

FISHERIES SITUATION

April - June 2003

Abstract

Fisheries output during the second quarter rose from 886.41 thousand metric tons in 2002 to about 936 thousand metric tons in 2003. The growth from municipal and commercial fisheries was estimated at 10.11 percent and 1.50 percent, respectively, while harvest from aquaculture grew by 5.72 percent

Of the total fisheries production, aquaculture had a share of 38 percent while commercial and municipal fisheries contributed 32 percent and 30 percent, respectively.

The output gain in fisheries sector by 5.59 percent was attained in most of the regions. The good weather condition during the quarter which enabled most fishermen to increase their fishing trips attributed to the increase in output. Similarly, aqua farm operators were able to produce more with the usage of quality fingerlings and improved management practices in a number of farms harvested during the quarter.

Fig. 1 Fisheries Production by Subsector, Philippines, April - June 2001 - 2003

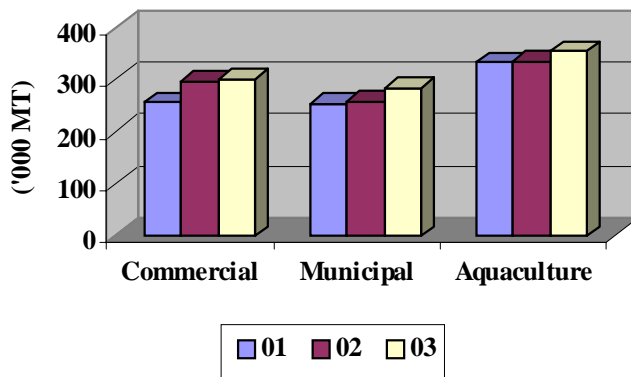


Fig. 2 Percent Distribution of Fish Production by Subsector, Philippines, April - June 2001-2003

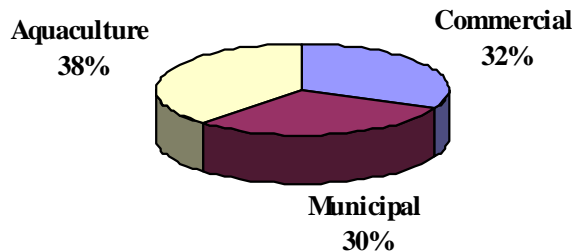


TABLE 1. FISHERIES PRODUCTION BY SUB-SECTOR AND BY REGION, PHILIPPINES, APRIL - JUNE 2001 - 2003

(METRIC TONS)

REGION	FISHERIES			COMMERCIAL			MUNICIPAL			AQUACULTURE					
	2001	2002	2003	2001	2002	2003 ^{*/}	2001	2002	2003 ^{*/}	2001	2002	2003 ^{*/}			
			% CHANGE 03/02				% CHANGE 03/02				% CHANGE 03/02				
PHILIPPINES	840,285.8	886,413.8	935,938.3	5.59	254,881.0	295,331.0	299,765.0	253,350	257,096	283,076	10.11	332,054.8	333,986.8	353,097.3	5.72
CAR	724.0	646.0	581.2	(10.03)				299	281	243	(13.52)	425.0	365.0	338.2	(7.34)
I	20,588.0	18,976.5	20,193.1	6.41	468.0	788.0	1,164.0	7,256	7,046	7,461	5.89	12,864.0	11,142.5	11,568.1	3.82
II	9,999.6	10,561.6	12,616.4	19.46	3,774.0	4,430.0	4,970.0	5,021	4,815	5,826	21.00	1,204.6	1,316.6	1,820.4	38.27
III	55,254.0	55,085.3	59,000.4	7.11	3,758.0	2,978.0	3,461.0	3,687	4,594	5,022	9.32	47,809.0	47,513.3	50,517.4	6.32
NCR - M.M.	44,576.0	57,649.0	57,239.1	(0.71)	42,967.0	56,692.0	56,255.0	750	431	477	10.67	859.0	526.0	507.1	(3.59)
IV - A	91,510.0	93,703.0	86,626.1	(7.55)	26,241.0	27,500.0	24,230.0	34,219	31,868	26,311	(17.44)	31,050.0	34,335.0	36,085.1	5.10
IV - B	56,483.0	69,105.0	87,773.4	27.01	8,481.0	8,903.0	9,685.0	25,610	35,890	47,347	31.92	22,392.0	24,312.0	30,741.4	26.45
V	39,332.0	42,187.5	46,601.2	10.46	6,969.0	9,401.0	10,469.0	22,411	23,969	27,266	13.76	9,952.0	8,817.5	8,866.2	0.55
VI	102,443.2	99,066.5	106,912.7	7.92	33,551.0	32,797.0	31,729.0	37,344	34,503	37,147	7.66	31,548.2	31,766.5	38,036.7	19.74
VII	44,248.0	44,133.0	46,281.6	4.87	11,491.0	10,899.0	10,776.0	9,570	10,432	10,475	0.41	23,187.0	22,802.0	25,030.6	9.77
VIII	22,760.0	22,059.0	30,427.4	37.94	8,984.0	8,661.0	12,305.0	10,914	10,024	14,227	41.93	2,862.0	3,374.0	3,895.4	15.45
IX	121,657.0	139,927.3	142,273.9	1.68	43,161.0	61,152.0	56,218.0	36,945	36,057	40,148	11.35	41,551.0	42,718.3	45,907.9	7.47
X	19,487.0	22,320.3	27,615.5	23.72	9,002.0	11,467.0	12,752.0	6,665	6,593	7,865	19.29	3,820.0	4,260.3	6,998.5	64.27
XI	10,837.0	10,883.7	11,628.7	6.85	2,497.0	2,472.0	3,346.0	6,404	6,104	5,850	(4.16)	1,936.0	2,307.7	2,432.7	5.42
XII	47,619.0	51,605.1	60,426.3	17.09	35,676.0	39,084.0	44,663.0	9,459	9,579	10,342	7.97	2,484.0	2,942.1	5,421.3	84.27
ARMM	125,454.0	121,748.0	113,941.7	(6.41)	16,837.0	16,962.0	16,509.0	19,216	17,737	17,639	(0.55)	89,401.0	87,049.0	79,793.7	(8.33)
CARAGA	27,314.0	26,757.0	25,799.6	(3.58)	1,024.0	1,145.0	1,233.0	17,580	17,173	19,430	13.14	8,710.0	8,439.0	5,136.6	(39.13)

