

Food and Agriculture Organization of the United Nations

**VIRTUAL COURSE** 





26 March to 15 April 2021

# Design of an Active Surveillance for Tilapia Lake Virus (TILV) Disease and Its Implementation

TCP/INT/3707: Strengthening biosecurity (policy and farm level) governance to deal with Tilapia lake virus



Food and Agriculture Organization of the United Nations





**TILAPIA SECTOR PROFILE: PHILIPPINES** 

26 March 2021

# Production, Governance, and Health in the Philippines Part 1: Industry Profile

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TCP/INT/3707: Strengthening biosecurity (policy and farm level) governance to deal with Tilapia lake virus



# TILAPIA SECTOR PROFILE: PRODUCTION, GOVERNANCE AND HEALTH IN THE PHILIPPINES Part 1: Industry Profile

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A food-secure and resilient Philippines



with prosperous farmers and fisherfolk



# OUTLINE OF PRESENTATION

- 1. Philippine Fishery Resources At a Glance
- 2. Aquaculture Rank in the World (2018)
- 3. Aquaculture Contribution to National Economy
- 4. Contribution of Tilapia to Aquaculture Production
- 5. World Tilapia Production (Ranking)
- 6. Import/Export Data
- 7. Tilapia Aquaculture Production by Culture Unit and Environment 2020
- 8. Key Regions in Tilapia Production 2020
- 9. Genetically Improved Tilapia Strain & Other Tilapia Strains Available for Culture
- 10. Tilapia species present in the Wild
- 11. Major Fish Species Caught in Inland Municipal Fisheries 2015-2019
- 12. Role of BFAR-NFFTC in the Tilapia Industry
- 13. Government and Private Hatcheries for Tilapia
- 14. List of Registered Aqua Feed Mills
- 15. Local Movement Process Flow
- 16. Technologies to Intensify Tilapia Production
- 17. List of Tilapia Processing Facilities
- 18. Common Tilapia Forms
- 19. Government Interventions
- 20. Way Forward

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# Philippine Fishery Resources

5<sup>th</sup> longest coastline in the world

- (1) Canada
- (2) Indonesia
- (3) Greenland
- (4) Russia
- (5) Philippines

220 Million Ha. Philippine Waters 7x BIGGER than total land area Land Area: 29.8 million hectare

## **RESOURCES AT A GLANCE**



Source: **BFAR** 



- 8<sup>th</sup> among the top producing countries(4.354 million MT of fish, crustaceans, mollusks, and aquatic plants)
- Constitutes 2.06% of total world production
- 11<sup>th</sup> in aquaculture production of fish, crustaceans and mollusks (\$1.887B)
- 4<sup>th</sup> largest producer of aquatic plant (including Seaweeds) w/ production of 1.478 million MT

Source: Philippine Fisheries Profile 2019

## **Contribution to the National Economy (2020)**



### Aquaculture contributed the highest quantity and value among the three sub-sectors

# **Contribution of Tilapia to Aquaculture Production**



Source: Philippine Statistics Authority, 2020

## **World Tilapia Production**



Philippines ranked 6<sup>th</sup> in World's Tilapia Production in 2018

Source: Miano, M & Wang, W. (2021). Trends of Aquaculture Production and Trade: Carp, Tilapia and Shrimp, Journal of Asian Fisheries Science

# **Import Data**



# **Export Data**



## **TILAPIA PRODUCTION 2002-2020**



Source: Philippine Statistics Authority, 2020

### TILAPIA AQUACULTURE PRODUCTION BY CULTURE UNIT AND ENVIRONMENT 2020

	Freshwater	Brackishwater	Marine	Total
Fishpond	164,060.01	18,512.91		182,572.92
Fish cage	64,111.18	122.16	2.56	64,235.9
Fish pen	17,020.74	48.75	0.19	17,069.68
Rice fish	3.69			3.69
Small Farm Reservoir	83.13			83.13
Total	245,278.75	18,683.82	2.75	263,965.32





