

PCAF

QUARTERLY



PCAF releases DA's Commodity Industry Roadmaps on its website (part 1)

Twenty Commodity Industry Roadmaps (CIR) are now available on the official website of the Philippine Council for Agriculture and Fisheries (PCAF).

Days after the official launch of the CIRs on June 17, 2022 at the Department of Agriculture (DA) National Management Committee Meeting, PCAF released the copies on www.pcaf.da.gov.ph.

Aside from publication and dissemination entrusted to PCAF, the agency also conducted series of consultations to various stakeholders. It was during the National Food

Security Summit on May 18 to 19, 2021, when DA saw the effectiveness of engaging a wide range of stakeholders in harnessing participation of the agriculture and fishery value chain players.

Through the issuance of a Special Order No. 654, s. 2021, DA created the Agriculture and Fishery Commodity Industry Roadmap Development Teams (CIR-RDTs) and designated Focal Persons to spearhead the formulation of each roadmap and guarantee the involvement of stakeholders and their ownership of the industry process and outputs.

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The CIR-RDTs is composed of the industry players and technical experts from the various government industries.

PCAF, as DA's participatory arm, is tasked to ensure the active participation of stakeholders and government agencies and facilitate and provide full Secretariat Support in the consultation activities for each commodity program. It also prepared the detailed budget required to successfully accomplish tasks that the agency and commodity programs would fund.

DA allocated PhP5M for each roadmap to PCAF taken from the commodity programs. Technical secretariat from PCAF designated as focal persons for the CIRs and the drafts were presented to the respective NBPCs.

At the September 15 Management Committee meeting, Secretary William Dar directed PCAF, through OIC Executive Director Liza Battad, to "oversee the completion of all commodity roadmaps" within 2021.

The approved CIRs are the following:

Fisheries and Aquaculture

- * Philippine Shellfish Industry Roadmap
- * Philippine Shrimp Industry Roadmap
- * Philippine Seaweed Industry Roadmap
- * Philippine Tilapia Industry Roadmap
- * Philippine Milkfish Industry Roadmap

High Value Crops

- * Philippine Abaca Industry Roadmap
- * Philippine Coffee Industry Roadmap
- * Philippine Cacao Industry Roadmap
- * Philippine Vegetable Industry Roadmap
- * Philippine Mango Industry Roadmap
- * Philippine Banana Industry Roadmap
- * Philippine Onion Industry Roadmap
- * Philippine Coconut Industry Roadmap