^{*/} Preliminary

Commercial Fisheries

Commercial fishing posted moderate changes in the volume of fish unloaded during the 2nd quarter of 2003 compared to the same quarter last year. Production for this quarter was estimated at 299,765 metric tons, (1.50%) or 4,434 metric tons above that of last year's level. The increase was attributed to the predominantly good weather that prevailed during the quarter which enabled most fishermen to spend more time on fishing. The production gain was likewise a result of abundant catch of in-season species like roundscad, Indian sardines, skipjack, yellowfin tuna and Indian mackerel in most of the regions. Moreover, the positive growth in production was attributed to the strict implementation of anti-poaching law and intensive campaign against illegal fishing activities. Commercial fish catch unloaded in private, Local Government Unit (LGU) and traditional landing centers exhibited an increasing trend. The production gain in private landing centers was less than half percent (0.41%) or about 235 metric tons. Local Government Unit and traditional landing centers incurred production gain of 529 metric tons (7.24%) and 3,743 metric tons (2.48%), respectively. Fish catch unloaded in PFDA ports, on the other hand, decreased by 73 metric tons (0.09%).

Most of the regions (10 regions) fared well during the quarter. Region I surpassed its last year's production by 376 metric tons (47.72%). The increase was largely a result of clearing and widening of navigational lane in Dagupan City and increased number of commercial fishing boats previously operating as dry docked vessels were back in operation in La Union. The increase of fish catch in Region VIII by 3,644 metric tons (42.07%) and the growth in Region XI by 874 metric tons (35.36%) were due to generally fair weather which favored fishing activities for both regions. Likewise, other fish species like roundscads, Indian sardines, yellowfin tuna, big eyed scad, etc. were seasonally abundant thus, encouraging more fishing trips.

On the other hand, commercial fish catch dropped in six (6) regions. Production in Region IV-A slid by 3,270 metric tons (11.89%). The decrease was attributed to lesser fishing activities caused by strong winds and rough seas brought about by typhoon Chedeng and Egay especially in Quezon province. Similarly, production in Region IX went down by 4,934 metric tons (8.07%). The decline in production resulted from early occurrence of weather disturbance specifically storm Chedeng and major repair of some boats during the period in Zamboanga del Norte. Likewise, Zamboanga City exhibited a downward trend in production owing to a sizeable drop in unloading from private landing centers by 7,358 metric tons (26.98%) since Permex company stopped processing sardines for the whole quarter. The rest of the regions, however, experienced minimal decline in their unloadings.

TABLE 2. COMMERCIAL FISH PRODUCTION BY REGION AND BY TYPE OF LANDING CENTER, PHILIPPINES, APRIL - JUNE 2001 - 2003

(METRIC TONS)

REGION	COMMERCIAL			% CHANGE 03/02	PRIVATE			% CHANGE 03/02	PFDA			% CHANGE 03/02	LGU			% CHANGE 03/02	TRADITIONAL			% CHANGE 03/02
	2001	2002	2003		2001	2002	2003		2001	2002	2003		2001	2002	2003		2001	2002	2003	
PHILIPPINES	254,881	295,331	299,765	1.50	43,460	56,627	56,862	0.41	61,845	80,764	80,691	(0.09)	7,067	7,310	7,839	7.24	142,509	150,630	154,373	2.48
CAR																				
I	468	788	1,164	47.72					82	291	131	(54.98)					386	497	1,033	107.85
II	3,774	4,430	4,970	12.19													3,774	4,430	4,970	12.19
III	3,758	2,978	3,461	16.22													3,758	2,978	3,461	16.22
NCR - M.M.	42,967	56,692	56,255	(0.77)					41,968	56,172	55,699	(0.84)					999	520	556	6.92
IV - A	26,241	27,500	24,230	(11.89)					1,421	2,796	2,724	(2.59)					24,820	24,704	21,506	(12.95)
IV - B	8,481	8,903	9,685	8.78													8,481	8,903	9,685	8.78
V	6,969	9,401	10,469	11.36	3,150	2,362	2,834	19.98									3,819	7,039	7,635	8.47
VI	33,551	32,797	31,729	(3.26)	1,106	1,349	1,692	25.43	4,215	4,004	2,315	(42.18)	6,107	6,370	6,765	6.20	22,123	21,074	20,957	(0.56)
VII	11,491	10,899	10,776	(1.13)													11,491	10,899	10,776	(1.13)
VIII	8,984	8,661	12,305	42.07													8,984	8,661	12,305	42.07
IX	43,161	61,152	56,218	(8.07)	13,409	27,269	19,911	(26.98)	3,748	3,731	6,456	73.04					26,004	30,152	29,851	(1.00)
X	9,002	11,467	12,752	11.21									960	940	1,074	14.26	8,042	10,527	11,678	10.93
XI	2,497	2,472	3,346	35.36	15	17	25	47.06	1,351	1,197	2,045	70.84					1,131	1,258	1,276	1.43
XII	35,676	39,084	44,663	14.27	25,780	25,630	32,400	26.41	9,060	12,573	11,321	(9.96)					836	881	942	6.92
ARMM	16,837	16,962	16,509	(2.67)													16,837	16,962	16,509	(2.67)
CARAGA	1,024	1,145	1,233	7.69													1,024	1,145	1,233	7.69

Municipal Fisheries

The performance of municipal fisheries during the second quarter was a remarkable improvement from the previous year's record. Total municipal fish production leapt from 257,096 metric tons to 283,076 metric tons or an increase of 10.11 percent compared to the same quarter last year.