Source: Philippine Statistics Authority, 2020

## **KEY REGIONS IN TILAPIA PRODUCTION 2020**



Source: Philippine Statistics Authority 2020

### Genetically Improved Nile Tilapia Strains that are Available for Culture in the Philippines as of 2019

Name of Tilapia Strain*	Source Agency*	Description
Freshwater Aquaculture Center Selected Tilapia (FaST or IDRC Strain 39 <sup>th</sup> generation)	Freshwater Aquaculture Center, Central Luzon State University (FAC-CLSU), Science City of Muñoz, Nueva Ecija	Developed at Central Luzon State University – Freshwater Aquaculture Center (CLSU-FAC) Fish Genetics Projects from a sub-project at Aquaculture Genetics Network in Asia (AGNA)
Genetically Improved Farmed Tilapia – Malaysia Strain (GIFT- Malaysia)	Bureau of Fisheries and Aquatic Resources (BFAR in selected regions)	Originally developed from Genetic Improvement of Farmed Tilapia Project
Genetically Male Tilapia of YY Supermale Tilapia (GMT)	FAC-CLSU, Science City of Muñoz, Nueva Ecija	YY male technology conceptualizedas a breeding program that generates monosex tilapia (with yy genotypes instead of xy for normal males) providing alternnative to hormonal sex reversal and hybridization.
Improved EXCEL tilapia	BFAR-National Freshwater Fisheries Technology Center (BFAR-NFFTC), Science City of Muñoz, Nueva Ecija	<ul> <li>The product of the genetic program that emanates from the GIFT project was dubbed "BFAR GET 2002 EXCEL TILAPIA"</li> <li>The legacy continues, the BFAR-NFFTC is continuously disseminating iEXCEL Tilapia to further benefit the resource- poor fishfarmers.</li> </ul>

\*Source: Tilapia culture : the basics / Maria Rowena R. Romana-Eguia, Ruel V. Eguia, Rolando V. Pakingking, Jr. -- Tigbauan, Iloilo, Philippines : Aquaculture Dept., Southeast Asian Fisheries Development Center, 2020

### Genetically Improved Nile Tilapia Strains that are Available for Culture in the Philippines as of 2019

Name of Tilapia Strain*	Source Agency*	Description
Improved Brackishwater Enhanced Selected Tilapia	BFAR-NFFTC, Science City of Muñoz, Nueva Ecija	The product of the project "Development of Improved Breeds of Tilapia for Culture in Saline Waters" aimed to develop tilapia breed which could withstand brackishwater environment and also thrives well in it.
Cold Tolerant Tilapia strain	BFAR-NFFTC, Science City of Muñoz, Nueva Ecija	Another DA-BFAR-NFFTC initiative project to develop a breed of tilapia which could withstand the temperature of the Cordillera and our country's cold season, begetting year round supply of marketable size tilapia.
Molobicus	BFAR-National Integrated Fisheries Technology Development Center (BFAR-NIFTDC), Dagupan, Pangasinan	A tilapia hybrid developed by systematic crossings and back-crossings of two different species of tilapia ( <i>O. mossambicus</i> and <i>O. niloticus</i> ) that can grow very well similar to freshwater tilapia at very high water salinity
GenoMar Supreme Tilapia	GenoMar Philippines Incorporated, Science City of Muñoz, Nueva Ecija	Breeding nucleus is located at CLSU-FAC for GENOMAR strain development, growth rate, saline tolerance and fillet yield

\*Source: Tilapia culture : the basics / Maria Rowena R. Romana-Eguia, Ruel V. Eguia, Rolando V. Pakingking, Jr. -- Tigbauan, Iloilo, Philippines : Aquaculture Dept., Southeast Asian Fisheries Development Center, 2020

