



MAP CEO Academy Webinar

PUSHING FOR LIVESTOCK INDUSTRY DEVELOPMENT

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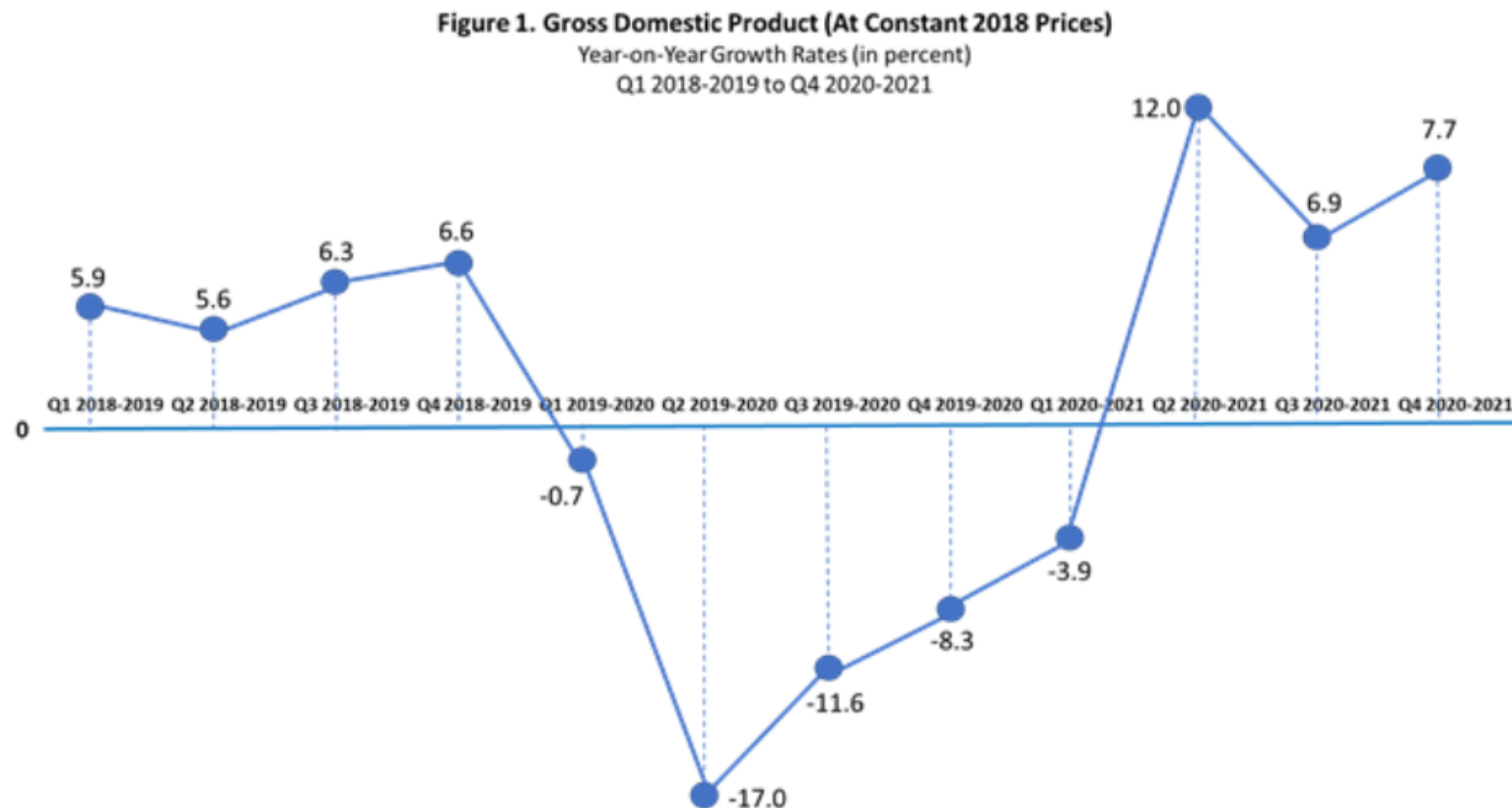
President, DVF Dairy Farm, Inc.

April 29, 2022

GDP Posted a Growth of 7.7 Percent in the Fourth Quarter of 2021, Resulting in a 5.6 Percent Full-year Growth in 2021

Reference Number: 2022-41

Release Date: Thursday, January 27, 2022



Source: Philippine Statistics Authority

Table 1a. Value of Production in Agriculture at Constant 2018 Prices
First Quarter 2019 to Fourth Quarter 2021
(in Million PhP)

Subsector	2019				2020				2021				January to December		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2019	2020	2021
Crops	245,801	226,028	210,053	286,230	239,871	237,367	220,011	285,303	247,736	244,674	219,632	292,764	968,111	982,552	1,004,805
Livestock	78,208	83,588	79,228	87,083	78,082	76,486	73,229	75,880	59,786	61,743	62,047	68,531	328,107	303,676	252,108
Poultry	60,474	60,403	60,813	63,591	60,574	57,535	58,523	60,078	56,053	58,987	59,260	61,697	245,281	236,710	235,997
Fisheries	59,120	70,292	64,739	75,263	57,329	70,982	65,964	71,549	57,463	70,224	65,973	72,553	269,415	265,824	266,212
AGRICULTURE	443,602	440,311	414,834	512,168	435,856	442,369	417,727	492,810	421,038	435,628	406,911	495,545	1,810,914	1,788,762	1,759,122

27.75%

Note: Details may not add up to totals due to rounding

Source: Philippine Statistics Authority

Figure 4.10: Budget repartition of the projects part of the Plant, Plant, Plant program