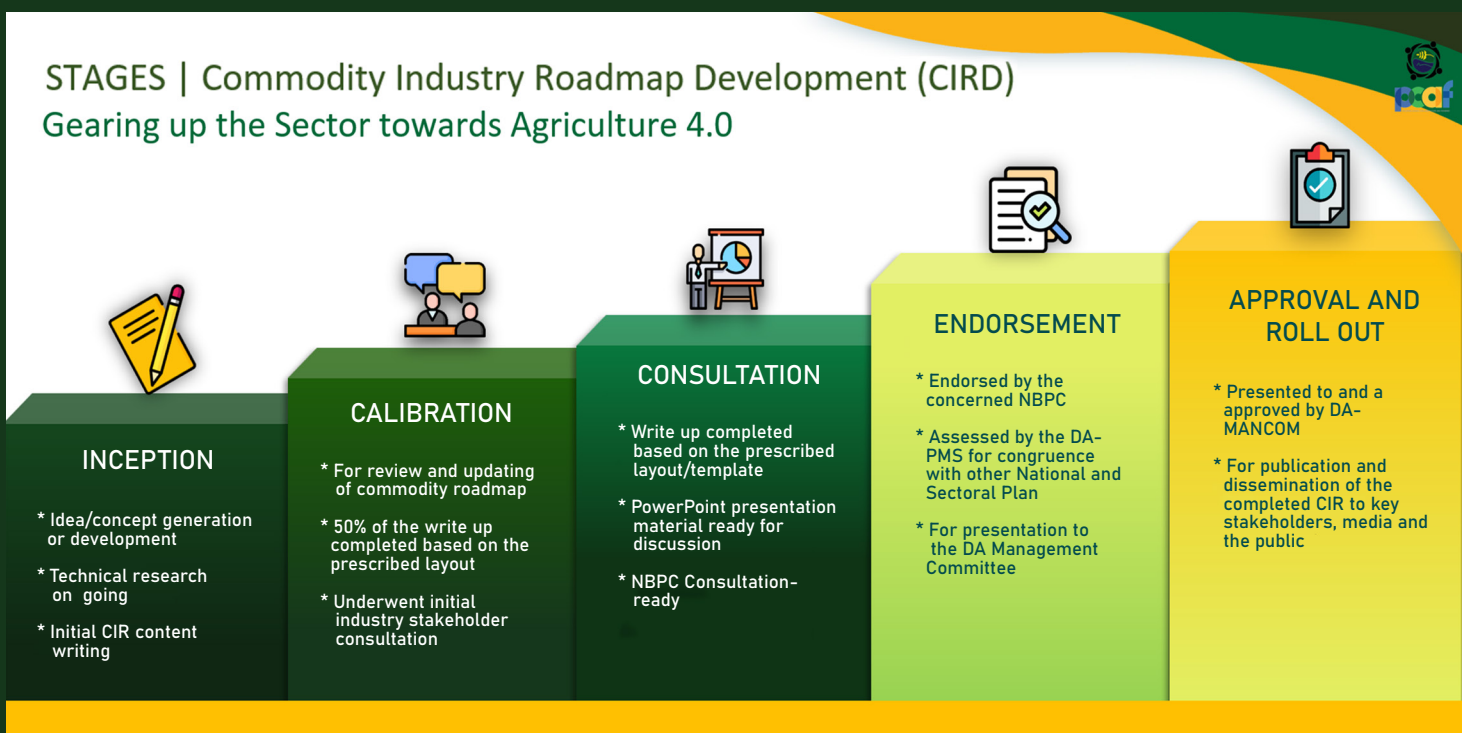
Poultry, Livestock, and Corn

- * Philippine Dairy Industry Roadmap
- * Philippine Carabao Industry Roadmap
- * Philippine Yellow Corn Industry Roadmap
- * Philippine Small Ruminants Industry Roadmap
- * Philippine Hog Industry Roadmap
- * Philippine Poultry Broiler Industry Roadmap
- * Philippine Poultry Layer Industry Roadmap

"They are symbols of our commitment to push forward and operationalize the major strategies of the OneDA Reform Agenda," said former DA Assistant Secretary-designate for Regulations and PCAF OIC Executive Director Liza Battad during the official launch.

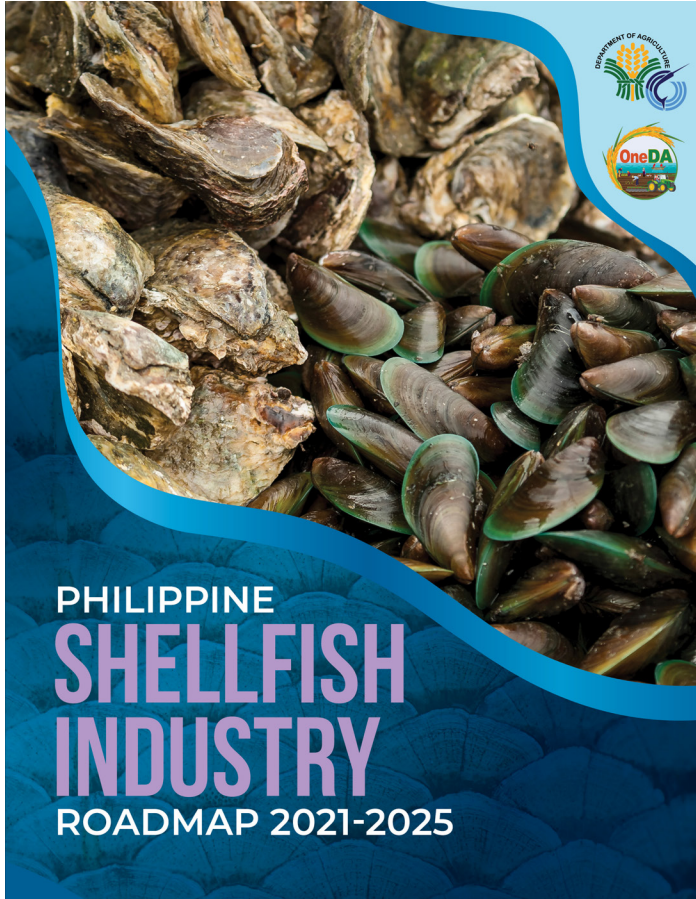
Find out more about the CIRs in this special edition of the PCAF Quarterly as the agency gives a glimpse on each CIR.