### **Other Tilapia Strains Available For Culture in the Philippines**

Name of Tilapia Strain	Source Agency	Description
SEAFDEC Strain	SEAFDEC, Rizal	A strain developed by SEAFDEC in 1999 based from the mass selection of 100 pairs of domesticate Thai Nile Tilapia (NIFI) stock also known as <i>Chitralada strain</i> , geared towards the improvement of growth of Nile tilapia on cage aquaculture.
<i>Oreochromis spp</i> . Red Tilapia	BFAR-NFFTC, Science City of Muñoz, Nueva Ecija	A hybrid of O. mossambicus, O. niloticus and O. aureus
BEST 200	San Miguel Corporation	A strain developed by San Miguel Corporation (SMC) in 1995 which underwent a selection process that aims to improve the growth of <i>O</i> . <i>niloticus</i> over other commercially available strains.
<i>Oreochromis hornorum</i> Hybrid	Negros Island	A saline-tolerant tilapia hybrid (male <i>Tilapia</i> <i>hornorum</i> crossed with female <i>Oreochromis</i> <i>niloticus</i> ) used for green water culture technology by Negros shrimp farmers

# Tilapia Species Present in the Wild

### Legend:

- O. niloticus
- Oreochromis spp. (Red Tilapia)
- O. mossambicus
- Sarotherodon melanotheron

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📙 T. zilli



### MAJOR FISH SPECIES CAUGHT IN INLAND MUNICIPAL FISHERIES 2015-2019

	Total Catch (MT)	Tilapia (MT)	% to Total	Major Fish Species	
2019	156,458.87	5,037.69	3.22	Others (42.11%) Carp (26.72%) Mudfish (8.75%) Gourami (5.29%) Freshwater goby (3.3%) <b>Tilapia (3.22%)</b>	Milkfish
2018	164,200.98	44,070.89	26.84	Others (41.37%) <b>Tilapia (26.84%)</b> Carp (8.93%) Mudfish (5.89%) Catfish (3.54%)	Tilapia
2017	163,870.46	43,240.00	26.39	Others (42.74%) Tilapia (26.39%) Carp (9.83%) Mudfish (5.80%) Catfish (4.83%)	Carp
2016	160,989.84	41,676.94	25.89	Others (44.38%) Tilapia (25.89%) Carp (9.11%) Mudfish (5.48%) Catfish (4.66%)	Freshwater Goby
2015	204,733.99	50,473.73	24.65	Others (42.32%) <b>Tilapia (24.65%)</b> Carp (14.99%) Mudfish (5.74%) Milkfish (4.06%)	Mudfish

FOO 308, Series of 2019: Guidelines on the Dispersal/Distribution of Fish Fingerlings and Broodstock

Source: Philippine Statistics Authority 2020

## **ROLE OF BFAR-NFFTC IN TILAPIA INDUSTRY**



As National Broodstock Center and breeding nucleus of Improved Tilapia breeders





## **BFAR-NFFTC** as the Breeding Nucleus

### **Fish Breeding Program**







TOTAL NO. OF TOS: 30 TOS 141.892 M Production Capacity





### Tilapia Hatchery & Grow-out Farms

#### **Region 1**

Registered Private Hatcheries = 2 Gov't. Hatcheries (Prov'l & Mun.) = 4 SUC Hatcheries = 3 Registered Grow-out Farms = 12 Non-registered Grow-out Farms = 4,231

#### **Region 2**

Registered Private Hatcheries = 13 Non-registered Private Hatcheries = 29 Gov't. Hatcheries (Prov'l & Mun.) = 8 SUC Hatcheries = 1 Registered Grow-out Farms = 18 Non-registered Grow-out Farms = 14,907

#### **Region 3**

Registered Private Hatcheries = 29 Non-registered Private Hatcheries = 28 Gov't. Hatcheries (Prov'l & Mun.) = 6 SUC Hatcheries = 3 Registered Grow-out Farms = 5 Non-registered Grow-out Farms = 12,869

#### **Region 4B**

Registered Private Hatcheries = 3 Registered Grow-out Farms = 2 Non-registered Grow-out Farms = 551



#### CAR

Registered Private Hatcheries = 4 Non-registered Private Hatcheries = 20 Gov't. Hatcheries (Prov'l & Mun.) = 15 SUC Hatcheries = 2 Registered Grow-out Farms = 6 Non-registered Grow-out Farms = 7,951

#### **Region 4A**

Non-registered Private Hatcheries = 25 Registered Grow-out Farms = 3 Non-registered Grow-out Farms = 57

#### **Region 5**

Registered Private Hatcheries = 18 Registered Grow-out Farms = 36 Non-registered Grow-out Farms = 176