Marine sub-sector, which accounted for nearly 90 percent of the total municipal production, recorded an unprecedented growth of 13.70 percent or an additional 30,455 metric tons to last year's output of 222,231 metric tons. Meanwhile, fish caught from inland waters like rivers, lakes, swamps, creeks and marshes declined by 12.84 percent or a reduction of 4,475 metric tons from last year's record of 34,805 metric tons. Despite the output decrease in inland sub-sector, sustenance fishing managed to perform impressively during the last quarter.

For marine sub-sector, almost all regions recorded positive output ranging from 0.41 percent to 41.45 percent. Among the highest gainers were Region VIII (41.45%), Region IV-B (32.09%), Region II (22.87%), Region X (19.06%), Region V (13.65%) and Region IX (11.36%). Only Region IV-A and Region XI failed to surpass last year's production with 2.88 percent and 4.21 percent decrease in production, respectively.

In terms of absolute figures, Regions IV-B, IX, VIII, V, VI and CARAGA were the top regions that posted big increments in quantity of fish landed. Region IV-B (MIMAROPA) got the biggest additional unloadings at 11,459 metric tons, followed by Region IX at 4,085 metric tons and Region VIII at 4,075 metric tons.

Notably, municipal fishermen prompted to engage in heavy fishing during the second quarter due to good weather and the abundance of different species like roundscad, tuna, sardines, etc. The strict enforcement of fishery laws on illegal fishing by the local government units through the "Bantay Dagat" and "Bantay Kalikasan" programs as well as lesser competition with commercial fishing vessels encroaching in municipal waters also contributed to the good performance of municipal fisheries. It was also observed that fish sanctuaries and additional aggregating devices were put up. An increase in the volume of gathered marine products like sea cucumber and assorted kinds of shells, both for export and local consumption purposes, was also registered.

Fishing from inland waters slumped further in the second quarter of the year with a decrease of 12.84 percent. Output of inland fishing households from Region IV-A, CAR and ARMM went down by 25.81 percent, 13.52 percent and 8.48 percent, respectively.

The production loss of 5,222 metric tons in Region IV-A was credited to the declining shell gathering in Rizal with a shortfall of about 40 percent from previous year's level. More shell gatherers were discouraged to collect shells due to dwindling demand from aquafarm operators. The improved output from fish caught in the province did not offset the decrease in the production of shells.

The low water level at the fishing grounds in the provinces of Abra, Ifugao and Kalinga due to prolonged dry spell caused inland fishing in Cordillera Autonomous Region (CAR) to slip by 13.52 percent. Meanwhile, ARMM region posted a decrease of 8.48 percent in freshwater production in Liguasan Marsh due to peace and order situation.

Fishing in inland waters in Regions VIII, VI, X and V posted incremental rates of 65.98 percent, 26.71 percent, 24.63 percent and 22.76 percent, respectively. Other regions exhibited increases in volume of fish catch due to continued fingerling dispersal by BFAR in major rivers and lakes and the abundance of mollusks like clams in Cagayan. Also, fish from aquafarms that overflowed due to flash floods were caught in rivers thus contributing to increase in the catch in inland fishery.

TABLE 3. MUNICIPAL FISH PRODUCTION BY SUB-SECTOR AND BY REGION, PHILIPPINES, APRIL - JUNE 2001 - 2003

(METRIC TONS)

REGION	MUNICIPAL			% CHANGE 03/02	MARINE			% CHANGE 03/02	INLAND			% CHANGE 03/02
	2001	2002	2003		2001	2002	2003		2001	2002	2003	
PHILIPPINES	253,350	257,096	283,076	10.11	217,464	222,231	252,686	13.70	35,886	34,865	30,390	(12.84)
CAR	299	281	243	(13.52)					299	281	243	(13.52)
I	7,256	7,046	7,461	5.89	7,075	6,766	7,141	5.54	181	280	320	14.29
II	5,021	4,815	5,826	21.00	3,832	3,267	4,014	22.87	1,189	1,548	1,812	17.05
III	3,687	4,594	5,022	9.32	2,988	3,094	3,395	9.73	699	1,500	1,627	8.47
NCR - M.M.	750	431	477	10.67	750	431	477	10.67				
IV - A	34,219	31,868	26,311	(17.44)	11,841	11,635	11,300	(2.88)	22,378	20,233	15,011	(25.81)
IV - B	25,610	35,890	47,347	31.92	25,448	35,706	47,165	32.09	162	184	182	(1.09)
V	22,411	23,969	27,266	13.76	22,186	23,679	26,910	13.65	225	290	356	22.76
VI	37,344	34,503	37,147	7.66	36,991	34,226	36,796	7.51	353	277	351	26.71
VII	9,570	10,432	10,475	0.41	9,551	10,401	10,444	0.41	19	31	31	-
VIII	10,914	10,024	14,227	41.93	10,750	9,830	13,905	41.45	164	194	322	65.98
IX	36,945	36,057	40,148	11.35	36,861	35,957	40,042	11.36	84	100	106	6.00
X	6,665	6,593	7,865	19.29	6,479	6,321	7,526	19.06	186	272	339	24.63
XI	6,404	6,104	5,850	(4.16)	6,348	6,038	5,784	(4.21)	56	66	66	-
XII	9,459	9,579	10,342	7.97	5,532	5,914	6,250	5.68	3,927	3,665	4,092	11.65
ARMM	19,216	17,737	17,639	(0.55)	13,952	12,669	13,001	2.62	5,264	5,068	4,638	(8.48)
CARAGA	17,580	17,173	19,430	13.14	16,880	16,297	18,536	13.74	700	876	894	2.05

Aquaculture

The volume of production from aquaculture grew by 5.72 percent during the 2nd quarter of 2003 from 333,986.8 metric tons in 2002 to 353,097.3 metric tons this year. The growth was attained from almost all types of aquafarm in all culture environments except from brackishwater fish cage and fish pens.

