	1997	1998	1999	2000	2001
Japan	17,370	1,801			
German	10,528		3,447		4,623
Canada	5,146		6,067	3,838	
USA		15,120	9,333	12,313	8,029
South Africa		5,306			
Singapore				6,562	4,240
Other countries	23,119	30,893	18,010	13,745	17,017

The USA and Japan are the two regular importers of smoked tunas from the Philippines. The volume imported by these two countries varies from year to year for the period 1997 to 2001. Other countries that imported smoked tunas from the Philippines are presented in table 6.

Table 6. Major destination of smoked tuna export (mt) from 1997-2001

Country	1997	1998	1999	2000	2001
USA	145	132	53	23	23
Japan	39	36	158	490	673
South Africa	9				
Hawaii		15	15		
Taiwan					53
Belgium				30	
Other countries	3	4	27	47	22

Onshore developments

Only one transshipment port is allowed in the Philippines located in Mindanao. The Daliao fishing port complex in Davao City is the only port allowed for transshipment of tunas and other large pelagic. The General Santos fishing port complex is also being considered as another transshipment port.