For this issue, PCAF will focus on the Fisheries and Aquaculture and one High Value Crop. ■



CIR in Focus: **Fisheries and Aquaculture**

1. Shellfish



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The oyster and mussel industry in the Philippines contributes significantly to the livelihood of marginal fisherfolks in estuaries and coastal areas. The industry has supplied low-cost but high-quality protein in the country for many decades.

Even then, the industry remained a backyard venture and most of the culture practices remain traditional.

Many problems confronting the shellfish industry were identified in the past. However, many of these challenges are still in the industry.

The problems include siltation and pollution, red tide or Harmful Algal Bloom (HAB), inadequate infrastructure support from the government, land reclamation and urbanization, limited market demand and low prices for the shellfishes, uncertainty of seed supply, and inadequate sanitary plan in highly populated urban areas, and lack of shellfish processing program before market.

The TNT Roadmap shall implement the National Shellfish Development Program (NSDP) that offers strategies to increase production through sustainable optimization of farming efforts and advanced technologies.

The focus shall be on the evaluation of farming areas for oysters and mussels, promotion of modern farming and post-harvest technologies, developing manpower experts on oysters and mussels, and extensive technology programs.

Goals

- * Increase production by 25% in 5 years (55 annual increase according to PSA, 20220)
- * Increase number of fisherfolk engaged in shellfish farming by 5% in 5 years. 10% in 10 years and by 25% in 20 years
- * Ensure quality and traceability of inputs and outputs
- * Develop 40 TnT experts in the Philippines (at least two experts per region)
- * Ensure reliable seed supply of mussels and oysters through the establishment of BFAR and private hatchery facilities
- * Reseeding of economically important species like *Crassostrea iredalei* (commonly known as the Philippine cupped oyster or slipper oyster) and *Perna viridis* (known as the Asian green mussel) to areas with small species
- * Strengthen the implementation of the Philippine National Shellfish Sanitation Program through profiling of all existing and potential areas for shellfish culture for classification according to physicochemical, biological status of the areas
- * Adoption of all available value-adding technologies for mussels and oysters at the farmer's level

Objectives

To achieve sustainable growth of the mussel and oyster industry to contribute to the overall food production and food security of the country and increase income for various stakeholders with consideration to the capacity of the environment.

2. Shrimp



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Value Chain Analysis (VCA)

Shrimp aquaculture industry is one of the sources of income of the people living in inter-tropical countries of Southeast Asia and other inter-tropical developing countries. It is one of the most important species that is traded globally at a high value, with the Philippines as one of the leading countries that export shrimp.

As a net exporter of shrimp, the country's export earnings register PhP2.18 billion for 2019 alone. In the same year, shrimp ranked fourth among the major fisheries export commodities next to tuna (PhP24.6 billion), seaweeds (PhP12.9 billion) and crabs (PhP5.1 billion).

The country exports various types of processed shrimp and shrimp products, including frozen, head-on shell-on, peeled and deveined.

Objectives

The study aims to lay the foundation for strategic planning and improving the aquaculture shrimp industry processes and critical decision making. Specifically, the study will:

a) Provide an in-depth understanding of the range of

3. Seaweeds

The seaweeds commodity roadmap is formulated essentially to identify aspects of the industry that necessitates sets of initiatives in the short-, medium- and long-term, that will eventually form the basis of a more consistent and coherent policy and program support of the Department of Agriculture.

The intention of the roadmap is to develop a detailed strategic plan for the Philippine seaweeds industry to guide its progress towards the goal of regaining its position in the international seaweeds industry.