### Tilapia Hatchery & Grow-out Farms

#### **Region 6**

Non-registered Private Hatcheries = 6 Gov't. Hatcheries (Prov'l & Mun.) = 11 Registered Grow-out Farms = 2 Non-registered Grow-out Farms = 3

#### **Region 7**

Registered Private Hatcheries = 4 Gov't. Hatcheries (Prov'l & Mun.) = 5 Registered Grow-out Farms = 4 Non-registered Grow-out Farms = 94

#### **Region 8**

Registered Private Hatcheries = 5 Non-registered Private Hatcheries = 3 Gov't. Hatcheries (Prov'l & Mun.) = 3 SUC Hatcheries = 2 Non-registered Grow-out Farms =

#### **Region 9**

Registered Private Hatcheries = 6 SUC Hatcheries = 2 Registered Grow-out Farms = 7 Non-registered Grow-out Farms = 951

#### **Region 10**

Registered Private Hatcheries = 1 Gov't. Hatcheries (Prov'l & Mun.) = 9 SUC Hatcheries = 1 Registered Grow-out Farms = 10 Non-registered Grow-out Farms = 1,041



		LUZ	VIS	MIN	TOTAL
atcheries	=				
te Hatcherie	s =				
rov'l & Mun.	) =				
	=				
t Farms	=				
v-out Farms	=				

#### **Region 11**

Non-registered Private Hatcheries = 2 Registered Grow-out Farms = 4 Non-registered Grow-out Farms = 3,388

#### **Region 12**

Registered Private Hatcheries = 2 Non-registered Private Hatcheries = 173 Registered Grow-out Farms = 1 Non-registered Grow-out Farms =

#### **Region 13**

Gov't. Hatcheries (Prov'l & Mun.) = 4 Registered Grow-out Farms = 5 Non-registered Grow-out Farms =

## **List of Registered Aqua Feedmills**

#### Region I (2)

Cargill Phils., Inc., Pangasinan
 San Miguel Foods, Incorporated, Pangasinan

#### Region 2 (2)

New Hope Isabela Agriculture, Inc., Isabela
 San Miguel Foods, Inc., Isabela

#### NCR (4)

General Milling Corp., Pasig City
 Universal Robina Corp., Pasig City
 Sahara Feeds Corp., Valenzuela City
 First El Presidente Mfg., Inc., Quezon City

#### Region 4A (9)

Armor Milling Corporation, Batangas
 Jetbest Animal Nutrition And Health Care, Inc., Batangas
 Lipa Agricultural Development Corp. (Ladeco), Batangas
 Limcoma Multi-purpose Cooperative, Batangas
 Primera Agro-development Corporation, Batangas
 Soro-soro Ibaba Development Cooperative, Batangas
 Solid One Mill Phils, Inc., Batangas
 Tower Feeds Corporation, Batangas

9) Welgro Phils, Inc., Cavite

#### Region 6 (2)

Phil. Foremost Milling Corp., Iloilo City
 Vitarich Corporation, Iloilo City

#### Region 7 (4)

Integrated Aquaculture Specialist, Inc., Mandaue City
 Marcela Farms, Inc., Bohol
 Oversea Feeds Corporation, Cebu City

4) Popular Feedmill Corporation, Cebu City

#### Region 10 (2)

San Miguel Foods, Inc., Bukidnon
 Tateh Premium Feeds Corp., Misamis Oriental

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### LUZON = 35VISAYAS = 6 MINDANAO = $\frac{7}{48}$