Seaweeds which contributed about 63 percent to the total aquaculture produce, registered an increase of 3.9 percent. More farmers in Palawan were encouraged to venture in seaweeds farming due to high price offered by local traders. On the other hand, the prevailing fair weather condition during the quarter allowed farmers in Antique to harvest more while some fishpond operators in Iloilo utilized their farms for seaweeds culture. The assistance of the local government units (LGUs) to the fisherfolk in Lanao del Norte inspired them to produce more. Moreover, these fisherfolk soaked their seedlings in complete (14-14-14) fertilizer before planting for greater produce. Newly opened areas were also observed in Misamis Occidental and Davao del Sur.

Fish/shell fishes which contributed 37 percent to the total aquaculture gained 8.93 percent during the quarter compared to same quarter of 2002. Most of the harvested fishes came from brackishwater fishponds and freshwater fishponds, fish pens and fish cages.

The increment from brackishwater fishponds was realized with the usage of quality fingerlings from a greater number of fishponds harvested in Central Luzon and Western Visayas. The super intensive stocking in brackishwater fishponds in Sarangani contributed to the production increase in SOCCSKSARGEN. The water level of fishponds in super intensive farming is deeper than other intensive farms. Majority of their produce were exported live to Japan. Some farms in the province were also back in operation after temporary suspension in previous year.

For freshwater fishponds, increased stocking density and the usage of Genetically Enhanced Tilapia (GET EXCEL) strain was noted in Central Luzon. The output gain from freshwater fishponds in CALABARZON was attained with the onset of harvest from ponds opened in the previous quarter in Laguna. Moreover, some rice paddies were used as fishponds during rainy season.

The rise in production from freshwater fish cages and pens was due to the usage of quality fingerlings and intensified feeding in Batangas and Laguna. The fish farmers in Rizal benefited from the non-closure of Napindan gridlock, enabling marine water from Manila Bay to flow freely in Laguna Lake and stimulating the growth of green algae which served as natural food for freshwater species.

Culture Environment/Type of Aquafarm	% Increase (Decrease)
Brackishwater Fishpond	3.70
Brackishwater Fish cage	(9.50)
Brackishwater Fish pen	(10.44)
Freshwater Fishpond	5.55
Freshwater Fish cage	9.36
Freshwater Fish pen	31.27
Marine Fish cage	112.59
Marine Fish pen	37.28
Oyster	27.85
Mussel	24.68
Seaweeds	3.90

Milkfish. Milkfish production during the second quarter grew by 12.14 percent over last year's level. The increase in production was observed in all culture environment except in brackishwater fish pens and cages.

The production increase by 3.78 percent from brackishwater fishpond was attributed to sufficient supply of quality fry/fingerlings that encouraged operators to increase their stocking density. Moreover, improved feeding practices as well as the favorable weather condition during the second quarter of 2003 resulted in better quality of harvest and low mortality.

The provinces that contributed to the increment in milkfish production were Bataan, Pampanga, Capiz, Iloilo and Aklan. On the other hand, production in Bulacan, Negros Occidental, Pangasinan and Quezon experienced a decrease. The drop in milkfish harvest was the result of the overflowing of ponds which washed out fry/fingerling stock at the height of Typhoon Chedeng. Likewise, reduction in utilization of farm inputs due to high cost paved the way for some areas to shift to tilapia culture.

A negative output of 10.96 percent and 9.95 percent was observed in brackishwater pens and cages, respectively. The reduced number of fish pens and cages in Pangasinan was a consequence of the implementation of a project on clearing of navigational lane in rivers in Dagupan City. Furthermore, some operators were hesitant to culture fish in pens and cages during summer for fear of fish kill. On the other hand, production of milkfish in Agusan del Norte increased by 2.42 percent due to initial harvest from newly installed cages.

Milkfish production from freshwater fish pen rose by 305.25 percent, contributed by Rizal and Sultan Kudarat provinces. The 270 percent output increase in Rizal was attributed to intrusion of marine and freshwater in the lake which stimulated the growth of natural food that enhanced growth of fishes. In Sultan Kudarat, some operators shifted their culture system from cages to pens to lessen the cost of production. On the contrary, production in Metro Manila dropped by 20 percent due to prevalence of "lasang gilik" forcing operators to harvest partially their stocks.

A production growth of 39 percent in marine pens and about 118 percent in fish cages was attained. Fisherfolk in Sual and Anda, Pangasinan were encouraged to venture in this culture due to favorable weather that allowed them to harvest in more areas. Similarly, good harvest from newly installed pens and cages was experienced in other provinces.