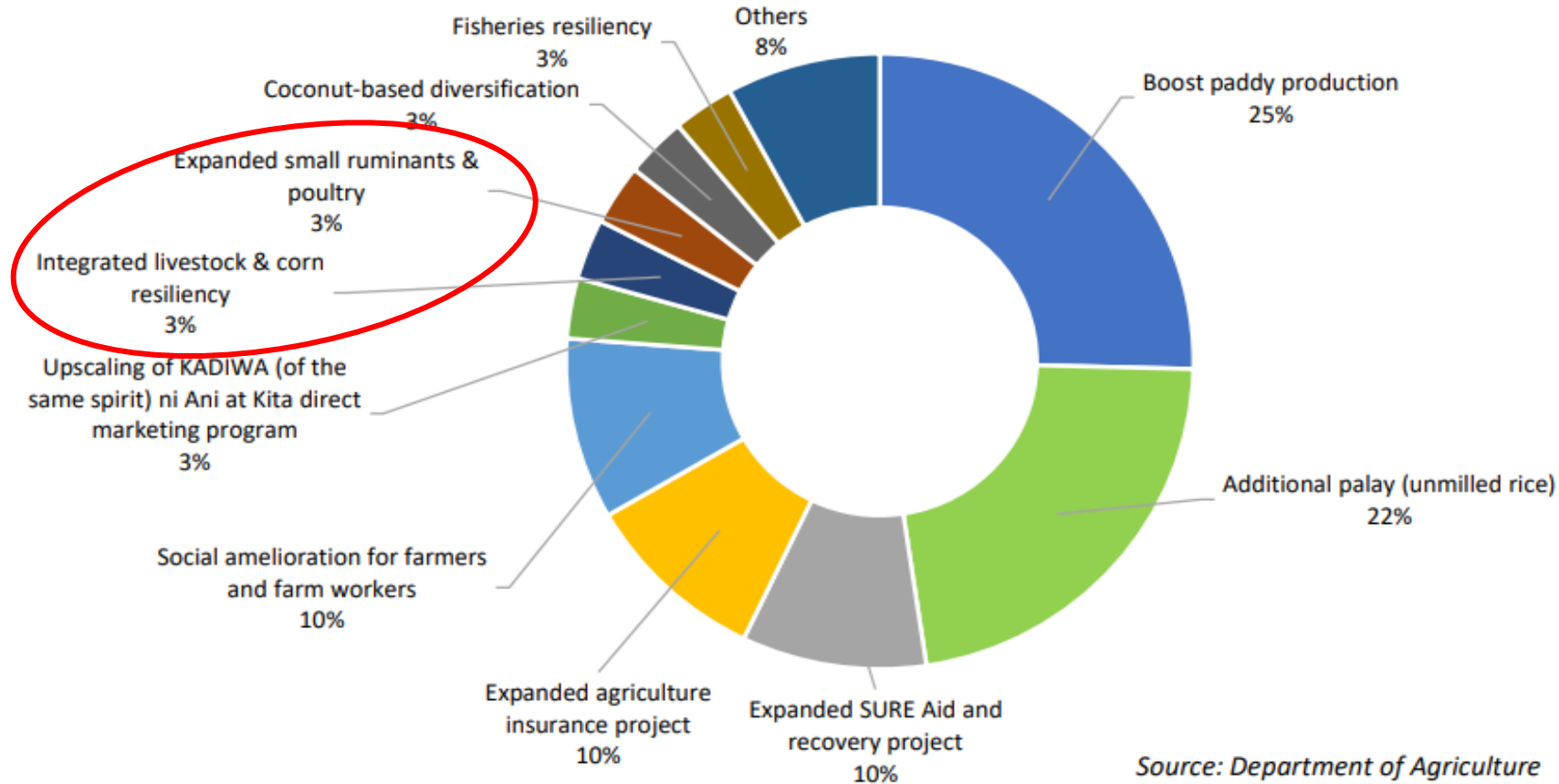


Table 1c. Value of Livestock and Poultry Production at Constant 2018 Prices
First Quarter 2019 to Fourth Quarter 2021
(in Million PhP)

Subsector/ Commodity	2019				2020				2021				January to December		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2019	2020	2021
Livestock	78,208	83,588	79,228	87,083	78,082	76,486	73,229	75,880	59,786	61,743	62,047	68,531	328,107	303,676	252,108
Hog	66,125	70,408	66,851	71,419	66,271	66,756	61,675	61,563	49,154	49,284	50,667	53,814	274,803	256,265	202,919
Cattle	6,502	7,016	6,524	8,312	6,429	4,950	5,874	7,679	5,647	6,563	5,721	7,763	28,355	24,932	25,694
Carabao	2,829	3,506	2,898	4,180	2,774	2,575	2,675	3,458	2,541	3,251	2,881	3,659	13,413	11,482	12,332
Goat	2,518	2,415	2,713	2,927	2,362	1,950	2,723	2,905	2,192	2,407	2,507	3,016	10,572	9,939	10,122
Dairy	234	243	243	245	245	255	282	276	252	238	272	280	964	1,058	1,042
Poultry	60,474	60,403	60,813	63,591	60,574	57,535	58,523	60,078	56,053	58,987	59,260	61,697	245,281	236,710	235,997
Chicken	43,606	44,864	44,571	46,170	43,099	41,374	41,372	42,507	38,259	40,726	40,809	42,390	179,210	168,352	162,184
Duck	931	548	776	797	874	505	794	826	773	699	777	716	3,052	2,999	2,964
Chicken Eggs	14,859	13,676	14,411	15,342	15,503	14,353	15,278	15,405	15,909	16,237	16,518	17,367	58,288	60,540	66,031
Duck Eggs	1,078	1,315	1,055	1,283	1,098	1,303	1,079	1,339	1,112	1,326	1,155	1,224	4,731	4,819	4,817

=80.5%

=68.7%

Note: Details may not add up to totals due to rounding

Source: Philippine Statistics Authority

Table 7b. Volume of Livestock and Poultry Production
First Quarter 2019 to Fourth Quarter 2021
(in Thousand Metric Tons)

Subsector/ Commodity	2019				2020				2021				January to December		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2019	2020	2021
Livestock															
Hog	567.42	580.11	551.62	597.51	568.67	550.02	508.91	515.05	421.79	406.07	418.07	450.22	2,296.65	2,142.65	1,696.15
Cattle	61.30	65.20	59.27	74.85	60.62	46.00	53.36	69.15	53.24	60.99	51.97	69.91	260.62	229.13	236.11
Carabao	30.40	37.67	30.05	42.54	29.80	27.67	27.74	35.19	27.30	34.93	29.87	37.24	140.66	120.41	129.34
Goat	18.87	17.59	19.19	20.71	17.70	14.20	19.27	20.55	16.43	17.53	17.74	21.34	76.36	71.72	73.04
Dairy	6.14	6.27	6.01	5.96	6.44	6.58	6.97	6.72	6.62	6.14	6.72	6.82	24.38	26.71	26.30
Poultry															
Chicken	459.06	477.11	465.15	526.09	453.72	440.00	431.77	484.36	402.77	433.11	425.89	483.03	1,927.41	1,809.85	1,744.80
Duck	9.62	5.33	7.52	7.63	9.03	4.92	7.69	7.91	7.98	6.81	7.53	6.86	30.10	29.55	29.17
Chicken Eggs	142.01	141.45	145.54	154.23	148.17	148.45	154.29	154.87	152.05	167.93	166.82	174.58	583.23	605.79	661.39
Duck Eggs	11.17	13.89	10.98	13.53	11.37	13.76	11.23	14.12	11.52	14.00	12.02	12.91	49.57	50.48	50.45

