

Compilation of Data on Processed Fishery Products

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Introduction

For several years now, the Bureau of Agricultural Statistics (BAS) has been catering to data requests on fishery statistics from international organizations such as the Food and Agriculture Organization (FAO). In such requests, the primary information required are fish catch production and value. In the case of Aquaculture, the hectareage utilized in the culture of different fish species, shells and seaweed is likewise requested. The Bureau did not have any difficulty in complying with their requests as the data items needed are included in the regular surveys being conducted nationwide.

In June last year, however, our host/organizer of this workshop the Marine Fisheries Research Department (MFRD), sent a questionnaire on processed fishery products categorized as frozen, dried, smoked, salted and canned. I suppose that the same set of questionnaires have been sent to the different countries for the purpose of compiling data on processed fishery products. Since the data requested are not being generated by the Bureau, our staff had to go to the different agencies and learning institutions to research.

This paper will present our experience in the compilation of processed fishery products. In particular, it will discuss the following :

- The BAS and its Mandate
- The MFRD Questionnaire on Processed Fishery Products
- Other Agencies Involved in Processed Fishery Products
- Learning and Research Institutions
- Problems Encountered in the Compilation
- Recommendations

The BAS and its Mandate

Under Executive Order No. 116 dated January 30, 1967, the BAS is responsible for the collection, compilation and official release of agricultural statistics. It exercises technical supervision over data collection centers and coordinates research activities pertaining to agricultural statistics of bureau, corporations and offices under the Department of Agriculture.

In carrying out its mandate, the bureau has three (3) technical divisions, two (2) support divisions, five (5) survey operations coordinating offices and provincial operation centers (POC) in all provinces of the country. The POCs undertakes the collection, monitoring and dissemination of agricultural statistics in the field in coordination with the technical divisions and survey operations coordinating offices at the Central Office.

At the Fishery Section of the BAS, regular activities include the conduct of every-other-day surveys of Commercial and Municipal fish catch unloaded at sample landing centers in 65 provinces and cities and semestral survey of aquaculture production in sample aquafarms in 77 provinces and cities.

For Commercial and Municipal surveys, the most important information obtained is the volume of fish catch production segregated by fishing ground, fishing gear and species. Other important data generated are price/kg and fishing effort. For aquaculture, the information on farm practices, stocking and farm inputs are likewise obtained. The Bureau's current fishery statistics, therefore, do not include information on processed fishery products.

However, recent developments in government priority programs recognize the importance of processed fishery products especially frozen and canned products because of their sizable contribution to the country's economy. Last year, President Fidel V. Ramos launched the 1993-1996 Medium Term Fisheries Management and Development Program in consonance with the government's continued effort to enhance the productivity of the country's fishery resources.

A major component of this project is the "Gintong-Ani for Fisheries" which is directed towards the development of aquaculture, management of lakes and the provisions of infrastructure and post-harvest facilities. The action plan on post-harvest facilities includes the establishment or improvement of ice plant and cold storage facilities in traditional fishing villages to attract private investors. The government also plans to expand post-harvest services and establish quality standards to ensure product acceptability in the world market.

With the vision of the government towards Philippines 2000, the need for a well

established database on processed fishery products cannot be ignored.

The MFRD Questionnaire on Processed Fishery Products

The MFRD questionnaire categorized the different processed fishery products into frozen, dried, smoked, salted and canned. In each category, the following data items are included :

- Local Name (of product)
- Cost of Final Material
- Cost of Raw Material
- Description of Product
- References in Literature
- Main Materials
- Sub-Ingredients
- Processing Method
- Machine Used
- Packaging Conditions
- Storage Conditions
- Shelf Life
- Ways of Consumption
- Production Volume 1988 - 1993
- Export Volume 1988 - 1993
- Countries for Export
- Problems in Marketing and Quality Control

Other Agencies Involved in Processed Fishery Products

It was difficult to accomplish the MFRD questionnaire because the needed data are not covered by the generally accepted mandate of BAS. Our staff had to go to the different research institutions and government agencies to satisfy with the request.

1. National Statistics Office (NSO)

The NSO is the major agency mandated to generate general-purpose statistics. It is responsible for undertaking censuses and surveys of demographic and socio-economic aspects of national development such as population, health and education. It also undertakes censuses of agricultural holdings and establishments in coordination with the BAS.

