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seafood in Lingayen Gulf, Philippines

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專 攻 Major	Applied Marine Environmental Studies	氏 名 Name	Milan Shielameh Peralta
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Abstract

Small-scale fisheries are vital to coastal communities, providing significant contributions to food security, livelihood, and nutrition. Globally, most people engaged in capture fisheries are considered small-scale fishers, and fisheries landings are largely intended for local human consumption. Small-scale fishers particularly in developing countries earn extremely low income from fishing. In the Philippines, small-scale fishers remain at the poverty threshold and are the poorest among the basic sectors of the society mainly because of declining catch, few alternative livelihood opportunities, and deficiencies in market access. Small-scale fishers were observed to be receiving the least economic benefits for their products among other market players. Such findings are revealed through market system research and value chain analysis. Knowledge on market systems is essential for market development initiatives to improve the socio-economic conditions of small-scale fishers. However, little attention has been given in understanding the dynamics of market systems and value chains, with most studies often concentrating on the ecological aspect of the production system. Furthermore, conducting market studies on reef fisheries is challenging because of its complexity and multispecies nature; thus, a comprehensive analysis is rather difficult to pursue. This thesis was conducted to examine the current market system of reef-associated seafood and gain insights which may help contribute to the enhancement of socio-economic conditions of fishers and the sustainability of fisheries resources.

The study was conducted in four coastal areas in Lingayen Gulf, northwestern Philippines, namely, the municipalities of Anda and Bolinao and city of Alaminos in the province of Pangasinan and the city of San Fernando in the province of La Union. A purposive sampling approach was applied in the selection of the study sites (barangays or villages), which include three barangays each in Anda, Bolinao, and San Fernando and four barangays in Alaminos. The local government units, through the City or Municipal Agriculture Officers, were requested to suggest sites based on the estimated number of registered fishers, presence of coral reefs, presence of landing sites or fishing ports, and proximity to public markets and tourist attractions. Data were collected from November–December 2017 and April–May 2018.

In the first study, the market flow, marketing practices, and market players involved in the

marketing of reef-associated seafood were identified using the descriptive approach of market analysis. Primary data were collected from key respondents through interviews using standardized semi-structured questionnaires. Result showed that the current marketing of reef-associated seafood in Lingayen Gulf involves multi-level local market players. The three primary market agents are local traders (*kumprador*), ambulant vendors (*kadaw*), and market vendors (*tindera*) and are mostly dominated by women. Various secondary market agent categories, including hotels and restaurants were also identified. Fishers mostly prefer landing their daily catches in their own houses or at traders' houses mainly for convenience reasons. Reef-associated seafood, mainly those of good quality are largely marketed while small portion are for home consumption. The interdependence between fishers and local traders is manifested through the *suki* (patron–client relationship) system. The role of local traders is recognized by fishers not only for funding fishing expenses but especially during financial emergency situations.

The second study was conducted to determine the availability of and current consumer preferences for reef-associated seafood. Given the integral role of fish and invertebrates in the coral reef ecosystems and their importance as sources of income for coastal communities, maintaining a balance between ecological and economic benefits is essential. The study aimed to provide a baseline data on the currently available reef-associated seafood that are marketed. A survey was conducted using questionnaires to obtain data on the composition, quantities, and prices of reef-associated seafood from key respondents. Result showed that fishers' catches are composed of a variety of reef-associated seafood from different functional groups. A large portion are marketed to local consumers and there is also a potential market from the tourism sector. Among the major fish and invertebrates, groupers were consistently high-valued, followed by rabbitfishes, blue swimming crabs, and parrotfishes. Among the major fish, grouper and rabbitfish (*malaga*) command the highest price when sold directly to tourists. Prices are even higher when seafood, after value adding, are sold by hotels and restaurants. As the demand for reef-associated seafood continue to grow both for local and tourism market, the supply is declining, and considerable quantities of catch traded were observed to be undersized and thus priced low.

In the third study, the current problems and opportunities in marketing reef-associated seafood were identified using a combination of survey interviews, focused group discussions, and field observations. Currently, the marketing of reef-associated seafood is confronted with environmental (man-made and natural), socio-economic and governance-related problems. Some of the opportunities identified include the presence of tourists, availability and proximity to functional public markets, auxiliary services and the existence of *suki* system. The presence of tourists in Lingayen Gulf and their interest in fresh seafood is considered an opportunity to obtain higher profits. Additionally, the

functional and accessible public markets are highly useful in marketing reef-associated seafood. Auxiliary services play a role in marketing and are potential sources of additional income. The *suki* system appears to be beneficial to fishers in many situations. However, although fishers recognize several benefits from suki system, it appears to be a barrier for them to perform direct marketing to tourism markets. The identified problems and opportunities are important considerations in planning for strategic interventions to benefit the small-scale fishers and all the market actors involved in marketing reef-associated seafood.

In general, this study provided insights on the market system of reef-associated seafood in Lingayen Gulf, Philippines. The current market flow, marketing practices and the key market players were identified. Understanding these main features of marketing system could serve as basic knowledge for market development and interventions to support the market players particularly the small-scale fishers. A baseline data on the availability of reef-associated seafood and current consumers preferences were also analyzed. Based on the results, there is an increasing demand for reef-associated seafood from the local and tourism sector. However, the supply is declining. Such information could be useful in implementing stronger management regulations for ecologically important reef-associated seafood. The current problems and potential opportunities in marketing reef-associated seafood were also identified. Overall, results of this study could serve as baseline information that could be useful for policymakers and implementors in designing appropriate marketing strategies to enhance incomes from marketing reef-associated seafood and to strengthen management efforts for the sustainability of reef fisheries. To achieve these, a concerted effort and support from all the market players is important. A stronger and mutually beneficial partnership among market players should be established and sustained. Additionally, an effective financial assistance system for small-scale fishers is essential, especially during bad weather conditions and natural calamities, when small-scale fishers are most vulnerable. For further research, knowledge on tourists' motivations regarding their seafood preferences, including information on how much they are willing to pay for beach holiday trips and personalized experiences, should be considered. Such information could provide a better understanding on the extent and trends of the demand for seafood and tourism. A comprehensive monitoring of catch sizes, volume, and market prices of major fish and invertebrates, especially during peak season, should also be conducted.