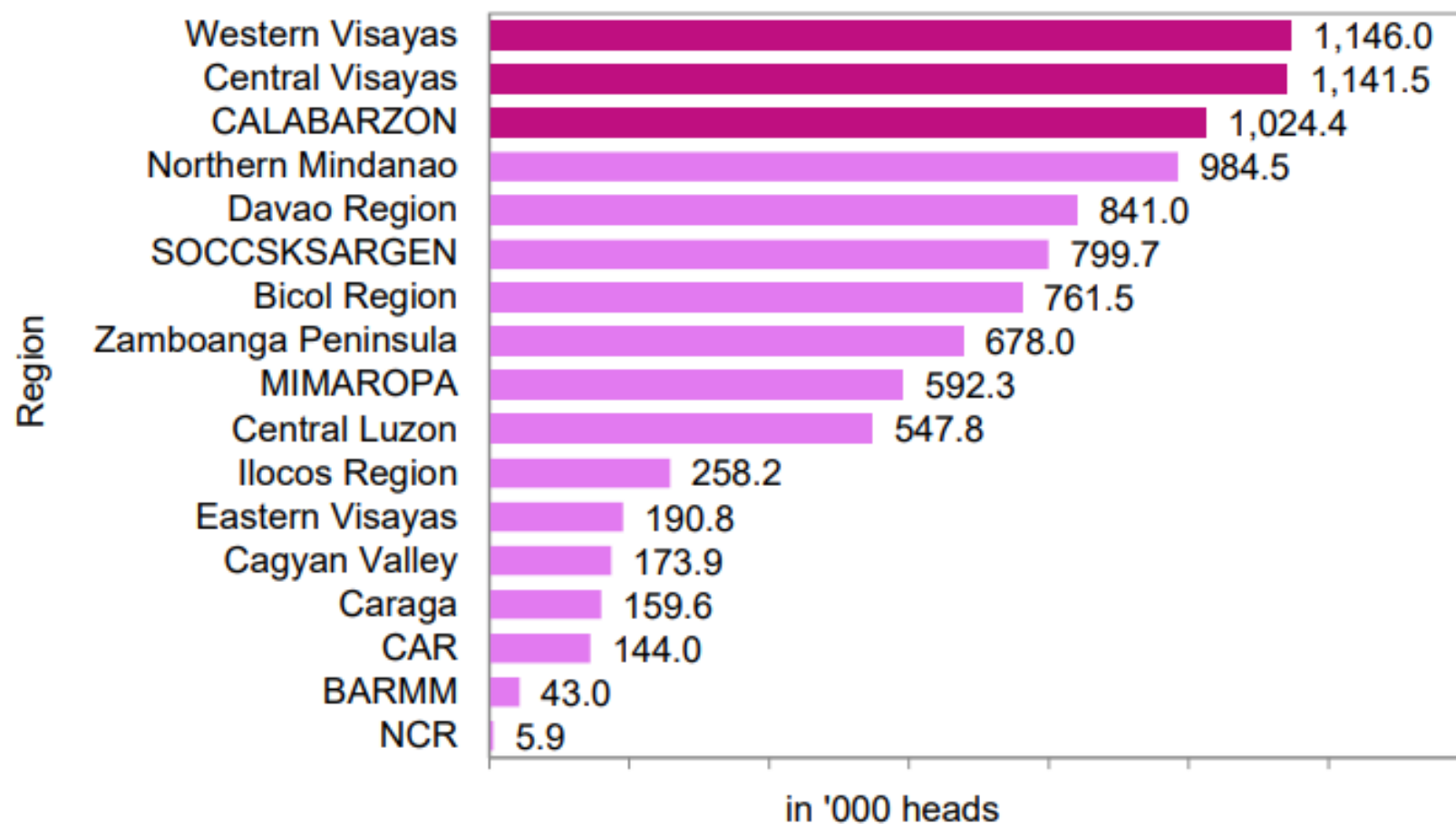
Source: Philippine Statistics Authority

Table 2. Swine Inventory by Farm Type and Region, Philippines
As of 01 January 2020-2022^p

