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THE OCEANS AND FISHERIES PARTNERSHIP

SITE PROFILE: GENERAL SANTOS CITY, PHILIPPINES

OVERVIEW

The USAID Oceans and Fisheries Partnership (USAID Oceans) works to strengthen regional cooperation to combat illegal, unreported, and unregulated (IUU) fishing, promote sustainable fisheries, and conserve marine biodiversity in the Asia-Pacific region. The partnership seeks to achieve these objectives through the development of a Catch Documentation and Traceability System (CDTS) that supports enhanced traceability, fisheries management, and human welfare. Working across ASEAN and Coral Triangle member countries, USAID Oceans has established two learning sites—General Santos City, Philippines and Bitung, Indonesia. These sites will support the development, implementation, and testing of the CDTS and will serve as a hub for regional knowledge sharing for replication and expansion.

General Santos City: The Tuna Capital of the Philippines. The Philippines is located along the “tuna highway,” which runs through the Indian Ocean down to the Western and Central Pacific Ocean. It is located in the Sulu-Sulawesi Marine Ecoregion (SSME), with waters so globally significant that during the past two decades they have become a high priority for global conservation and sustainable development efforts. General Santos City is strategically located near the tuna-rich fishing grounds of the Sulu Sea, Moro Gulf, and the Mindanao and Celebes Seas. The country is currently ranked as the second largest manufacturer of canned and processed tuna in Asia, after Thailand, with a majority of this catch landed in the port of General Santos City. The fisheries sector holds tremendous significance to national and local economies. As such, fisheries management is crucial to protecting the region’s biodiversity and sustaining the viability of fisheries and marine ecosystems. The strategic location of the city makes it an important area for a demonstration of a sustainable tuna fisheries management plan and a tremendous opportunity for traceability and value chain analysis studies.



BIODIVERSITY



Learning site ecosystem. General Santos’ marine and coastal habitats are composed of the marine waters, mangroves, seagrass and coral reefs where commercial fisheries and municipal fisheries almost equally share volume of catch in capture fisheries. It has rich and diverse fishery resources with over 400 commercially important species.

Over 200 species are reef-associated, 52% of the catch in the Sarangani Bay area, and represented mainly by groupers (Serranidae) and snappers (Lutjanidae); 108 are pelagic species (28% of catch) including jacks (Carangidae), herrings (Clupeidae), mackerels and tunas (Scombridae).

Some species are restricted to one habitat while others move around to search for food or habitats that favor certain stages of their life cycle (nursery, feeding, spawning). The Sarangani Bay serves as a major spawning ground for a majority of commercially viable fish species, warranting its status as a special protected seascape management area. The Bay's protected status is intended to ensure fish stocks for a viable population that can support future generations and maintain species diversity. The Sarangani Bay Protected Seascape under Presidential Proclamation 756 covers an area of 216,000 hectares (2,160 m²).



Priority biodiversity threats. Threats to biodiversity include unregulated fishing such as unrestricted fishing in all areas, unregistered fishing boats, continued use of illegal gears and unsustainable fishing practices. A lack of data and research to assess current fish stocks, as well as the absence of sufficient monitoring, control, and surveillance mechanisms may lead to the proliferation of unsustainable fishing practices that consequently threaten Sarangani Bay biodiversity.

SITUATIONAL ANALYSIS

Economic Profile



Annual Landings. Tuna comprise the majority of fish landed at General Santos City port, with nearly 89% of the 1,012,488 metric tons of total landed fish recorded from 2008 to 2014 in General Santos City noted as tuna or a tuna-like species. 200,000 tons of tuna were landed in General Santos City in 2014, and rising sharply each year.

The increase in tuna landings in General Santos City is largely due to a more than 50% increase in imported frozen tuna—from over 48,450 metric tons (47% of landings) during the first half of 2014 to nearly 73,000 metric tons (63% of landings) over the same period in 2015 (PFDA, 2015).



Tuna are landed at the General Santos City Fish Port, which receives catch from over 25 vessels each day.

Proportion of Fish Landed. Approximately 45% of tuna catch and landed in General Santos City are skipjack, 25% are yellowfin and 23% are frigate and bullet tuna. Mackerel, scad, flyingfish, and parrotfish are also landed, but in volumes much less significant than those of tuna species.

In 2014, about 47% of the total fish landed in General Santos City were frozen tuna, of which more than 70% of which came from foreign vessels. 2014 marked the highest fresh landings at approximately 101,480 metric tons, a 12-year record high.

Export Data. Of the catch landed at General Santos City, approximately 60% of catch caught by ring net landing goes to local processing plants, the majority of which are canneries. Approximately 35% is shipped out of General Santos City and the remaining 5% is locally consumed. In terms of volume, the Philippines is a top three tuna producer in the world. 80% of Philippines seafood is exported to the US and the EU, with a value of approximately US \$120 million export earnings per year.