**TABLE 5. AQUACULTURE: MILKFISH PRODUCTION OF TOP PRODUCING PROVINCES
BY CULTURE ENVIRONMENT/TYPE OF AQUAFARM,
PHILIPPINES, APRIL - JUNE 2001 - 2003**

(METRIC TONS)

CULTURE ENVIRONMENT/ TYPE OF AQUAFARM/PROVINCE	2001	2002	2003	% CHANGE 03/02
PHILIPPINES	65,828.0	59,209.8	66,396.3	12.14
Brackishwater Fishpond	60,507.0	52,017.0	53,983.0	3.78
Bulacan	12,000.0	11,088.0	10,256.0	(7.50)
Negros Occidental	3,204.0	3,747.0	3,688.0	(1.57)
Bataan	1,254.0	2,004.0	2,141.0	6.84
Pampanga	3,065.0	3,246.0	3,538.0	9.00
Capiz	6,825.0	6,012.0	6,397.0	6.40
Iloilo	6,588.0	3,722.0	4,340.0	16.60
Pangasinan	5,996.0	4,655.0	4,422.0	(5.01)
Aklan	2,032.0	1,305.0	1,396.0	6.97
Quezon	4,348.0	4,005.0	3,908.0	(2.42)
Other Provinces	15,195.0	12,233.0	13,897.0	13.60
Brackishwater Fish pen	981.0	1,815.0	1,616.0	(10.96)
Pangasinan	978.0	1,812.0	1,613.0	(10.98)
Other Provinces	3.0	3.0	3.0	0.00
Brackishwater Fish cage	825.0	1,256.0	1,131.0	(9.95)
Pangasinan	618.0	1,050.0	924.0	(12.00)
Agusan del Norte	120.0	124.0	127.0	2.42
Other Provinces	87.0	82.0	80.0	(2.44)
Freshwater Fish pen	913.0	1,256.0	5,090.0	305.25
Rizal	294.0	986.0	3,646.0	269.78
Metro Manila	619.0	270.0	216.0	(20.00)
Sultan Kudarat			1,228.0	
Freshwater Fish cage	265.0	330.0	344.0	4.24
Sultan Kudarat	265.0	322.0	321.0	(0.31)
Other Provinces		8.0	23.0	
Marine Fish pen	1,393.0	1,645.2	2,291.4	39.28
Pangasinan	1,279.0	556.5	1,040.0	86.88
Other Provinces	114.0	1,088.7	1,251.4	14.94
Marine Fish cage	944.0	890.6	1,940.9	117.93
Pangasinan	826.0	426.0	1,070.0	151.17
Other Provinces	118.0	464.6	870.9	87.45

Tilapia. Tilapia production from all types of aquafarm posted an increase of 11.47 percent this quarter compared to same quarter of the previous year. Output from freshwater fish pens registered the highest growth of 231.14 percent while those from freshwater fishpond grew by 4.76 percent

The increment of 4.76 percent in freshwater fishpond from 23,640 metric tons in 2002 to 24,765 metric tons in 2003 was caused by the introduction and usage of Genetically Enhanced Tilapia (GET EXCEL) strain in Pampanga and Bulacan. Furthermore, the weather during the quarter was observed conducive to tilapia culture which encouraged farmers to expand their area. Harvest from newly opened fishponds in Nueva Ecija and Tarlac as well as the improved feeding practices of farmers in these provinces further boosted tilapia output. Moreover, the early rainfall experienced during the period favored the growth of tilapia. Similarly, the increment from other provinces was brought about by the continuous support extended by LGU and DA-BFAR which inspired some farmers to practice integrated farming. On the contrary, production decrease in Sultan Kudarat was the outcome of shifting to palay and corn by some operators due to low selling price of tilapia and high cost of feeds.

A 9.93 percent growth in tilapia harvest from freshwater fish cages was realized. Some fish cage operators in Laguna benefited from the quality fingerlings dispersed by BFAR and LGU thus, encouraging them to re-install their cages. Similarly, Batangas fisherfolk increased their operational cages and practiced intensive stock feeding to enhance their productivity. On the contrary, some provinces exhibited a downward trend due to the stunted growth of tilapia caused by dry spell and extreme hot water temperature. Also, some operators in Sultan Kudarat shifted to fish pen culture due to high production costs.

The production increment of 10.05 percent from brackishwater fishpond was brought about by the quality fingerlings dispersed by BFAR in Pampanga and the shift from mudcrab culture by operators in Bulacan. In addition, some idle areas in other provinces were utilized to avail of good market price.

The increment of 173.48 percent from freshwater fish pens in Rizal was brought about by the shifting of carp culture to tilapia and milkfish to meet consumers' preference on the said species. The clear water in Laguna Lake encouraged operators to increase the number of their pens and consequently increased their stocks. Some fish cage operators in Sultan Kudarat shifted to fish pen culture to reduce production cost.

**TABLE 6. AQUACULTURE: TILAPIA PRODUCTION OF TOP PRODUCING PROVINCES,
BY CULTURE ENVIRONMENT/TYPE OF AQUAFARM,
PHILIPPINES, APRIL - JUNE 2001 - 2003**

(METRIC TONS)

