Increasing the Profit Position of Women Small Scale Entrepreneurs in the Rock Oyster Industry of Samar, Philippines

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Outline

• Background Information

• Women’s Activities and Roles

• Women’s Access to Resources

• The Sisi Market and Profits

• Expanding Women’s Paid Work Spaces
Background Information
The Product: Rock Oyster

Local name: Sisi

Scientific Name: Saccostrea cucullata
• General Research Objective:
  ▫ To describe the value chain for fresh rock oyster or “sisi” using the gender perspective

• Specific Research Objectives:
  ▫ To determine the market potentials of “sisi” and the constraints that it faces.
  ▫ To identify measures by which women in the small-scale rock oyster production can enhance their profit positions.
Majaba Island, Sitio Basiao, Catbalogan City
- a small fishing community
- engaged in fishing, gathering shell fishes and rock oysters “paniti”
- 75 households and 80 families (as of 2015)
- reached in 1 hour by motorized (small) boat, from the main island of Samar
Majaba Island,
Sitio Basiao
Catbalogan, Samar
CLOA # 00279392 was issued on 27 Jan 1997, signed by Pres Fidel Ramos

- 1,303,087 sqm was awarded to 44 families under the Agrarian Reform Program
# Framework: Gender-Responsive Value Chain Analysis

<table>
<thead>
<tr>
<th>VC node</th>
<th>Input Provision</th>
<th>Production</th>
<th>Transformation / Processing</th>
<th>Trading</th>
<th>Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

## VC Activities

- **Male**
- **Female**

## VC Enablers

**Meso** --- women’s groups, associations, cooperatives, NGOs, Pos

**Macro** --- government agencies
The **gender-responsive value chain analysis** aims ...

1. to determine the gender differentials in roles, activities, needs, opportunities, constraints along the *sisi* VC

2. to identify the gender issues along the *sisi* VC, and generate recommendations for expanding paid work spaces of women, hence, improve profit positions
DATA COLLECTION, April - May 2015
- gender balance in samples

- Survey of respondents representing each value chain function
  - Different survey schedule per type of respondent

- Focus Group Discussion

- Key informant interviews
  - Different interview guides per type of KI

- Secondary data
Women’s Activities and Roles
## Demographic Profiles of the Respondents

<table>
<thead>
<tr>
<th>Input Providers</th>
<th>Sisi Gatherers</th>
<th>Processors</th>
<th>Traders</th>
<th>Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age: 52</td>
<td>40% are 26-30 years old</td>
<td>35 to 52 years old</td>
<td>40 to 65 years old</td>
<td>45 to 51 years old</td>
</tr>
<tr>
<td>All Male</td>
<td>60% Females and 40% Males</td>
<td>All Females</td>
<td>All Females</td>
<td>All Females</td>
</tr>
<tr>
<td>Blacksmith for more than 20 years.</td>
<td>Started gathering <em>sisi</em> since childhood</td>
<td>Started processing fermented <em>sisi</em> for more than 15 years</td>
<td>3 Sold fermented <em>sisi</em> for more than 20 years, 1 just started 3 years ago.</td>
<td>Consumed fermented <em>sisi</em> since childhood.</td>
</tr>
</tbody>
</table>
# Gender-Responsive Value Chain Map for Rock Oyster (Sisi), Majaba Island, Samar

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<thead>
<tr>
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<tr>
<td>Male</td>
<td>Female</td>
<td>Male</td>
<td>Female</td>
<td>Male</td>
</tr>
<tr>
<td>Fabricate <em>titi</em></td>
<td>Prepare the <em>titi</em>, <em>duklat</em>, container for <em>sisi</em></td>
<td>Wash fresh <em>sisi</em></td>
<td>Brings fresh and bottled <em>sisi</em> to the mainland</td>
<td></td>
</tr>
<tr>
<td>Sells <em>duklat</em></td>
<td>Gathers <em>sisi</em> (<em>paniti</em>)</td>
<td>Mix <em>sisi</em> with salt (ferment)</td>
<td>Peddling</td>
<td></td>
</tr>
<tr>
<td>Provides the boat</td>
<td></td>
<td>Bottling Sorting Packing</td>
<td>Vending (stores)</td>
<td></td>
</tr>
</tbody>
</table>