Supply Chain Overview

Vessel Types. Commercial tuna fleets are typically comprised of deep sea purse seine and ring net vessels. Purse seine boats range from 100 to 500 gross tons, with an average of about 250 gross tons. Municipal tuna fisheries, operating on a smaller scale, use handline and longline fishing methods, catching adult tuna from 110 to 150 centimeters (Aprieto, 1995). General Santos City Fish Port receives an average of 25 boats daily, ranging from large to medium in scale, and landing fish caught from as far as borderline of Indonesia and Palau Islands.



Small-scale fishing boats line the beach in a small fishing village.

Fisherfolk and Fishing Methods. The majority of households in General Santos' coastal zone are engaged in fishery-related activities, active in at least one tier of the supply chain. About 70-90 percent of these households depend on fishing for their livelihood. The most common fishing gear types used in the area are hook and line, multiple hand line, long line, troll line, ring net, beach seine, drift gill net, fish corral, fish pots and spear. Small-scale fishermen typically travel two to three hours out from shore on small motorized or non-motorized boats to reach their fishing ground. Fishing time varies, dependent on the type of fishing gear used, but on average is approximately seven hours per day.

Medium and large-scale commercial operations are prevalent in General Santos, and are comprised of tuna purse seine and longline fishing vessels. The commercial tuna fleet range from 100 to 500 gross tons, with an average of about 250 gross tons. The most common fishing gear types used in the area are hook and line, multiple hand line, long line, troll line, ring net, beach seine, drift gill net, fish corral, fish pots, and spear.

Processing Operations. In General Santos City, fish and fishery products are processed both on large and small scales. Large-scale processing includes canned, fresh frozen, and fresh chilled tuna, and is distributed to both domestic and export markets. Smaller

scale processing, as performed in coastal communities, typically involves salting, drying, and fermenting for local and domestic consumption.



Tuna are weighed, classified, and logged each morning at the General Santos City Fish Port Complex.

Priority Challenges

Overfishing and Dwindling Fish Catch. There is a growing recognition of decreased fish stocks around the world—a problem experienced also in the Sarangani Bay. Recent years have shown a drop in tuna production in the Philippines and decreased availability of other local fish species. Overfishing is compounded by environmental concerns, such as climate change. Environmental changes, such as prolonged dry seasons, greatly affect fishing grounds and marine habitats.

Human Welfare. Human welfare concerns are present both on large and small scales, from large-scale commercial operations to small-scale impacts that are felt in local villages and fisheries communities. Human welfare challenges faced in General Santos include low job security, lack of access to benefits, and familial impact that result from increasingly long trips at sea that result from fishing occurring further and further from the coast as fish stocks decline. Many workers, particularly in processing, are employed as contractual workers with short term employment and without benefits. Ensuring a safe and transparent labor chain is central to human welfare priorities in the Philippine learning site.

Regulatory and Institutional Frameworks. Many issues (e.g., the proliferation of IUU fishing and poor traceability) confronting the tuna industry have been attributed to the complexity of law enforcement, inconsistent policies, and the overlapping mandates

of concerned government agencies. The Philippines has instituted various laws and policies to protect, conserve, and manage fisheries resources, but there is a regional need to better understand the value supply chain and adopt a holistic approach to addressing IUU impacts.

OPPORTUNITIES

General Santos City sits, geographically and economically, at a juncture that represents tremendous opportunity to reduce IUU fishing practices and protect a regionally-critical marine ecosystem through catch documentation and traceability. As one of two USAID Oceans learning sites, the U.S. Agency for International Development, the Southeast Asia Fisheries Development Center (SEAFDEC), and the Philippine Bureau of Fisheries and Aquatic Resources, Region 12, will work together to:

- **Better understand supply chain value chains.** A value chain assessment will identify the main export markets and articulate a catch documentation and traceability's cost, benefits, and return on equity.
- **Enhance fisheries management through an Ecosystem Approach to Fisheries Management.** An in-depth analyses will support EAFM plan development that links with broader Sulu-Sulawesi Sea Regional Frameworks.
- **Address human welfare concerns to support policy development and intervention.** Human welfare scoping will enable USAID Oceans to better understand human welfare issues, including instances of gender inequality and labor rights abuses in the fisheries sector.
- **Develop strategic partnerships that support CDT system implementation.** Engagement with the private sector will secure their strong support, thus ensuring a mutually beneficial and financially sustainable CDT system.
- **Implement and test the Catch Documentation and Traceability System** in the General Santos City Fish Port Complex, including use by both small and large-scale fishers.

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