During the Industry Seaweed Stakeholders' Consultation, the participants mostly from the private sectors agreed that the seaweed industry roadmap would only cover the short term (5 years) considering that there's no way to project the medium and long term because of the pandemic situation.

Seaweeds have been utilized all throughout the world for so many years now. Not only that it has afforded food for the populace but also livelihoods for the people through the growing and trading of seaweeds. Seaweeds are equally important in the Philippines.

As one of the most economically important fishery products in the country, seaweeds make up about 70 percent of the total aquaculture production and ranks as one of the top three exports of the country consistently.

Only a small portion of seaweeds are consumed as food in the Philippines. Much of the production is for carrageenan, which remains the major seaweed product shipped abroad.

structural and dynamic elements or factors that affect the performance of key chains in major producing regions;

b) Provide an in-depth understanding of the market and economic opportunities that can potentially drive more beneficial and sustained inclusion of small shrimp farmers and players into the shrimp value chains through a dynamic process of change;

c) Identify, through a participatory process, the systemic chain level issues that hinder or promote the gainful participation of all stakeholders, sustainability of the chains, and their competitiveness in general;

d) Use a participatory approach, identify and prioritize interventions needed to overcome bottlenecks throughout the key chain/s that would foster industry competitiveness and climate change resiliency; and,

e) Identify and explore how to catalyze private and public sector stakeholders in the shrimp industry to collaborate for improved industry performance.

Comprising approximately 94 percent of the total seaweed export value, the seaweeds industry is regarded as an export industry.

Goals

- * Increased Production of Quality Raw Dried Seaweeds to 2% Annually in the Next 5 years (2021-2025)
- * Increased Income of Seaweed Farmers by 25-50%
- * Improved Marketing Linkages of Seaweed Farmers
- * Capacitated Seaweeds Farmers and Farmer Organizations
- * Promoted Community-based value-added products and fresh seaweeds for food and nutrition security
- * Addressed threats affecting the integrity and superiority of the Philippine seaweed/carrageenan

Objective

The general objective of this roadmap is to develop a detailed strategic plan for the Philippine seaweeds industry that will guide progress towards its goal of regaining its position in the international seaweeds industry and be the “Preferred Seaweed and Carrageenan Supplier in the Global Market”.

Specifically, this roadmap seeks to:

1. Present the current situation, performance, and outlook of the industry as well as the market trends and prospects;
2. Provide an analysis of the industry in terms of its structure, strengths, weaknesses, opportunities, and threats (SWOT), farm income, benchmarks and competition;

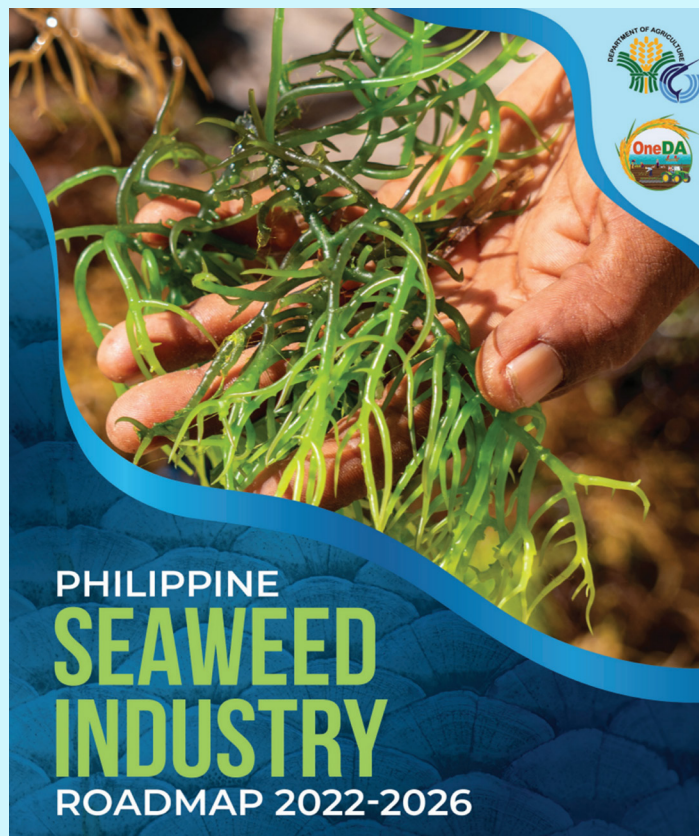
4. Tilapia

The Philippine Tilapia Industry Roadmap would serve as a blueprint for the sustainable development of the industry.