#### **Region 3 (18)**

1) Charoen Pokphand Foods Philippines Corp., Bataan 2) Charoen Pokphand Foods Philippines Corp., Tarlac 3) Grobest Feeds Philippines, Inc, Tarlac 4) New Hope Tarlac Agriculture, Inc., Tarlac 5) Charoen Pokphand Foods Philippines Corp., Bulacan 6) New Hope Bulacan Agriculture Inc., Bulacan 7) Feedmix Specialist, Inc Ii, Bulacan 8) Texicon Agri Ventures Corp., Bulacan 9) Cargill Phils., Inc., Bulacan 10) Hoc Po Feeds Corporation, Bulacan 11) Mersan Agri Development, Inc., Bulacan 12) Sunjin Phil Corporation, Bulacan 13) Santeh Feeds Corporation, Bulacan 14) Southeast Feed Specialist Corporation, Bulacan 15) New Hope Central Luzon Agri Inc., Pampanga 16) Feedworld, Inc, Pampanga 17) Gold Label Feedmill, Pampanga 18) Aces Agri-manufacturing Corp, Nueva Ecija **Region 11 (2)** 1) Julu Enterprises Incorporated, Davao City 2) Vitarich Corporation, Davao City

#### Region 12 (3)

Arowana Agriventures Corp., South Cotabato
 Tateh Premium Feeds Corp., South Cotabato
 San Miguel Foods Inc., General Santos City

### LOCAL MOVEMENT PROCESS FLOW

#### **Issuance of Health Certificate for Domestic Movement of**

#### Fish and Fishery/Aquatic Products

PROCESS FLOW	INTERFACES
Application	<ol> <li>Health Certificate Application Form</li> <li>Document requirements</li> </ol>
Desk Review Complete Incomplete Inform client on status of application	Document requirements
↓ Issuance of Order of Payment	Order of Payment
Payment	Official Receipt
Encoding and Review	<ol> <li>Health Certificate Application Form</li> <li>Document requirements</li> </ol>
◆ Approval and Signing	Health Certificate
Recording, Releasing and Filing	1. Health Certificate 2. Releasing Logbook 3. HC File Copy

### LOCAL MOVEMENT PROCESS FLOW

#### **Issuance of Local Transport Permit (LTP)**



### LOCAL MOVEMENT PROCESS FLOW

**Fisheries Office Order 241:** Mandatory screening for TiLV and Issuance of Health Certificate for Transboundary Movement of Tilapia for Aquaculture Purposes

Sector Of Age	Republic of the Philippines Department of Agriculture Bureau of Fisheries and Aquatic Resources PCA Compound, Elliptical Road, Diliman, Quezon City Tel. No. 9299597/9295847 Telefax No. 9298074
04 Augus	st 2017
Fisherie: Series of	s Office Order No. <u>241</u> 2017
	SUBJECT: Mandatory Screening for Tilapia Lake Virus (TiLV) and Issuance of Health Certificate for Transboundary Movement of Tilapia for Aquaculture Purposes
Tilapia l cultured observe confirme	Lake Virus (TiLV) is an emerging viral disease causing mortalities in wild and I tilapia. So far, tilapia is the known susceptible species. TiLV was originally d and reported in Israel, Ecuador, Colombia and Egypt. Recently, TiLV is ed in Thailand and Taiwan causing tilapia mortalities.
Based on nursery prevent transbou negative laborato Certifica	In the results of the on-going surveillance by BFAR, TiLV was detected in tilapia and hatchery in Bulacan and Bataan, respectively. In order to control and the spread of TiLV, tilapia (egg, fry, fingerling, juvenile, breeder) for undary movement intended for aquaculture purposes shall be screened and a for TiLV by BFAR Fish Health laboratory and other BFAR recognized ory. The result of the screening is a requirement for issuance of Health the by BFAR for transboundary movement.
This Ord hereby r	der takes effect immediately. All orders/memoranda inconsistent herewith are revoked.
	COMMODORE EDUARDO BGONGONA PCG (Ret) Director/Undersecretary for Fisheries

## **TECHNOLOGIES TO INTENSIFY PRODUCTION** Modified Intensive Tilapia Hatchery System

- Technology Adopted from Aqua
   Farming
   Tech, California,
   United States
- Increased tilapia production by at least 30%



Seining of breeders in pond



Collection of eggs



Cleaning of eggs



Rearing of fry in fine mesh hapaas

Set-up of Artificial Incubation System

Hatching of Eggs using Macdonald Jar

# **TECHNOLOGIES TO INTENSIFY PRODUCTION** Fry Rearing of Tilapia to Advanced Fingerling Stage



Fry from Artificial Incubation System



Stocking of fry to fine mesh rearing hapas



Feeding of fry



Advanced fingerling stage (3 weeks old, 2.4 g)