Farm Type	Inventory (in number of heads)			Annual Growth Rate (in percent)		Percent Share
	2020	2021 ^r	2022 ^p	2021 ^r	2022 ^p	2022 ^p
Total						
Philippines	12,795,721	9,943,119	9,492,230	-22.3	-4.5	100.0
NCR	-	-	5,930			0.1
CAR	270,933	223,403	144,010	-17.5	-35.5	1.5
I - Ilocos Region	663,086	366,229	258,210	-44.8	-29.5	2.7
II - Cagayan Valley	421,076	262,875	173,921	-37.6	-33.8	1.8
III - Central Luzon	2,164,853	552,010	547,774	-74.5	-0.8	5.8
IVA - CALABARZON	1,575,711	1,077,408	1,024,414	-31.6	-4.9	10.8
MIMAROPA Region	523,516	505,244	592,272	-3.5	17.2	6.2
V - Bicol Region	891,457	763,640	761,514	-14.3	-0.3	8.0
VI - Western Visayas	1,219,234	1,211,118	1,146,009	-0.7	-5.4	12.1
VII - Central Visayas	1,107,889	1,178,046	1,141,474	6.3	-3.1	12.0
VIII - Eastern Visayas	266,320	254,706	190,831	-4.4	-25.1	2.0
IX - Zamboanga Peninsula	608,532	632,448	678,031	3.9	7.2	7.1
X - Northern Mindanao	1,059,320	990,765	984,533	-6.5	-0.6	10.4
XI - Davao Region	941,256	871,721	841,030	-7.4	-3.5	8.9
XII - SOCCSKSARGEN	800,434	780,515	799,720	-2.5	2.5	8.4
XIII - Caraga	231,685	223,325	159,550	-3.6	-28.6	1.7
BARMM	50,419	49,666	43,007	-1.5	-13.4	0.5
Backyard						
Philippines	7,971,400	7,205,749	6,702,626	-9.6	-7.0	100.0
NCR	-	-	5,930	-	-	0.1
CAR	266,841	219,827	142,253	-17.6	-35.3	2.1
I - Ilocos Region	506,130	275,792	184,804	-45.5	-33.0	2.8
II - Cagayan Valley	379,115	235,600	150,445	-37.9	-36.1	2.2
III - Central Luzon	432,619	293,804	181,537	-32.1	-38.2	2.7
IVA - CALABARZON	386,424	332,549	303,542	-13.9	-8.7	4.5
MIMAROPA Region	394,278	380,863	467,157	-3.4	22.7	7.0
V - Bicol Region	760,699	697,911	682,254	-8.3	-2.2	10.2
VI - Western Visayas	1,075,359	1,072,407	1,017,311	-0.3	-5.1	15.2
VII - Central Visayas	845,435	853,730	805,234	1.0	-5.7	12.0
VIII - Eastern Visayas	250,954	239,725	176,936	-4.5	-26.2	2.6
IX - Zamboanga Peninsula	591,216	616,607	664,620	4.3	7.8	9.9
X - Northern Mindanao	604,132	559,699	569,736	-7.4	1.8	8.5
XI - Davao Region	758,536	741,670	718,590	-2.2	-3.1	10.7
XII - SOCCSKSARGEN	453,060	426,662	443,720	-5.8	4.0	6.6
XIII - Caraga	216,183	209,237	145,550	-3.2	-30.4	2.2
BARMM	50,419	49,666	43,007	-1.5	-13.4	0.6

Region/ Farm Type	Inventory (in number of heads)			Annual Growth Rate (in percent)		Percent Share
	2020	2021 ^r	2022 ^p	2021 ^r	2022 ^p	2022 ^p
<u>Commercial</u>						
Philippines	4,824,321	2,737,370	2,789,604	-43.3	1.9	100.0
NCR	-	-	-	-	-	-
CAR	4,092	3,576	1,757	-12.6	-50.9	0.1
I - Ilocos Region	156,956	90,437	73,406	-42.4	-18.8	2.6
II - Cagayan Valley	41,961	27,275	23,476	-35.0	-13.9	0.8
III - Central Luzon	1,732,234	258,206	366,237	-85.1	41.8	13.1
IVA - CALABARZON	1,189,287	744,859	720,872	-37.4	-3.2	25.8
MIMAROPA Region	129,238	124,381	125,115	-3.8	0.6	4.5
V - Bicol Region	130,758	65,729	79,260	-49.7	20.6	2.8
VI - Western Visayas	143,875	138,711	128,698	-3.6	-7.2	4.6
VII - Central Visayas	262,454	324,316	336,240	23.6	3.7	12.1
VIII - Eastern Visayas	15,366	14,981	13,895	-2.5	-7.2	0.5
IX - Zamboanga Peninsula	17,316	15,841	13,411	-8.5	-15.3	0.5
X - Northern Mindanao	455,188	431,066	414,797	-5.3	-3.8	14.9
XI - Davao Region	182,720	130,051	122,440	-28.8	-5.9	4.4
XII - SOCCSKSARGEN	347,374	353,853	356,000	1.9	0.6	12.8
XIII - Caraga	15,502	14,088	14,000	-9.1	-0.6	0.5
BARMM	-	-	-	-	-	-

Figure 3. Distribution of Swine Inventory by Region, Philippines
As of 01 January 2022^P



^P – preliminary

Source: Philippine Statistics Authority

Table 8b. Growth Rates of Volume of Livestock and Poultry Production
First Quarter 2019 to Fourth Quarter 2021
(in percent)

Subsector/ Commodity	2019-2020				2020-2021				January to December	
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2019-2020	2020-2021
Livestock										
Hog	0.2	-5.2	-7.7	-13.8	-25.8	-26.2	-17.8	-12.6	-6.7	-20.8
Cattle	-1.1	-29.5	-10.0	-7.6	-12.2	32.6	-2.6	1.1	-12.1	3.0
Carabao	-2.0	-26.5	-7.7	-17.3	-8.4	26.2	7.7	5.8	-14.4	7.4
Goat	-6.2	-19.3	0.4	-0.8	-7.2	23.4	-7.9	3.8	-6.1	1.8
Dairy	4.9	5.0	16.0	12.7	2.8	-6.6	-3.6	1.4	9.6	-1.5
Poultry										
Chicken	-1.2	-7.8	-7.2	-7.9	-11.2	-1.6	-1.4	-0.3	-6.1	-3.6
Duck	-6.2	-7.8	2.3	3.7	-11.6	38.4	-2.1	-13.3	-1.8	-1.3
Chicken Eggs	4.3	4.9	6.0	0.4	2.6	13.1	8.1	12.7	3.9	9.2
Duck Eggs	1.8	-1.0	2.3	4.4	1.3	1.8	7.1	-8.6	1.8	-0.1

