Supply Chain Analysis for the Philippine Abalone

Alice Prieto-Carolino[1,*], Rowena Paz L. Gelvezon[1], Hanny John P. Mediodia[1], Fe M. Gabunada[2], and Cherry Pilapil-Añasco[1]

[1] University of the Philippines Visayas, Philippines
[2] Visayas State University, Philippines

***Correspondence**

College of Management, University of the Philippines Visayas, Miagao, Iloilo City 5023, Philippines

T +63 33 513 7012
E aliceprieto@yahoo.com

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Abstract

Philippine abalone (*Haliotis asinina*) is the most abundant abalone species in the Philippines and is collected from the wild by either gleaning or diving. Abalone has a strong export potential especially to countries in East Asia. The country's highest volume of export was in 2004 with more than 600,000 kg valued at USD 3 million but the volume has continuously dropped. In 2012, the volume of abalone exports is only 300,000 kg valued at USD 1.5 million. This study examined the Philippine abalone industry using the supply chain analysis framework. This is a pioneering and exploratory research on the industry that surveyed 153 collectors from four major production areas in Iloilo, Palawan, Tawi-tawi, and Eastern Visayas; 41 traders; 29 trader-processors; and 7 exporters. Key informant interviews and focus group discussions were also employed. Results revealed that the abalone industry is solely dependent on supply from the wild and its sustainability is at risk given increased fishing activity due to increased demand in the world market, unregulated collection of brood stock and small-sized abalone, destructive collection practices, occurrence of natural calamities, and absence of policies on the management of abalone fisheries. Other findings are weak chain transparency and coordinative mechanisms, absence of common standards for classification and product processing, insufficiency of capital, and logistical issues. Policy recommendations are put forward to protect and increase the existing abalone stock from the wild alongside the development of abalone aquaculture.