

## TUNA: Towards a United National Action for a sustainable and competitive Philippine Tuna Industry

To maintain its spot as the second largest tuna-producing nation worldwide, the Philippines' public and private sectors must work together in creating sustainable, resilient, and adaptive action plans and policy agendas for the industry.

Over the years, tuna continued to be the country's top export commodity.

With a total volume of 134,412 metric tons for fresh/chilled/frozen, smoked/dried, and canned tuna products, exports were valued at USD 481 million in 2020 (BFAR Philippine Fisheries Profile, 2020).

Unfortunately, climate change, overfishing, and illegal fishing persistently endanger the tuna stock in the Philippine waters while global certification requirements tend to impede exports.

Moreover, the decomposition issue remains the number one food safety challenge in the seafood industry.

Seeing the need for a dialogue platform to discuss and address such issues, the Philippine Council for Agriculture and Fisheries (PCAF) partnered with the SOCSKSARGEN Federation of Fishing & Allied Industries, Inc. (SFFAI) to conduct the 22nd National Tuna Congress on



September 1-2, 2022 in General Santos Fishport Complex.

PCAF joined sixty-eight other private and public sector organizations in the Congress' exhibit and shared their respective contributions to the Philippine Tuna Industry.

Over 600 participants, composed of leading industry players and stakeholders, as well as government and non-government agency representatives, attended the event to talk about the latest updates and

developments in the international, domestic, and regional markets.

Plenary sessions were held in line with the Congress' theme "Philippine Tuna Industry: Braving Rough Seas Toward a Better Tomorrow".

Forum topics included current market trends and challenges, research and development studies and programs, and state-of-the-art technologies on information management, commercial fishing, and improving product quality and manufacturing processes.

### The Philippine Tuna Industry: Trends, Challenges and Prospects



#### Trends

- Demand on canned tuna is due to longer shelf-life, affordability, and convenience
- Consumption of lean, healthier, and low-calorie animal protein
- More responsible and environmental
- Popularity of premium products
- Diverse flavor and taste
- Skipjack Tuna as the leading species, with Yellowfin Tuna and Bluefin tuna growing more popular
- Fresh and ready-to-cook tuna to hold significant share in revenue
- Canned tuna as the leading product type, with flavored canned tuna being more popular



#### Challenges

- People shifting to plant-based products/protein
- Methylmercury issues
- Decomposition and food safety
- Meeting global certification requirements
- Competition is tough but doable
- Fish raw material supply is still a problem
- Free trade agreements
- Relying on guidance and support (market, technology, and financial) of EU to access USA



#### Prospects

##### Middle East

- Fastest growing region for tuna products
- Retail distributors venturing private label brands for canned seafood products
- Canned tuna manufacturers capturing markets through joint venture and partnerships
- Consider sustainability seals and social responsibility labels for added appeal

##### United States of America

- Market access is vast with the necessary GSP requirements
- US is the top export market for Philippine Commodities

## Steering the Ship towards Regulated Seas: Policy Resolutions Passed



PCAF Booth during the 22nd National Tuna Congress on September 1-2, 2022 in General Santos City

From the 15 plenary sessions of the two-day Congress, 21 key recommendations were drafted and presented.

As a major partner of SFFAII in the 22nd NTC, PCAF committed to supporting the endorsement of the policy resolutions.

The resolutions of national concern were already presented to the National Banner Program Committee for Fisheries and Aquaculture (NBPC on FA) during their third quarter meeting on September 27, 2022.

Meanwhile, the resolutions with regional scope will be cascaded to the nationwide network of private sector-led Agricultural and Fishery Councils for discussion and endorsement.

The resolutions pertaining to the National Tuna Management Plan and the Philippine National Tuna Industry Council will no longer be included in the endorsement since the NBPC on FA already discussed and adopted such resolutions in its previous meetings.

## Objectives of the National Tuna Congress

1. Enhance the knowledge of the participants on the status and latest development in the International and Philippine Tuna Industry
2. Thoroughly discuss issues and concerns affecting the industry
3. Craft sound policy resolutions to address identified issues which will be endorsed to concerned authorities
4. Enhance the image of the Philippines as a major player in the world's tuna industry
5. Improve networks, alliances, and business partnerships among local and international fishing groups
6. Update the Philippine Tuna Fisheries Profile and the National Tuna Management Plan

### Resolutions presented during 3rd quarterly meeting of NBPC on FA

- Urging the Office of the President through the Department of Finance (DoF) to revisit the Tax Reform and Acceleration and Inclusion Act (TRAIN Law), particularly Section 43 of RA 10963 that allows suspension of Excise Tax when petroleum prices become prohibitive
- Urging the Office of the President through the DoF to provide a mechanism to exempt the Fishing and Fishery Activities from the imposition of VAT on all Vatable Inputs whenever petroleum price becomes prohibitive
- Urging the DA-BFAR to strictly implement Fisheries Administrative Order (FAO) 259 S. 2018, "Rules and Regulations on the Importation of Frozen Fish and Fishery/Aquatic Products for Wet Market during Closed and Off-Fishing Seasons or during the Occurrence of Calamities", to protect local tuna producers in relation to fish importation
- Urging the National Economic Development Authority Investment Coordination Committee to fast-track the review of the Unsolicited Proposals relative to the upgrading of services of the Port of General Santos
- Requesting the DA-BFAR to maintain strong representation and active participation in Regional Fisheries Management Organizations with representations

from relevant stakeholders

- Requesting the DA-BFAR to fast-track the issuance of the FAO on the management of sharks in consonance with the WCPFC CMMS on sharks
- Requesting the DA-BFAR for the Issuance of an FAO on By-Catch and Endangered, Threatened and Protected Species Management
- Requesting the DA-BFAR for an assessment of bait fish used by the Tuna Handline Fishery
- Requesting the DA-BFAR for the review and amendment of the FAO 244 S. 2012, otherwise known as the Fish Aggregating Device Management Policy

### Resolutions for cascading to AFCs

- Supporting the establishment of the BFAR Satellite Office in General Santos City Fishport Complex and upgrade the BFAR 12 Regional Fisheries Laboratory by means of fund allocation
- Requesting the DA-BFAR, Department of Science and Technology (DOST), and the LGU of General Santos City to support the upgrading of capabilities of the PhilExport 12 Quality Control Laboratory
- Requesting the Department of Information and Communications Technology to establish a National Telecommunications Commission Satellite Office in General Santos City to facilitate ease of Registration and Licensing of Radio and Telecommunications Equipment used by Fishing Operators

- Requesting the LGU of General Santos City to create a City Fisheries Office
- Endorsing the Establishment of an Independent & Full-Fledged Office of the Department of Trade and Industry in General Santos City
- Requesting the Philippine Crop Insurance Corporation Region XII to establish a Satellite Office in General Santos City to facilitate the immediate processing of applications and claims of fisherfolks
- Requesting the Office of the President to extend the coordination function of the South Cotabato/Cotabato/Sultan Kudarat/Sarangani/General Santos City Area Development Project Office for the Years 2023 to 2028
- Enjoining the Higher Education Institutions in Region 12 to apply as Niche Centers in the Regions for research and development under the Science for Change Program of the DOST
- Requesting the Department of Energy (DOE) to fast-track the implementation of the Wholesale Electric Spot Market Program in Mindanao, providing bulk users, such as tuna manufacturers, direct access to the power system and subsequently lower production costs

### Resolutions endorsed by the NBPC on FA

- Requesting the DA-BFAR to issue a Special Order Reconstituting the Philippine National Tuna Industry Council
- Requesting the DA-BFAR to review and update the National Tuna Management Plan of 2018