Source: Philippine Statistics Authority

Table 5.1: The Philippines Pork Balance, 2008-2030f

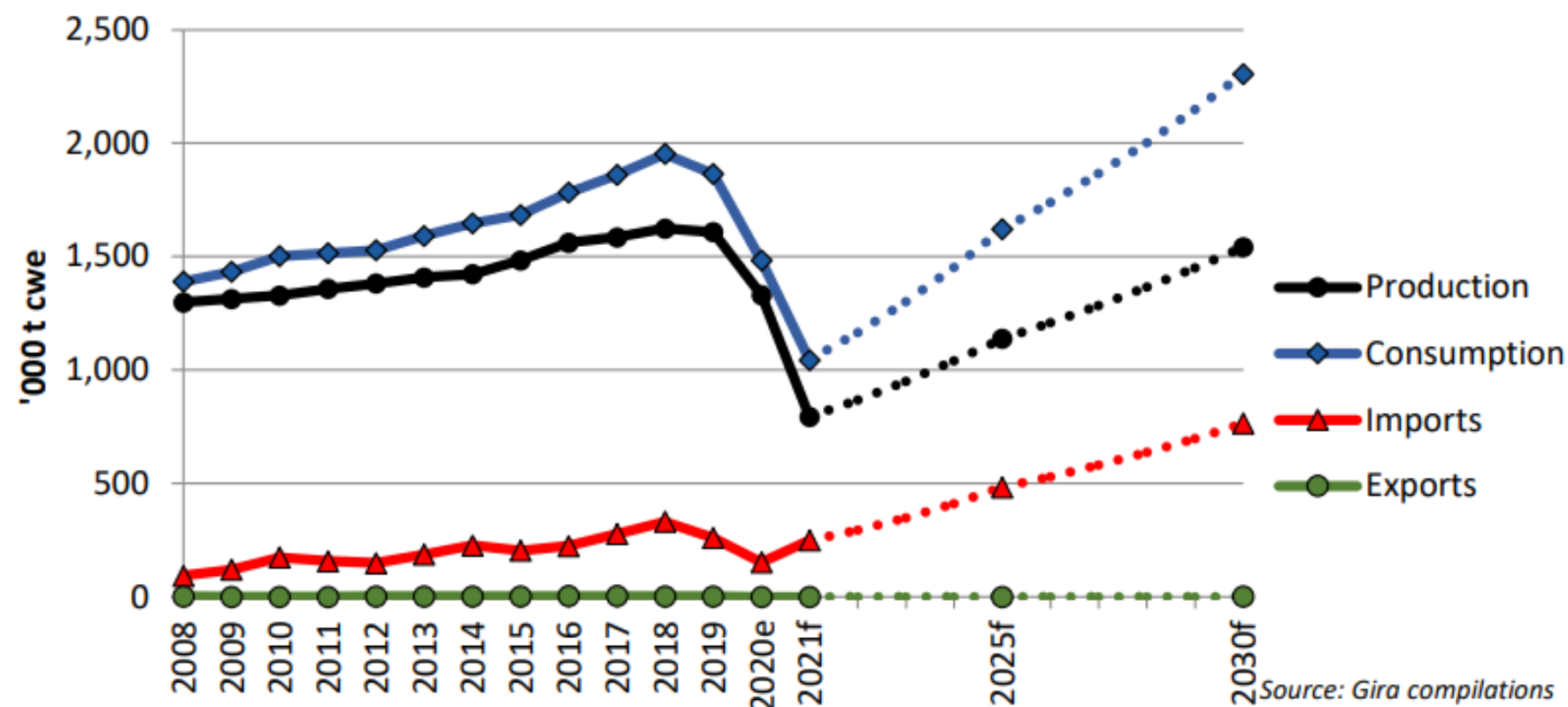


Table 3. Monthly Average Farmgate Price of Hogs Upgraded for Slaughter
(Backyard), Philippines: October-December 2019^r-2021^p

Month	Average Farmgate Price (PhP per kilogram, liveweight)			Annual Growth Rate (in percent)	
	2019 ^r	2020 ^r	2021 ^p	2020 ^r	2021 ^p
Average	102.12	125.60	152.43	23.0	21.4
October	102.11	117.79	143.35	15.4	21.7
November	101.31	126.01	152.41	24.4	21.0
December	102.94	133.00	161.52	29.2	21.4

Table 9b. Average Farmgate Prices of Livestock and Poultry
First Quarter 2019 to Fourth Quarter 2021
(PhP Per Kilogram)

Subsector/ Commodity	2019				2020				2021				January to December		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2019	2020	2021
Livestock															
Hog	113.97	113.35	108.09	96.13	105.95	111.04	112.53	129.07	161.08	168.79	154.58	154.17	107.76	114.38	159.49
Cattle	110.85	111.66	113.83	118.29	126.62	127.57	127.99	132.49	143.71	148.32	152.53	148.44	113.87	128.98	148.25
Carabao	97.46	98.03	99.92	101.87	108.87	108.20	109.18	112.62	120.08	125.57	125.74	127.04	99.47	109.89	124.88
Goat	146.78	150.94	151.13	154.29	148.49	149.66	149.60	154.85	163.88	169.97	169.51	174.25	150.87	150.84	169.74
Dairy	41.76	42.50	42.50	41.64	44.26	44.25	45.41	46.77	53.36	52.80	53.17	54.70	42.10	45.19	53.53
Poultry															
Chicken	81.93	82.98	91.50	97.96	93.92	94.37	97.95	109.83	118.77	110.19	102.90	111.98	88.88	99.25	110.89
Duck	110.31	114.48	117.91	129.73	117.55	129.94	135.54	151.21	157.23	167.42	152.65	170.75	117.87	133.31	161.60
Chicken Eggs	100.52	100.80	109.17	119.10	118.38	121.07	123.33	122.55	122.96	117.75	113.05	114.22	107.66	121.36	116.83
Duck Eggs	97.94	97.87	103.88	104.96	105.97	104.18	107.19	105.38	109.86	105.40	107.45	108.95	101.15	105.59	107.82