CULTURE ENVIRONMENT/ TYPE OF AQUAFARM/PROVINCE	2001	2002	2003	% CHANGE 03/02
PHILIPPINES	29,002.0	36,601.0	40,799.2	11.47
Brackishwater Fishpond*	2,393.0	2,717.0	2,990.0	10.05
Pampanga	1,050.0	1,042.0	1,097.0	5.28
Bulacan	200.0	250.0	292.0	16.80
Other Provinces	1,143.0	1,425.0	1,601.0	12.35
Freshwater Fishpond	17,827.0	23,640.0	24,765.1	4.76
Pampanga	11,513.0	18,656.0	18,948.0	1.57
Bulacan	2,400.0	1,560.0	2,047.0	31.22
Nueva Ecija	915.0	875.0	917.0	4.80
Tarlac	1,069.0	741.0	841.5	13.56
Pangasinan	354.0	211.0	218.0	3.32
Cagayan	254.0	226.0	214.0	(5.31)
Aurora	120.0	130.0	135.0	3.85
Ilocos Sur	143.0	135.0	131.0	(2.96)
Sultan Kudarat	150.0	169.0	118.0	(30.18)
Other Provinces	909.0	937.0	1,195.6	27.60
Freshwater Fish cage	8,024.0	9,438.0	10,375.1	9.93
Batangas	3,112.0	3,922.0	4,485.0	14.35
Laguna	1,995.0	2,305.0	2,684.0	16.44
Camarines Sur	1,000.0	956.0	952.0	(0.42)
Albay	640.0	538.0	497.0	(7.62)
South Cotabato	266.0	422.0	406.0	(3.79)
Isabela	248.0	366.0	375.0	2.46
Sultan Kudarat	245.0	400.0	373.0	(6.75)
Ifugao	238.0	202.0	172.0	(14.85)
Quezon	143.0	180.0	169.0	(6.11)
Other Provinces	137.0	147.0	262.1	78.30
Freshwater Fish pen	758.0	806.0	2,669.0	231.14
Rizal	651.0	690.0	1,887.0	173.48
Sultan Kudarat			630.0	
Laguna	94.0	113.0	149.0	31.86
Other Provinces	13.0	3.0	3.0	-

* Includes tilapia production from brackishwater fish pen and cage.

Tiger prawn. The production of tiger prawn this quarter registered an increase of 2.82 percent against same quarter of last year. The increment of 7.34 percent in Pampanga was attributed to the good quality of post larvae and good water condition. On the other hand, the increase in area, good maintenance and intensive feeding in Zamboanga Sibugay, Zamboanga del Sur and Bohol paved the way for operators to produce more. Other reasons that enhanced the production of prawn were the technical assistance extended by the LGU, lesser mortality rate, early harvest, demand for export and the resumed operation of some temporarily closed ponds.

Mud crab. The overall production of mud crab in second quarter of 2002 declined from 1,138 metric tons to 1,110.4 metric tons in 2003. The decrease by about two (2) percent of mud crab produce was attributed to insufficient supply of crablets that resulted in either temporary stoppage of some farms in brackishwater environment or reduction of their stocks. Furthermore, some operators shifted to tilapia farming. Meanwhile, the increase in mud crab produce from marine fish cages in Eastern Samar was realized due to harvest from newly installed ones.

Carp. Total carp production declined by 63.08 percent compared to the same quarter of last year. The drop in production by about 65 percent from freshwater fish pens and cages in Rizal was attributed to the shifting from carp culture to bangus and tilapia due to consumers' preference for these species. Meanwhile, operators from other provinces experienced non-availability of fingerlings, prompting them to temporarily stop their operation.

On the contrary, the output from freshwater fishpond grew by 64.86 percent due to high market demand in Lanao del Norte. The availment of quality fingerlings from BFAR-LGU and QUEDANCOR encouraged some farmers to install new cages.

Catfish. Catfish posted production increase of 68.63 percent this quarter over the same quarter of last year. The upsurge in production in Davao City, Nueva Ecija and Bulacan was brought about by the harvest from newly opened and rehabilitated fishponds. Fisherfolk from these provinces were encouraged to culture catfish due to demand from fastfood and restaurants. Moreover, the operators availed of good fingerlings and have improved their management practices. The lack of rainfall during the second quarter forced fishpond operators in Isabela to harvest their stocks at a premature stage. Furthermore, production growth of 106 percent in other provinces was a result of the technical assistance extended by the Department of Agriculture whereby farmers were inspired to venture in catfish culture.

TABLE 7. AQUACULTURE: TIGER PRAWN, MUD CRAB, CARP AND CATFISH PRODUCTION

PHILIPPINES, APRIL - JUNE 2001-2003

(METRIC TONS)

SPECIES/CULTURE ENVIRONMENT/ TYPE OF AQUAFARM/PROVINCE	2001	2002	2003	% CHANGE 03/02
TIGER PRAWN				
Brackishwater Fispond*	11,811.0	8,055.0	8,282.0	2.82
Pampanga	6,400.0	3,338.0	3,583.0	7.34
Sibugay		1,000.0	1,014.0	1.40
Zamboanga del Sur	1,602.0	858.0	883.0	2.91
Bohol	377.0	303.0	344.0	13.53
Other Provinces	3,432.0	2,556.0	2,458.0	(3.83)
Marine Pen/Cage			0.4	
MUD CRAB	739.0	1,138.0	1,110.4	(2.43)
Brackishwater Fispond	736.0	1,132.0	1,102.0	(2.65)
Pampanga	480.0	750.0	778.0	3.73
Misamis Occidental	45.0	50.0	50.0	0.00
Camarines Sur	31.0	36.0	39.0	8.33
Sorsogon	31.0	39.0	34.0	(12.82)
Other Provinces	149.0	257.0	201.0	(21.79)
Marine Fish pen/Cage	3.0	6.0	8.4	40.00
Zamboanga del Sur	3.0	6.0	6.1	1.67
Eastern Samar			2.2	
Other Provinces			0.1	
CARP	5,114.0	5,417.0	1,999.7	(63.08)
Freshwater Fishpond	50.0	35.0	57.7	64.86
Lanao del Norte	30.0	35.0	45.0	28.57
Other Provinces	20.0		12.7	
Freshwater Fish pen/Cage	5,064.0	5,382.0	1,942.0	(63.92)
Rizal	5,061.0	5,366.0	1,867.0	(65.21)
Laguna			67.0	
Other Provinces	3.0	16.0	8.0	(50.00)
CATFISH	211.0	314.0	529.5	68.63
Freshwater Fishpond	211.0	314.0	529.5	68.63
Bulacan	60.0	112.0	157.0	40.18
Davao City	6.0	19.0	100.4	428.42
Isabela	61.0	70.0	73.3	4.71
Nueva Ecija	30.0	21.0	43.0	104.76
Sultan Kudarat	19.0	32.0	32.0	0.00
Other Provinces	35.0	60.0	123.8	106.33