The plans that were formulated and identified are inclusive, attainable, market-driven and attuned to the needs of the industry. It seeks to address three general questions: where are we?, where do we want to go?, and how do we get there?

The report presents the vision, mission, goals, plans and targets for the industry.

It is a product of industry consultations (virtual consultation and meeting with heads of BFAR Regional Fisheries Production and Support Services Division and



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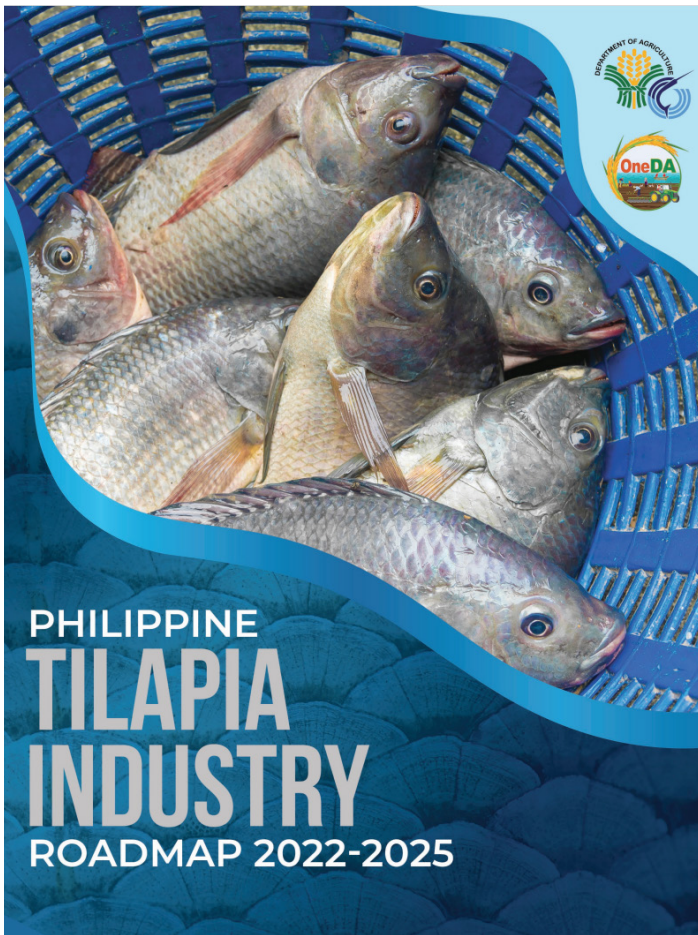
3. Define the short- (2022-2026) direction of the seaweeds industry;
4. Determine the needed strategies, policies, and programs to reach its goal, including the required investment and support from the private sector; and
5. Identify the relevant stakeholders and define the roles and responsibilities they will play in implementing the roadmap.

Technology Outreach Stations and tilapia focal persons nationwide), interviews of key informants and industry survey from the hatchery and grow out operators, feed and fish processors were also undertaken.

Goals

- * Increase tilapia production from 304,326.59MT (2020) to 352,797.9MT (2025)
- * Ensure quality and traceability of inputs and outputs
- * Promotes use of environment friendly tilapia feeds and reduce cost of feeds and reduce cost of feed production by utilizing locally sourced raw materials Improve and/or develop a more efficient marketing system for the tilapia industry