Source: Philippine Statistics Authority

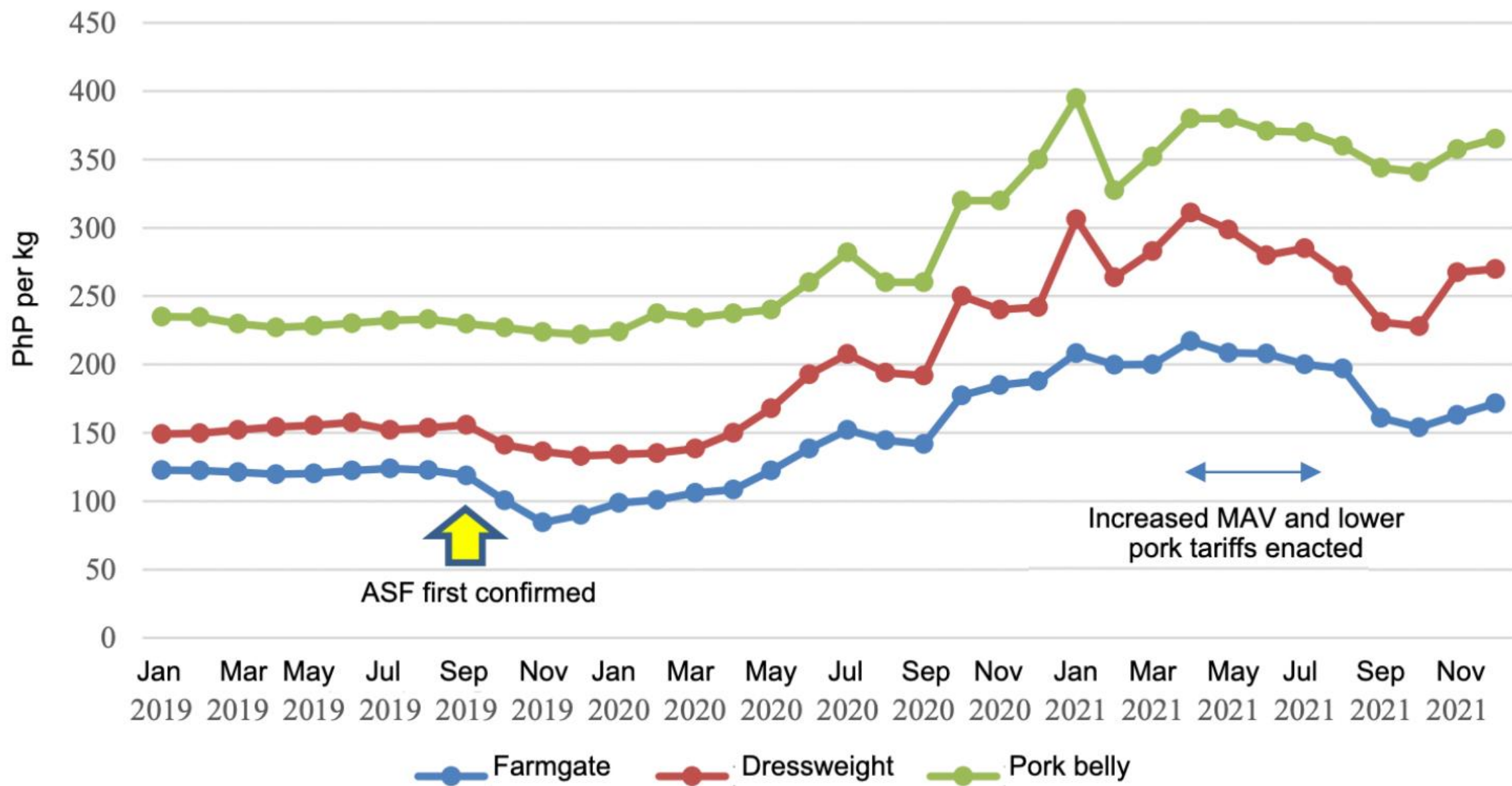


Table 5.3: The largest Pig Growers in the Philippines

Rank	Company	Operating area	Country of Origin	Species	Main Meat Brands	Slaughterhouse	Own RT / FS	JV & Partnership	# piglets per year (hd)	Pork production cwe (T)	MS
1.	San Miguel foods inc	National	PH	Broiler Hog Cattle	- Monterey (chilled pork) - Pure Foods (canned, frozen) - Magnolia (chicken)	AAA	Monterey meatshop (RT)	Hormel	700 000	44 100	2,8%
2.	Charoen Pokhand Food corp (CP)	National	TH	Broiler Hog Layer	-	Plan to build AAA	- Chicken star (FS) - Meatshop (RT)	-	550 000	34 650	2,2%
3.	Foremost farm	Luzon	PH	Hog	-	-	-	La Filipina	250 000	15 750	1,0%
4.	Universal Robina corp (URC)	National	PH	Broiler Layer Hog	Robina farms (chilled)	AAA	Robina farms (RT)	-	200 000	12 600	0,8%
5.	Biotech farm	National	PH	Hog Layer	-	Building AAA	-	-	200 000	12 600	0,8%
6.	Bounty agro venture (BAVI)	National	PH	Broiler Hog	Bounty Fresh (chilled)	-	Chooks to go (FS)	-	100 000	6 300	0,4%
7.	New Hope	National	CH	Hog Broiler Layer	-	Plan to build AAA	-	-	100 000	6 300	0,4%
8.	Pilmico animal nutrition	National	PH	Hog Broiler Layer	-	AA	The Good Meat (online shop)	-	80 000	5 040	0,3%

Source: Gira compilations and estimates

Others: 1) QPIGS Livestock Corporation, that started as a multiplier and is currently building its own AAA slaughterhouse in South Cotabato, Mindanao. 2) Marcela farms, located in Bohol (Visayas) has its own AA-slaughterhouse and meat cutting plant. 3) Virginia farms & Asturias farms, based in western Cebu, are now focused on the swine business, and have their own slaughterhouse and meat processing facilities.

Meat Processing Industry

- Only about 15% of total raw material requirements of the local meat processing industry is supplied domestically because of the following issues:
 - - A technical mismatch: processors require “industrial grade meat” while local livestock and poultry raisers are selling their production to wet markets as “table meat”;
 - - Costs consideration: mechanically-separated or deboned meat (used for hotdogs and sausages) and Indian buffalo meat (for corned beef) is cheaper than local meat;
 - - Support facilities gap: refrigeration requirement of processors are not met by local producers.
 - - Consistency: local production of manufacturing meat is not consistent in quality, and fat content.

Some reasons for the spread of ASF

- Swill feeding...a common practice among small-hold farmers.
- Lack of biosecurity –inability to afford measures in the backyard or small/medium commercial farms.
- Contract breeding moves diseased pigs around the market.
- Lack of safety procedures when they exist, even in large commercial farms.

Some reasons for the spread of ASF

- Insufficient government financial support to compensate the farmers' loss, generating hidden cases and 'double dead', with infected or dead pigs going into the food chain to be monetized.
- Absence of clear guidelines on how to handle the dead pigs, leading to many pigs' bodies thrown away in water contaminating underground water sources.
- Inefficient and inadequate control from the authorities at borders and quarantine checkpoints within the country

Measures taken regarding ASF

- Banning of pork imports
- Educating farmers and backyard raisers
- Zoning - DA implemented the "1-7-10" protocol in suspected areas to control suspected disease
- LGUs have applied several additional measures to control the disease – animal movement restrictions, screening, isolation, destruction of animal products, disposal of carcasses, and enforced bio-security.