The NSO has also field offices which take charge of the implementation and administration of the statistical programs and in the dissemination of statistics at the local level.

As for information on processed fishery products, the NSO provided the data on volume of export from 1988-1993 as well as the countries of destinations.

2. Bureau of Fishery and Aquatic Resources

(BFAR)

The Bureau of Fishery and Aquatic Resources is responsible for the proper management and utilization of the country's fishery and aquatic resources. It also undertakes studies on the economics of the various phases of the fishing industry and provides technical assistance and advisory services.

The volume of production of processed fishery products for the whole country is not available. BFAR has an updated list of fish processing plant for 1995 but it identifies only a total of 176 fish processors. Small-scale fish processors are obviously not included in this listing.

3. Philippines Council for Agriculture and Resources Research and Development (PCARRD)

The Philippines Council for Agriculture and Resources Research and Development is one of the 19 councils under the Department of Science and Technology serving the National Research System. It publishes the Technology Series to highlight current advances in agriculture and natural resources for policy makers and research administrators. Among the published series which proved to be useful in the compilation are the following:

- Improved Icing of Milkfish
- Canning of Smoked Milkfish
- Cabinet-type Dehydrator for Drying

These publications were the primary sources of information in accomplishing the MFRD questionnaires, such as description of the processed fishery products, main materials and sub-ingredients used, the processing method, machines used, packaging and storage conditions, shelf life and problems in marketing and quality control.

Learning & Research Institutions

For these past years, people from the academic and government agencies have been actively involved in research studies for the improvement of fish processing methods and techniques, including cost and returns analysis. They also conduct verification projects to evaluate the efficiency of the developed methods.

Among the government agencies and learning institutions which contributed greatly to the advancement in the processing methods of fishery products are the following :

- Industrial Technology Development Institute,

- Department of Science and Technology
- Bureau of Fisheries and Aquatic Resources
 - Research Information Utilization Division, Philippine Council for Aquatic and Marine Research and Development (PCMARD)
 - Food Terminal, Incorporated (FTI)
 - National Institute of Science and Technology (NIST)
 - College of Fisheries, University of the Philippines, Dillman, Quezon City
 - University of the Philippines at Los Banos (UPLB)
 - University of the Philippines in the Visayas (UP Visayas)
 - Philippines Women's University (PWU)

Problems Encountered In The Compilation

As mentioned earlier, it was difficult for us to complete the MFRD questionnaires on processed fishery products primarily because of the following problems :

- Lack of a cohesive baseline information on processed fishery products. Baseline information is not complete. For instance, we really do not have an idea of the number of fish processors, including medium to small-scale processors and their volume of production.
- Lack of a centralized sources of information regarding the fish processing industry in the country. There is no single agency which is responsible, at least, for the dissemination of information pertaining to the country's fish processors and their processing activities. The researchers had to go from one agency to the next in gathering data on processed fishery products.

Recommendations

The fish processing industry is, no doubt, a thriving industry in the Philippines. Aside from local demand, the country has been exporting processed fishery products to different countries all over the world. However, its full potential in the world market has not been fully tapped because of problems besetting the industry.

The government is cognizant of these problems. It has already responded by formulating the action plan through the "Gintong Ani Program". With the absence, however, of cohesive baseline information on processed fishery products and a centralized source of information, implementation of the plan may not be as effective and efficient.

The Bureau of Agriculture Statistics, with

its expertise and manpower, can very well function as the coordinating agency on matters pertaining to processed fishery product. The various agencies and learning institutions involved in research or improvement of fish processing methods and technologists can submit the results and findings of their studies to BAS for comparison and dissemination to policy makers, researchers, investors, foreign agencies such as the MFRD, students and other users of data on processed fishery products.

With appropriate funding, the Bureau can initially conduct a census of fish processors nationwide to generate the baseline information, to be followed by quarterly survey to monitor the production level of processed fishery products.

Conclusion

I have been telling you how difficult it was for us to accomplish the MFRD questionnaires on processed fishery products. Difficult as it was, we could not help but thank MFRD in giving us the opportunity to be of help in its endeavour to compile data on processed fishery products.

The experience has widened our vision on how the Bureau of Agriculture Statistics could better serve its clients especially the users of statistics on processed fishery products.

On behalf of the BAS, I would like to extend our sincere thanks and appreciation to MFRD for giving us the opportunity to be part of this important event.