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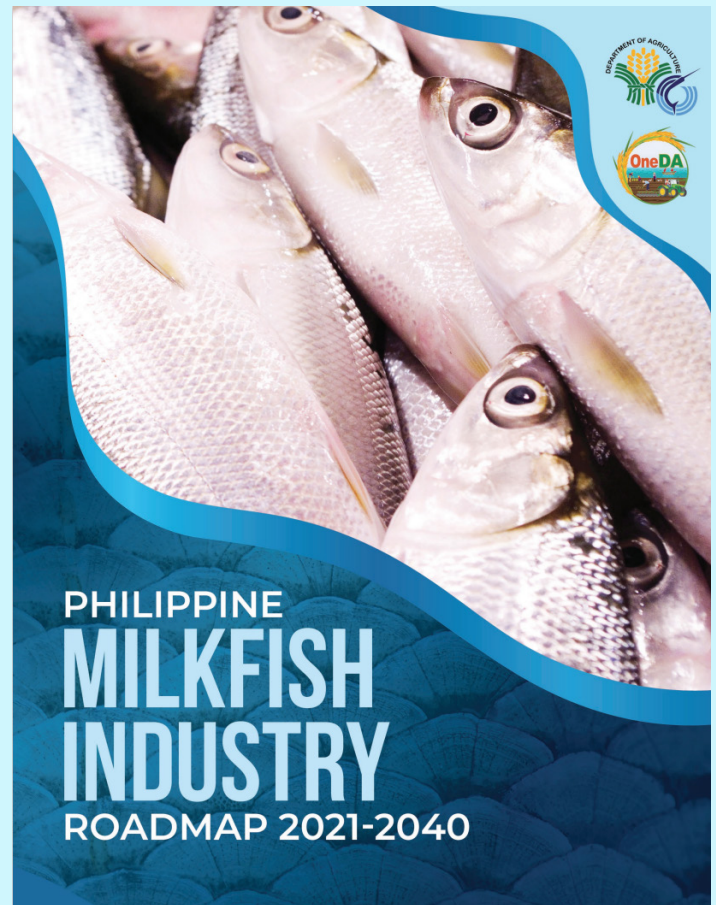
Objective

The main objective was to craft a Philippine Tilapia Industry Roadmap that would serve as a blueprint for the sustainable development of the industry.

The plans formulated are inclusive, attainable, market-driven and attuned to the needs of the industry. Specifically, the roadmap aims to:

1. Present the current status of the tilapia industry in the country;
2. Analyze the supply/value chain and market trends;
3. Analyze determinants of global competitiveness in terms of technical parameters of production, price and cost faced by the tilapia producers and stakeholders across farms and countries;
4. Set goals, strategies and targets on how to achieve a competitive and sustainable tilapia industry; and
5. Recommend strategic directions and action programs to enhance the Philippine Tilapia Industry.

5. Milkfish



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CIR in Focus: High Value Crops

6. Onion

The Onion Industry Roadmap is part of the High Value Crops (HVC) Subsector Roadmap which outlines how the Philippines can address three major challenges: achieving self-sufficiency while lifting farmers from poverty, preparing for the advent of the ASEAN Economic Community (AEC), and adapting to climate change.

The Onion Industry Roadmap seeks to address the following: (a) Where are we? (b) Where do we want to go? and (c) How do we get there?

It provides a situational assessment of the industry and its competitiveness as well as an analysis of the supply and value chain, market trends and prospects, goals, and objectives.

These questions flesh out the shared vision and targets and strategic recommendations to achieve the set goals and targets.

The Philippine Milkfish Industry Roadmap defines the short- (2021-2025), medium- (2026-2030) and long-term (2031-2040) plans for sustainable development of the milkfish industry.

It also outlines the roles and responsibilities of various sectors including the government and non-government agencies, research and academic institutions, as well as the private sector in achieving the common goals and targets set for the industry.

In crafting this Industry Roadmap, the value chain approach was used as the primary planning tool. Moreover, the roadmap is also aligned to the Food Security Plan Framework of the Department of Agriculture (DA) and with the One-DA Reform Agenda.

With the “new normal” situation due to COVID-19 pandemic, consultation-workshops and meetings with milkfish hatchery operators, farmers, processors, traders, research institutions, and Regional Milkfish Focal Persons were done online.