*Include data from brackishwater fishpen

Seaweeds. Seaweeds production this quarter was up by 3.90 percent from 213,138 metric tons in 2002 to 221,452 metric tons in 2003. The provinces with sizeable marks up in production were Zamboanga del Norte, 45.26 percent; Antique, 40.17 percent and Palawan, 27.78 percent. The growth in production from these provinces was the result of enhancement program and technical assistance from BFAR, LGU and NGO as well as the financial support from local traders. Likewise, the production increment by about 13 percent in Zamboanga del Sur and 6.48 percent in Bohol was attributed to good quality produce on account of proper propagation and culture method, fewer occurrences of pests and diseases. These factors encouraged farmers to plant more and increase their harvest area.

On the contrary, production in Zamboanga City dropped by 32.78 percent due to high production cost which inhibited farmers from seaweeds culture. Tawi-Tawi and Sulu also suffered output shortfall due to ice-ice disease as an effect of prolonged dry season. Some seaweed farms in Quezon were washed out by typhoon Chedeng thereby, reducing the output in the province by 4.78 percent.

Oyster. Production of oyster during the quarter grew by 27.85 percent compared to same quarter last year. Bulacan and Iloilo registered the biggest upswing of 77.06 percent and 68.75 percent, respectively. Similarly, Capiz and other provinces boosted their produce by 6.55 percent and 16.98 percent, respectively. The positive growth in oyster production was accounted to less water pollution that resulted in more propagation of spats. Some farmers maximized their areas through hanging and spreading methods, giving them higher yield. Meanwhile, production decline in Pangasinan was due to flood brought about by typhoon Chedeng and the implementation of a municipal ordinance in Negros Occidental on river clearing. Some oyster beds in the province were demolished as an effect of this ordinance.

Mussel. The second quarter production of mussel rose by 24.68 percent compared same quarter of last year. Expansion in areas for mussel culture by farmers in Cavite was done for pens and cages. Moreover, the good water quality allowed the growth of more spats. This enabled the fisherfolk to produce 52.73 percent more than last year's output. Similarly, mussel farmers in Aklan and other provinces were encouraged to produce more due to fair weather condition that favored the growth of mussel. High demand for this shellfishes was also noted during the Lenten season. On the other hand, Negros Occidental lessen their production by 9.09 percent due to the implementation of a municipal ordinance on river clearing. Some farms that were 15 meters beyond the shorelines were demolished.

**TABLE 8. AQUACULTURE: MARICULTURE PRODUCTION BY SPECIES,
BY PROVINCE, PHILIPPINES, APRIL - JUNE 2001 - 2003**

(METRIC TONS)

SPECIES/PROVINCE	2001	2002	2003	% CHANGE 03/02
SEAWEEDS	201,721.0	213,138.0	221,452.1	3.90
Tawi tawi	39,845.0	49,053.0	43,160.0	(12.01)
Sulu	46,505.0	34,729.0	33,295.0	(4.13)
Palawan	21,120.0	22,297.0	28,492.0	27.78
Bohol	20,023.0	19,268.0	20,517.0	6.48
Zamboanga Norte	9,694.0	12,604.0	18,309.0	45.26
Antique	7,768.0	11,984.0	16,798.0	40.17
Quezon	9,250.0	14,743.0	14,038.0	(4.78)
Zamboanga Sur	5,399.0	10,362.0	11,708.0	12.99
Zamboanga City	19,368.0	11,989.0	8,059.0	(32.78)
Other Provinces	22,749.0	26,109.0	27,076.1	3.70
OYSTER	10,648.0	5,547.0	7,091.9	27.85
Bulacan	5,350.0	2,000.0	3,375.0	68.75
Pangasinan	1,816.0	1,400.0	1,232.0	(12.00)
Capiz	836.0	1,008.0	1,074.0	6.55
Iloilo	181.0	279.0	494.0	77.06
Negros Occidental	454.0	366.0	339.0	(7.38)
Other Provinces	2,011.0	494.0	577.9	16.98
MUSSEL	6,358.0	3,789.0	4,724.2	24.68
Cavite	3,820.0	1,375.0	2,100.0	52.73
Capiz	1,746.0	1,608.0	1,668.0	3.73
Western Samar	330.0	300.0	320.0	6.67
Aklan	170.0	192.0	225.0	17.19
Negros Occidental	180.0	220.0	200.0	(9.09)
Other Provinces	112.0	94.0	211.2	124.68