Measures taken regarding ASF

- The government compensated backyard farmers who willingly culled their pigs with ₱ 3,000 per head (hogs' market value estimated at ₱ 10,000)... Later increased to ₱ 5,000 per head, but only for the first 20 head, and not counting piglets.
- To speed up the recovery of the backyard hog industry DA invested in the establishment of swine multiplier farms through clusters of 20 backyard hog farmers each; every member to be provided with five piglets each, 20 bags of animal feed, and biologics.
- BAI has also implemented an 'ASF sentinel program' to encourage commercial pig farmers to restock their farms

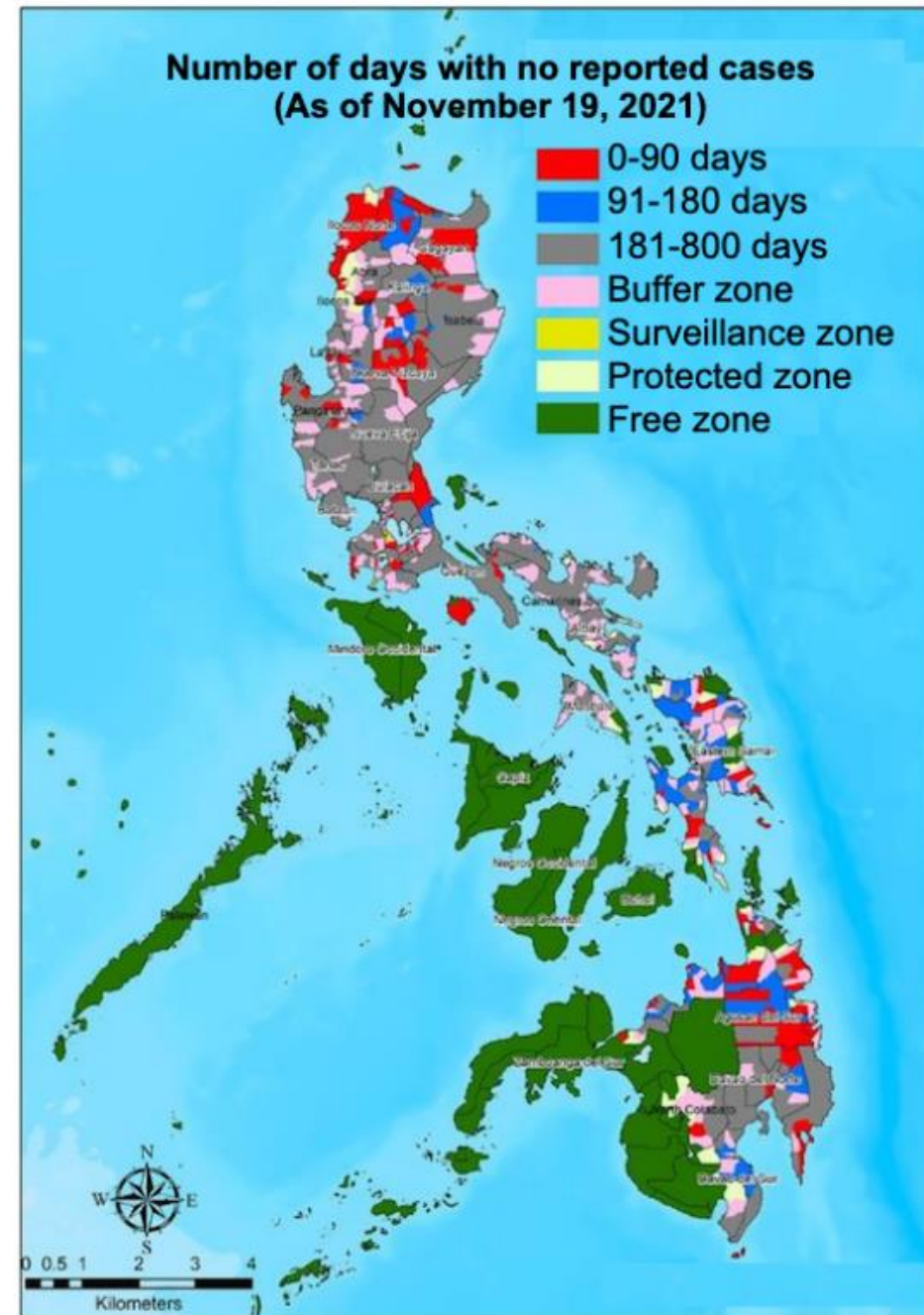
ASF zoning status as of November 19, 2021

- Infected zone
- Buffer zone
- Protected zone
- Surveillance zone
- Free zone



Number of days with no reported cases (As of November 19, 2021)

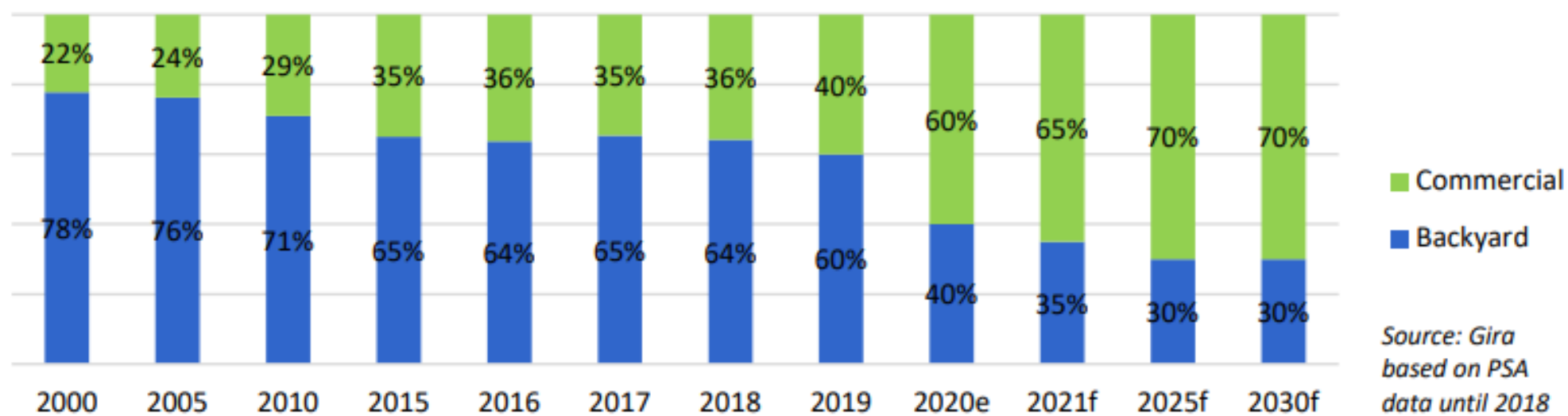
- 0-90 days
- 91-180 days
- 181-800 days
- Buffer zone
- Surveillance zone
- Protected zone
- Free zone