Grading and hauling of fingerlings for dispersal

# **TECHNOLOGIES TO INTENSIFY PRODUCTION**

## **Green Water Technology**

- A technique that cultures shrimps in water that is abundant in phytoplankton i.e. Chlorella, turning the water green hence, its name.
- The green water produced from tilapia helps control the growth of luminous bacteria that is bad for the growth of the shrimps.
- In this system, tilapia is also grown in the reservoir or net cages/ pens in the ponds.
- The green water technology consists of: pond preparation, water culture/fertilization, stocking and stock sampling, feeding management, water management and aeration, and harvest and post-harvest handling.





# **TECHNOLOGIES TO INTENSIFY PRODUCTION** Solar-Powered Venturi Aeration System



Aquaculture modernization through Solar-Powered Venturi Aeration System

**Solar-Powered Venturi Aeration System** is a pond energy-saving oxygen enhancer that aims to increase fisheries production through increasing the dissolved oxygen (D.O) in ponds with limited areas. **Higher D.O**  $\rightarrow$  **Higher Stocking Density** $\rightarrow$  **Higher Yield** 

Source: BFAR - Region 3 S

## List of Tilapia Processing Facilities



# **Common Tilapia Forms**



(Adapted from PRDP, 2014; The Technical Tilapia Committee, 2018)

# **Tilapia Ice Cream**



Daerrys Tilapia Ice cream line was awarded the Salon International de L'Agroalimentaire (SIAL) Innovation Gold Award 2016 (Photo from Nicolas Trentesaux https://twitter.com/TrentesauxN/status/737869693550243840 http://pbs.twimg.com/media/Cj1wk6BWYAAg9I4.jpg)

- A project of the Central Luzon State University (CLSU), Science City of Muñoz, Nueva Ecija, and funded by Department of Science and Technology.
- Made with tilapia fillet, all purpose cream, condensed and fresh milk, chopped walnut, and diced cheese.
- The flavor was a result of the study of Assistant Professor Dana D. Vera Cruz. The recipe was developed from the idea of Dr. Tereso A. Abella.
- The product name, *Daerrys*, was coined from the combination of the proponents' nicknames, Dana and Terry.
- The Tilapia Ice Cream line includes Original Flavored Tilapia Ice Cream, Tilapia Sansrival, Tilapia Ice Cream Pops, and Tilapia Ice Cream Sandwich.

## GOVERNMENT INTERVENTIONS TOWARDS INCREASING PRODUCTION AMIDST COVID-19 PANDEMIC

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**Fingerlings Distribution** 

**Techno Demo Projects** 

**Fishing Gear Paraphernalia** 

**Kadiwa Activities** 

Social Amelioration Program (SAP) Distribution

**Issuance of Food Pass and Local Transport Permit** 

**Credit Loan Assistance** 

**Plant, Plant, Plant Program** 1. Distribution of Aquaponics units

BASIL Program

- 1. Fingerlings Distribution
- 2. Components of BASIL Program to IUU Fishing







Photo source: DA and BFAR official website

# WAY FORWARD

Aggressively developing aquaculture

- 1. Continue implementation of tilapia hatchery technology
- 2. Technology demonstration of technologies developed
  - Rearing of fry to advance fingerlings (with particular use of low cost feeds) up to grow-out



)2 Ensuring the rehabilitation of fishery and aquatic resources

- 1. Production expansion in brackishwater and small water impoundments
- 2. Support resource enhancement of communal bodies of water

03 Developing the required post-harvest infrastructure

# WAYS FORWARD



Maximizing both domestic and export market potential

 Strengthening local and international market networking



05 Expanding Research for Development and Extension (RD&E) initiatives

- Broodstock development of tilapia (climate resilient tilapia breeds)
- Biotechnological approach in breeding and detection of pathogen
- Low-cost feed formulation



06 Legislative Reforms (Proposed creation of DFAR; Amendment of Sections of Fisheries Code)



# THANK YOU!



A food-secure and resilient Philippines



with prosperous farmers and fisherfolk