### VC Activities

- **All-male work**
- **Men gather *sisi only* when they are not catching fish due to boat unavailability or to bad weather.**
- **No male processors**
- **Males man the boat that brings women to the mainland**
Women’s Access to Resources
Access to rock oyster grounds

Sisi gathering (paniti) takes place
- only during low tide, when rocks are exposed
- only for limited hours per day
- only when the weather is good
- only on rocks accessible to gatherers

Freshly gathered sisi
Women and girls have to look for rocks farther and farther away from home.

Women depend on men’s availability to bring them by boat to far rock islands.

Rock oysters are abundant on certain seasons.
Access to processing technology

Very traditional method of preserving *sisi*: fermentation.

The only value-addition made on the fresh *sisi* is fermentation (use of salt); product has short shelf life.
**Influence on product price**

*Sisi* gatherer accepts whatever price the processor offers for freshly gathered *sisi*.

Price of fermented *sisi* is largely set by the processor; discounts to regular buyers.
Access to financing

Processor provides the boat used by sisi gatherers to go to rock islands, with the condition that harvest will be sold to them at a lower price (25 cents instead of 27 cents per can).

Gatherers do not process own harvest due to lack of capitalization.
Access to training/capacity building

The older women who process sisi report that there was once a training conducted but the younger ones have not attended any.
# Opportunities and Constraints

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>VC FUNCTION</th>
<th>CONSTRAINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fabrication of <em>titi</em> made from better materials</td>
<td>INPUT</td>
<td>Fabricated <em>titi</em> is prone to rust immediately; poor quality</td>
</tr>
<tr>
<td>Provision of sanitary tools/equipment</td>
<td>PROVISION</td>
<td>Containers are empty sardine cans</td>
</tr>
<tr>
<td>There are still a lot of fresh <em>sisi</em> in other oyster</td>
<td></td>
<td>Heavily dependent on weather and sea conditions</td>
</tr>
<tr>
<td>rocks/gathering grounds</td>
<td>PRODUCTION</td>
<td>Exposure of rock oyster gatherers to hazards: <em>wounds, long hours of work</em></td>
</tr>
<tr>
<td>R&amp;D to study on the culture of rock oysters for increased production (while at the same time giving safer work places)</td>
<td></td>
<td><em>under the sun, backache, muscle pain, fatigue/tired from squatting for hours, strains due to repetitive motion, skin rash and bruises</em></td>
</tr>
<tr>
<td>OPPORTUNITIES</td>
<td>VC FUNCTION</td>
<td>CONSTRAINTS</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------</td>
<td>-------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Value-added products from rock oyster</td>
<td>PROCESSING</td>
<td>No post-harvest facility</td>
</tr>
<tr>
<td>R&amp;D to lengthen shelf life</td>
<td></td>
<td>Sanitary and hygienic concerns in processing</td>
</tr>
<tr>
<td>Business potential is high if market is expanded</td>
<td></td>
<td>Processors are hesitant to use new packaging method</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Processing technique/skills are limited to fermentation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lack of entrepreneurial skills of processors</td>
</tr>
<tr>
<td>Market expansion and penetration with more product innovation</td>
<td>TRADING</td>
<td>Inconsistent supply of processed sisi</td>
</tr>
<tr>
<td>Product is demand as gift items, as appetizer, and as main course (various forms possible)</td>
<td></td>
<td>Poor product quality damages business</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No storage facility</td>
</tr>
</tbody>
</table>
The Sisi Market and Profits
# The Rock Oyster Market

