Market Potential of Blue Swimming Crab (Portunus pelagicus)

Lebeth M. Rodrigues
Program Director
Importance of the Resources in the Philippines

- **Food**
  - Supports over 10,000 workers

- **Livelihood**
  - Exportation

Source: Yap, 2020, Seafood Watch, 2023
Product Flow in the Philippines

INPUT

FRESH RAW CRABS
- Iced
- Uniced

PRIMARY TRADING

FRESH RAW CRABS

PROCESSING

COOKED CRABS

PICKED CRABS
- Colossal / Jumbo lump
- Special lump
- Flowers
- Claw
- Legs
- Swimmers

LOCAL MARKET

INTERNATIONAL MARKET

DISTRIBUTION

- Raw crabs
- Picked crabs (legs / swimmers)
- Pasteurized canned crabs

- Pasteurized canned
- Value added cran products in institutional packs

CONSUMPTION

LOCAL CONSUMERS

INTERNATIONAL CONSUMERS

- Pasteurized canned
- Value added crab products in institutional packs
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LOCAL CONSUMERS

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Product Flow in the Philippines

FLOW DIAGRAM:

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  - Flowers
  - Claw
  - Legs

- PICKED CRABS
  - Pasteurized canned
  - Value added crab products in institutional packs

DISTRIBUTION:
- Raw crabs
- Processed crabs
- Local market
- International market
- International consumers

CONSUMPTION:
- Raw crabs
- Processed crabs
- Local consumers
- International consumers
Product Flow in the Philippines

**INPUT**
- FRESH RAW CRABS

**PRIMARY TRADING**
- FRESH RAW CRABS
  - Iced
  - Uniced

**PROCESSING**
- COOKED CRABS
  - Picked crabs (legs / swimmers)
  - Pasteurized canned crabs

**DISTRIBUTION**
- LOCAL MARKET
  - Raw crabs
  - Picked crabs (legs / swimmers)
  - Pasteurized canned crabs
- INTERNATIONAL MARKET
  - Pasteurized canned
  - Value added crab products in institutional packs

**CONSUMPTION**
- LOCAL CONSUMERS
- INTERNATIONAL CONSUMERS
  - Pasteurized canned
  - Value added crab products in institutional packs
Product Flow in the Philippines

- **Input:**
  - Raw crabs

- **Primary Trading:**
  - Fresh raw crabs (iced, uniced)

- **Processing:**
  - Cooked crabs
    - Colossal / jumbo lump
    - Special lump
    - Flowers
    - Claw
    - Legs
    - Swimmers

- **Distribution:**
  - Picked crabs (legs / swimmers)
  - Pasteurized canned crabs

  **Local Market**
  - Raw crabs
  - Picked crabs (legs / swimmers)
  - Pasteurized canned crabs

  **International Market**
  - Pasteurized canned
  - Value added crab products in institutional packs

- **Consumption:**
  - International consumers
    - Pasteurized canned
    - Value added crab products in institutional packs
Product Flow in the Philippines

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  - Uniced

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CONSUMPTION
- Raw crabs
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LOCAL MARKET

INTERNATIONAL MARKET
- Pasteurized canned
- Value added crab products in institutional packs

INTERNATIONAL CONSUMERS
- Pasteurized canned
- Value added crab products in institutional packs
Importers of the Philippine Crab Meat

[Map showing crabs in various parts of the world, including North America, Europe, Asia, and Australia.]
Top countries fishing wild blue swimming crab

(Percents of global production)

- **Indonesia**: 39.7% (39.7% Avoid)
- **China**: 27.3% (27.3% Unrated)
- **Thailand**: 14.4% (14.4% Avoid)
- **Philippines**: 12.8% (12.8% Avoid)
- **Bahrain**: 1.9% (1.9% Unrated)
Global Crab Market 2023-2027

Market Size Outlook (USD Billion)

2017: USD 14.91

Year-over-Year growth rate of 2023: 3.05%
CAGR 2022-2027: 3.15%
Growth Momentum: ACCELERATING

USD 2.88 Bn
Market size growth

www.technavio.com
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Accelerating Growth Momentum

Market size growth:
- 2022: USD 2.88 Bn
- 2027:

2017: USD 14.91
Crab Market: Growth Rate By Region (2022-27)

Source: Mordor Intelligence
Past. & Fresh Crab Meat Monthly Imports, All Origins
Source: Umer Barry, USDOC

16%
Why is Sustainable Seafood a Global Market Trend?
Market Key Drivers

1. Ecosystem Change
2. Ocean Governance
3. Influence of Corporation
4. Output and Efficiency of Seafood Systems
5. Consumer Demand
6. Nutrition

Source: Farmery et. al., 2022
Global Sustainable Seafood Market

Market forecast to grow at a CAGR of 5.1%

2021: USD 16.21 Billion
2030: USD 25.36 Billion

Increased by 9%
ECONOMIC IMPORTANCE IN THE PHILIPPINES

4TH
Marine fishery produced in the Philippines (2021)

2ND
Supplying 14% of Imports in the U.S. (2021)

$93M
Economic Value from U.S. Market (2022)

Source: Fisheries Statistics of the Philippines, 2021; Seafood Watch 2022; NMFS 2022
40% of the Harvest is from the Visayan Sea

Source: Yap, 2020, Seafood Watch, 2023
Figure 10. Annual catch per unit effort (cpue) in Kg/panel of crab gillnet in the Visayan Sea from 1991 to 2012 (Source: Mesa, 2019)
MEMORANDUM

TO: All concerned agencies

FROM: [Name]

DATE: [Date]

SUBJECT: Implementation of the Blue Swimming Crab (Portunus pelagicus) National Management Plan

The Department of Agriculture, through the Bureau of Fisheries and Aquatic Resources (BFAR), hereby issues a Memorandum to all concerned agencies to implement the Blue Swimming Crab (Portunus pelagicus) National Management Plan. This plan aims to protect and sustain the Blue Swimming Crab population for the benefit of the fishing communities and the country's fisheries sector.
International Certifying Organizations
Sustainability Framework: The Marine Stewardship Council (MSC) Fishery Standard

Stock Status
Stock Rebuilding
Harvest Strategy
Harvest Control Rules and Tools
Information/Monitoring
Assessment of Stock Status

Primary/Secondary/ETP Species
Habitat
Ecosystem
Outcome
Management Strategy
Information

Legal &/or Customary Framework
Consultation, Roles & Responsibilities
Long-term objectives
Fishery-specific objectives
Decision-making processes
Monitoring & Management Performance Evaluation
Compliance & enforcement

Stock Rebuilding
Sustainable Fish Stocks
Minimise Environmental Impacts
Effective Management

PRINCIPLE 1
PRINCIPLE 2
PRINCIPLE 3

Long-term objectives
Consultation, Roles & Responsibilities
Fishery-specific objectives
Monitoring & Management Performance Evaluation

Effective Management
Minimise Environmental Impacts
Sustainable Fish Stocks

Stock Status
Stock Rebuilding
Harvest Strategy
Harvest Control Rules and Tools
Information/Monitoring
Assessment of Stock Status
DEPARTMENT OF AGRICULTURE
BFAR

PHILIPPINE AGRICULTURE AND FISHERIES BIOTECHNOLOGY PROGRAM

PACPI
Philippine Association of Crab Processors, Inc.
An Association for Sustainable Crab Fisheries
Total Crab Instar 4 Produced: >500,000
Average production per run: 55K-60K
Average survival rate: >15%

Dispersal in Bohol
18 villages in 6 towns