

Highlights of Agro-Industrial Cluster Analyses

THE FISHERIES AND AQUATIC RESOURCES

Felix R. Gonzalez

Secretary General

National Chamber of Fisheries and Aquatic Resources

I would concentrate my comments on several most important issues that I see in the development of Philippine Fisheries. But first, may I say that the Bureau of Fisheries and Aquatic Resources (BFAR), seems to be not included among the agencies which crafted the strategic plan. The draft considered the changes in the alcovial system, natural resources system and the social system. What about the cultural and traditional considerations in framing the plan? The draft plan recognizes agriculture, and of course, this includes fisheries, as a business and that the lead role would be given to the private sector. I think the word "would" should be changed to "should" because of the compelling role of private sector.

The draft plan recognizes the importance of harnessing of the coastal areas for aquaculture and marine culture production with emphasis on the social aspects of coastal areas development. May I also stress that RA 8550 or the Fisheries Code of 1998 was not considered nor mentioned substantially in the draft plan. This Fisheries law touches on a wide range of fisheries program, policies and projects. Among others, the draft plan does not merely focus on productivity but it recognizes the importance of post harvest and marketing. A strong point towards making changes in agriculture and fisheries is the recognition of transparency and accountability in the Department of Agriculture. Integrated research and development in extension systems must be given the highest concerns not only in paper as we have witnessed during the last decades. The fishing industry of the Philippines has lagged behind Thailand, Vietnam and Indonesia. Before, we were number 1; now we are last in Southeast Asia.

In terms of involvement, I noticed that BFAR as an organic agency involved in fisheries was not included in the writing panel nor mentioned as sponsor maybe because no scientist from the fishing industry is a member

of NAST but we are very happy that Philippine Council for Aquaculture and Marine Research and Development (PCAMRD) Executive Director Dr. Rafael Guerrero and UP Marine Science Institute Director Dr. Eduardo Gomez are members of NAST and they have helped a lot in the framing of the plan. It also appears that BFAR was not listed as a stakeholder or a support agency among the various agencies noted in the main report. I believe that the fishing industry sector needs to be more involved in the framing of PA 2020.

It appears that in the PA 2020, fisheries were not given substantial considerations. Capture and culture fisheries were treated as a sub-item only in the agro-industrial cluster. References are, of course, an indication of the depth of analysis of a chosen subject. I noticed that the main report sorely lacked published materials in the area of fisheries. I am aware that there is a huge body of literature dealing with various sectors of fisheries, e.g., in aquaculture development, in marine culture fisheries and in municipal fisheries.

Here are some broad comments on the presentation on capture fisheries and aqua culture. Most data used were those reported as of 2003 which did not clearly show the behavior of incremental growths, in production, labor, income, government budgets, exports, infrastructure and others. There was no attempt in the plan to compare the growth of protein sources either from animals and fish. The comparison will allow the planners to discuss the sources that may not be able to sustain growth. Fish as a source of fish meal, may not sustain the growth of livestock and poultry in the next ten years. There is therefore a need to plan for the development of protein substitutes. I hope to see the plan with the yearly projections on increased production, changes in per capita consumption, percentage contribution of each of the species or group of species, employment and others. The yearly projection will allow us to detect behaviors in the growth of various aspects of the industry.

What will be the effect of the lack of food sources from fish as a result of closed seasons, limited access and regulation on the utilization of fishing vessels. According to RA 8550, abandoned, unproductive and underutilized fish ponds now estimated at around 200,000 ha must be reverted to their original mangrove state. Aquaculture must then be further developed because of the dwindling productivity and income from marine fisheries. The numerous provisions listed in the Philippine Fisheries Code of 1998 should now be reviewed if we want the fishing industry to support the

growing needs of the population towards the immediate decade. Most of the provisions are supportive towards conservation but are against productivity. Where shall we go? Shall we support conservation while we lack food for the stomach? These are the things that the planners should look into.

The following must be considered in framing PA 2020: (1) creating a department of fisheries to give impetus and support to the growing importance of fisheries. In our neighboring countries like Thailand and Indonesia, fisheries are at the level of department. (2) Opening up of our fisheries beyond the 20 km limit towards the 200 mile economic zone. In the Philippines, we only think of our own coastal fisheries. It is high time that we look into the development of international fisheries beyond our 200 mile economic zone. (3) The numerous provisions listed in the Fisheries Code should now be reviewed if we want the fishing industry to support the growing needs of the population. Allowing municipal fishermen to use more than 3 tonnage gross for them to qualify to fish further beyond 18 km and thus promote expansion and growth of income. (4) Full implementation of the National Fisheries Research and Development Institute (NFRDI) to answer the growing needs of R & D in fisheries. Sometimes the fishing industry says that PhilRice is to rice, then NFRDI should be to fish to speed up the developments in R & D in fisheries. (6) Absentee Fishpond Lease Agreement holders should have their lease automatically cancelled by the government and should be forfeited in favor of the government and dispose to willing investors, to speed up the strengthening of the municipal fisherfolk. (7) The Fisheries Aquatic Management Councils should be set up and be operational in all coastal municipalities. (8) According to the Philippine Fisheries Code, BFAR should prepare and implement a comprehensive national fisheries development plan for long term sustainability. This should have been done in 1998. Up to this date, BFAR has not yet started preparing the plan.

The fishing industry capture fisheries and aqua culture are waiting for guidance from the government. Is there room for further markets? Investments? Where will they go and expand? What species shall we develop? What will be the concentration of public investments? To prepare for the expansion of the fishing industry under RA 8550, government has to create financial schemes. I would like to enumerate these schemes to give us an idea that the government has already set all the guidelines for this country to really develop its fisheries. These are (1) the Fishery Loan and Guarantee Fund of P100 M to finance the development of the fishing

industry; and (2) the Fishing Vessel Development Fund to enhance the building and acquisition of vessels to be administered by the DBP at P150 M yearly for 5 years. The fund is critical because our fishing vessels are aging and we need new and higher capacity vessels to address the potential increase in growth.

I hope the Department of Science and Technology through the PCAMRD and the Department of Agriculture through BFAR will join efforts to work out a workable fisheries plan with a very clear concern to consider the targets set in the medium term development plan. In the industry level, we have to see a discernible increase in unit productivity annually and an increase in the physical growth facilities like vessels, fish ponds, post harvest facilities and others.

Lastly, while we consider the fishing industry to be still a poor relation of agriculture, more efforts should be done to put fisheries in the forefront with agriculture towards 2020. I long to see the day when Philippine Agriculture 2020 will read as Philippine Agriculture and Fisheries 2020. Thank you.