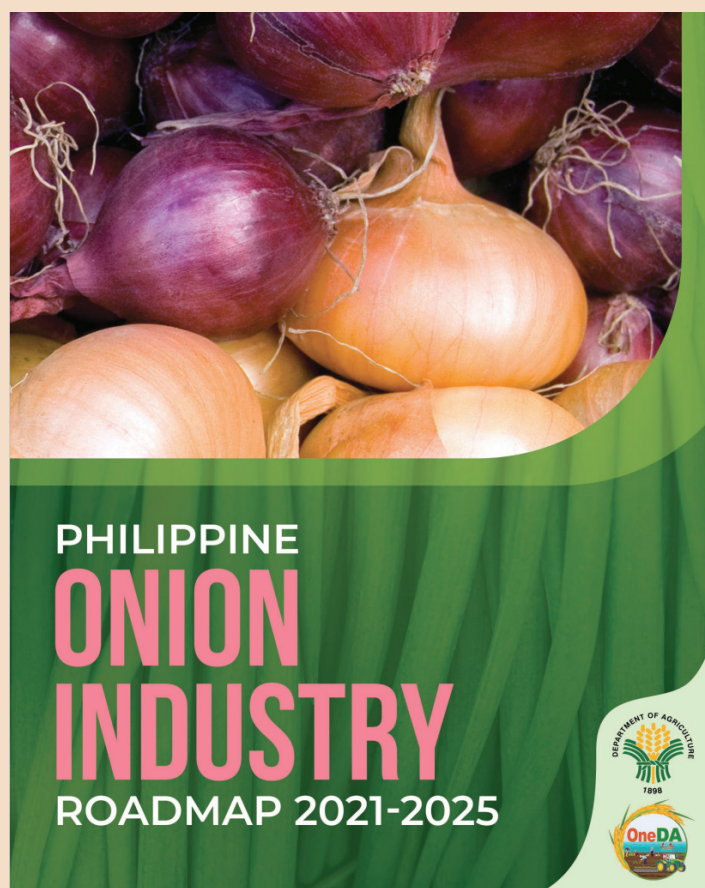
Secondary data from Philippine Statistics Authority (PSA), Bureau of Agricultural Statistics (BAS), Bureau of Fisheries and Aquatic Resources (BFAR) Provincial/Regional Offices, DA) websites of international organizations like the Food and Agriculture Organization (FAO) Fisheries and Aquaculture Statistics and internet searches were also utilized.

Goals

- * Self-sufficiency in milkfish fry
- * Sustainable production growth
- * World-class value-added products
- * Increased income of milkfish farmers
- * Strengthened and updated policies for enabling environment

Objectives

- * To increase local production of milkfish fry
- * To improve farming practices and develop milkfish technologies that will contribute to the increased efficiency in milkfish production.
- * To improve traceability and food safety that will contribute to an increased quality and quantity of value-added products.
- * To organize and cluster milkfish farmers into cooperatives to work as “Collective Entrepreneurs”.
- * To review and update existing fishery regulations and implement new policies necessary to capacitate the industry.



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Goals

- * Increase total production
- * Increase production of yellow onion and shallots by 10% per year for targeted niche market
- * Ensure food safety, enhance off-season production and improve storage facilities
- * Enhance seed systems, enhance post-production and logistics facilities
- * Strengthen marketing linkages/systems and support services
- * Minimize production cost and postharvest losses
- * Strengthen analytical service laboratories
- * Enhance pest and disease forecasting capability
- * Ensure balanced supply
- * Develop more varieties

* Develop crop protection systems and decision support tools

* Improve processing and value-adding systems

* Organize the production sector

* Protect onion growers from losses and ensure equitable access to resources and opportunities

Objectives

By updating the Onion Industry Roadmap, the onion industry is continuously supported towards competitiveness and modernization by reviewing current economic performance and milestones.

In detail, the objectives of this roadmap are to:

1. Provide information about the current industry situation and prospects

2. Analyze and improve the value chain

3. Set the directions and priorities through multi-stakeholder consultations and decision-making

4. Recommend strategies and lay down the required investments to meet increasing domestic and export demand

5. Anchor the policies and programs to the food security framework following the “OneDA” and “One Nation” approach with the vision of a food secure and resilient Philippines with empowered and prosperous farmers and fisherfolk



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