WHOLESALE FISH PRICES

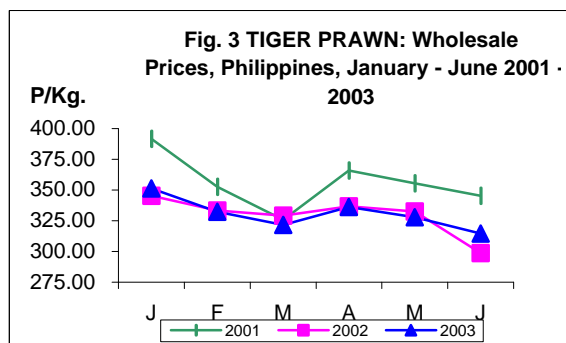
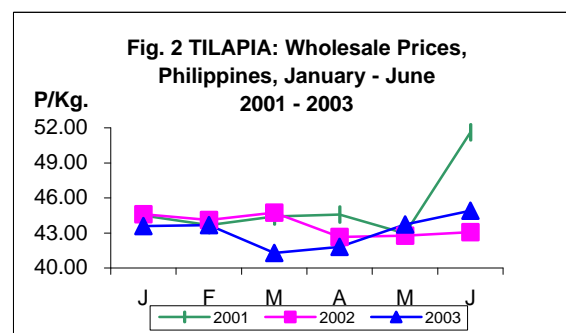
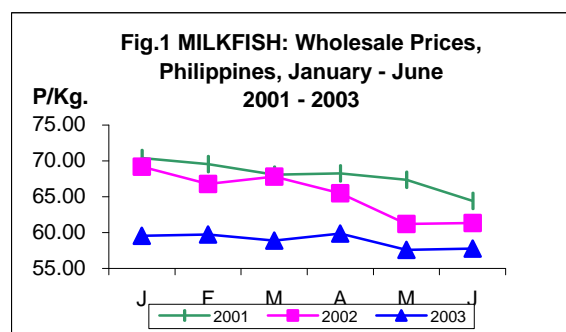
Monthly wholesale prices of milkfish continually declined with smaller decrements that ranged from 5.84 percent to 8.57 percent from April to June 2003. Average price for the first semester of 2003 was down by 9.81 percent at P58.90 per kilo from P65.30 per kilo of the same period last year.

Tilapia price decrements were observed until April this year. However, monthly quotations went up in May and June by 2.22 percent and 4.25 percent, respectively. Nevertheless, average price this year declined by 1.13 percent at P43.17 per kilo from P43.66 per kilo last year.

Average price of tiger prawn, on the other hand, was slightly higher this year by 0.45 percent at P330.69 per kilo as compared to previous year's price of P329.21 per kilo. Although monthly wholesale price was down until May 2003, an increment of 5.32 percent was noted in June 2002 at P314.55 per kilo from P298.66 per kilo in 2003.

TABLE 9. WHOLESALE PRICES OF MILKFISH, TILAPIA AND TIGER PRAWN, PHILIPPINES, JANUARY - JUNE 2001 - 2003

SPECIES/MONTH	WHOLESALE PRICE (P/KG)			% CHANGE (03/02)
	2001	2002	2003	
MILKFISH				
January	70.40	69.19	59.56	(13.92)
February	69.57	66.78	59.71	(10.59)
March	68.08	67.81	58.89	(13.15)
April	68.27	65.47	59.86	(8.57)
May	67.36	61.21	57.59	(5.91)
June	64.42	61.34	57.76	(5.84)
Average Price	68.02	65.30	58.90	(9.81)
TILAPIA				
January	44.50	44.59	43.60	(2.22)
February	43.67	44.12	43.68	(1.00)
March	44.42	44.75	41.28	(7.75)
April	44.57	42.67	41.82	(1.99)
May	42.96	42.77	43.72	2.22
June	51.63	43.08	44.91	4.25
Average Price	45.29	43.66	43.17	(1.13)
TIGER PRAWN				
January	391.71	345.19	351.41	1.80
February	352.62	333.22	332.41	(0.24)
March	325.67	329.04	321.65	(2.25)
April	365.85	336.67	336.21	(0.14)
May	355.59	332.50	327.89	(1.39)
June	345.40	298.66	314.55	5.32
Average Price	356.14	329.21	330.69	0.45



Roundscad wholesale price increased significantly in May this year by 16.62 percent at P42.94 from P36.82 per kilo in the previous year. Average price was computed at P42.40 per kilo, about 2.58 percent higher than 2002's P41.33 per kilo.

Wholesale price quotations of frigate tuna in May and June 2003 showed small increments of 3.03 percent and 7.95 percent, respectively. However, another big decline of 13.65 percent was seen in April price this year, at P37.96 as against P43.96 per kilo in April 2002. Thus, average price remained negative at P44.36 per kilo compared to P45.71 in 2002.

Although there was a 3.71 percent increase in May 2003, price of indian mackerel in April and June quoted negative change of 1.65 and 1.96 percent, respectively. Average price for the first six months of 2003 registered a minimal decrease of 0.54 percent, at P61.14 per kilo from P61.47 in 2002.

TABLE 10. WHOLESALE PRICES OF ROUNDSCAD, FRIGATE TUNA AND INDIAN MACKEREL, PHILIPPINES, JANUARY - JUNE 2001 - 2003

SPECIES/MONTH	WHOLESALE PRICE (P/KG)			% CHANGE (03/02)
	2001	2002	2003	
ROUNDSCAD				
January	46.25	47.82	47.22	(1.25)
February	44.79	43.00	45.52	5.86
March	43.32	40.96	38.83	(5.20)
April	43.47	38.71	38.24	(1.21)
May	42.18	36.82	42.94	16.62
June	42.68	40.69	41.66	2.38
Average Price	43.78	41.33	42.40	2.58
FRIGATE TUNA				
January	47.83	53.52	52.04	(2.77)
February	47.93	42.68	45.00	5.44
March	46.73	46.83	39.12	(16.46)
April	50.17	43.96	37.96	(13.65)
May	47.65	43.23	44.54	3.03
June	43.97	44.02	47.52	7.95
Average Price	47.38	45.71	44.36	(2.94)
INDIAN MACKEREL				
January	61.98	65.73	66.23	0.76
February	58.68	64.16	64.28	0.19
March	56.06	62.27	59.69	(4.14)
April	57.86	59.51	58.53	(1.65)
May	57.66	57.47	59.60	3.71
June	58.22	59.66	58.49	(1.96)
Average Price	58.41	61.47	61.14	(0.54)