<table>
<thead>
<tr>
<th>VC player/ operator</th>
<th>Supply</th>
<th>Demand</th>
<th>Product Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input provider</td>
<td>Home-made or improvised <em>titi</em>&lt;sup&gt;1&lt;/sup&gt; Bought from a local fabricator</td>
<td>Mostly home-made; lasts for 3 years; must be sharpened 2-3 times a year</td>
<td>PhP100 (US$1.88)</td>
</tr>
<tr>
<td>Rock oyster gatherer</td>
<td>Mostly done daily up to 10 hours a day, depending on the tide, season, and weather Output: 9 cans/day (max)</td>
<td>All harvests are bought mostly by processors; lesser by regular buyers/households</td>
<td>Fresh <em>sisi</em> per can PhP13-PhP14 (25-27 cents)</td>
</tr>
</tbody>
</table>

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<sup>1</sup> *titi* is a type of oyster processing tool.
A can of fresh *sisi* is sold at PhP14 per can (or 27 cents)

But if the gatherer chooses to make use of the motorboat provided by the processor to whom he or she will sell his or her gathered *sisi*, it will be sold at PhP13 per can (or 25 cents)
## The Rock Oyster Market

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<tr>
<td>Processor</td>
<td>10 - 15 dozens/week of bottled fermented <em>sisi</em> per processor</td>
<td>All are sold except in months when low tide is long and there are more fresh <em>sisi</em> in the market</td>
<td>Surplus: PhP320 to 350/doz (US$6 to 6.60)</td>
</tr>
<tr>
<td>Trader</td>
<td>As produced by the processors</td>
<td>Deliveries are all sold within a week</td>
<td>Shortage: PhP400 to PhP450/doz (US$7.55 to 8.5)</td>
</tr>
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Surplus: PhP320 to 350/doz (US$6 to 6.60)

Shortage: PhP400 to PhP450/doz (US$7.55 to 8.5)
When there are surpluses, processors store *sisi* in ice buckets.

Bottles of fermented *sisi*, tied by dozen.
Who gains more in the industry?

Gathering
- Price Received Per Bottle (Php): PhP 9.33
- Share of Value: 23%

Processing
- Price (Php): 35.00
- Share of Value: 64%

Trading
- Price (Php): 40.00
- Share of Value: 13%

Source: Gariando, IC (2015)
## What do consumers say about the product?

<table>
<thead>
<tr>
<th>Pluses</th>
<th>Minuses</th>
</tr>
</thead>
<tbody>
<tr>
<td>High demand from <em>balikbayan</em> and tourists</td>
<td>Health concerns due to high salt content of fermented <em>sisi</em></td>
</tr>
<tr>
<td>Has a good taste as an appetizer</td>
<td>Quality and sanitary issues because of low quality packaging</td>
</tr>
<tr>
<td>Affordable and accessible by locals and the island <em>sitio</em></td>
<td>Trust issue on the processing: hygienic? Meet standards? Sanitary?</td>
</tr>
<tr>
<td>Gift item for guests/visitors</td>
<td>Short shelf life</td>
</tr>
<tr>
<td>Portable</td>
<td>Some bottles explode</td>
</tr>
<tr>
<td>A daily food for locals</td>
<td>Bottle not presentable</td>
</tr>
</tbody>
</table>
Expanding Women’s Paid Work Spaces
At its state, the rock oyster industry remains as a poor driver of local economic growth

- unexplored demand outside the locale
- limited market due to lack of food innovation and value-added products
- poor sanitary quality product
- lack of R&D on increasing production
- missing storage and post-harvest facilities

However, it has a high income potential for women along the value chain
Enabling Strategies

VC Function

Input Provision
- Culturing of Fresh Sisi
  - Appropriate Compensation
  - Production Technologies

“Sisi” Gathering
- Product Development and Innovation
  - Post Harvest Facilities
  - Value-addition

“Sisi” Processing

Trading
- Market Research
- Market Expansion
- Start-ups

Consumption

Private/Business Linkages: vertical and horizontal, organization of operators into association or cooperative

Policy Creation and Enforcement: Standardization, funding of production technologies, quality control and sanitation

Capacity Development for women: Entrepreneurial Training
  - Women empowerment initiatives

Samar State University, LGU- Catbalogan City
Department of Trade and Industry, Department of Science and Technology
(ROCK OYSTER INDUSTRY DEVELOPMENT ROADMAP)
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