2025 Outlook: Pork Production

- ASF is expected to remain in the PH until a vaccine is found, and despite the low cost for backyard farmers to start again, backyard production will drop, leaving a void for commercial farms to develop into – leading to reversed market shares.
- Many small commercial farms will be closed, with some acquired by larger farms to scale up leading to further market concentration.
- Successful farms will have better biosecurity, which will reduce the impact of ASF.
- Pork production will be concentrated around Metro Manila, Regions III and IV-A– where demand is the highest.
- Pig productivity will recover, driven by the higher share of large commercial farms as well as their knowledge and financial capabilities compared to backyard farmers.
- Pork imports will increase to meet the domestic demand, facilitated by a relaxing of the current government position on imports to control retail prices.

Figure 5.4: Annual Backyard & Commercial farms Repartition, by year



2030 Outlook: Pork production

- The majority of pork production will come from large commercial farms, either contracted to or owned by slaughter groups.
- Commercial farms will integrate upstream with the feed production as well as downstream with slaughtering and meat cutting; some will even integrate to retail and foodservice.
- Domestic production efficiency will be improved: research and development in better feeds, breeding and rearing techniques, automation, and the adoption of existing technology from other more advanced markets.
- Average carcass weight will increase, driven by uptake of modern genetics, and large farms.

2030 Outlook: Pork production

- Cold chain will improved, due to private investments, to manage both imported frozen meat and increased slaughtering in AAA plants.
- Pork branding will become the norm, as it is for chicken.
- Imports will remain high due to lower prices, improved cold chain and consumers' new habit to manage/store/eat frozen meat.
- The backyard will not recover, although small parts will remain due to the geographic challenges of the Philippines.

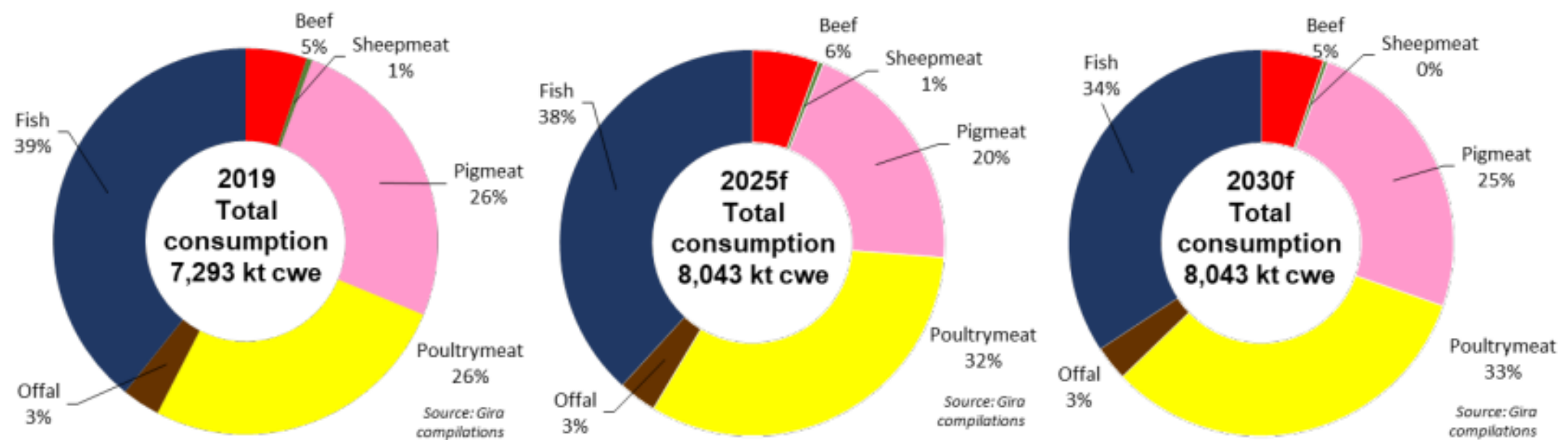
On chicken

- While ASF outbreak and a pork shortage was anticipated, massive imports of chicken have been made to ensure the availability of affordable protein for the population.
- The low price of chicken combined with the high price of pork accelerated increased consumption of chicken over pork. The market share of chicken will increase in the short term and will subside in the long term as pork production recovers, and prices fall, but by 2030 chicken will have higher market share (~33% to pork's 25%) than in 2019 at the expense of pork.

On chicken

- The price of whole chicken reached P190 to P200 per kilo as consumers eating more chicken as a source of protein vs pork. Before pork prices spiked, the chicken industry faced problems with oversupply, as demand went down due to hotels and restaurant closures. After the oversupply in 2020, the industry held back supply, causing the rise in prices.
- Some broiler producers shifted to layers to produce eggs instead of chicken meat...eggs cannot be imported and is easy to cook, no need for “recado”, further reducing the supply of chicken meat.

Figure 5.17: Protein basket market share 2019, 2025f, 2030f



Livestock feeds

- Animal feeds account for 60 to 70 percent of the cost of producing meat while yellow corn accounts for 60 percent of the cost of producing animal feeds, the reduction in the corn tariff to 5 percent helped bring down the cost of producing meats and market prices.
- According to PAFMI, yellow corn demand for feed milling was about 9 million MT with local corn production about 5 million MT, a local supply sufficiency of 57 percent, with supply gap being addressed through importation.

Livestock feeds

- While feed wheat is commonly used and imported as an alternative to yellow corn due to its more competitive price, yellow corn is still the preferred feed input, especially for poultry, given its inherent benefits over feed wheat.
- Based on a 2019 to 2021 Bureau of Customs data, the Philippines on average had imported 49 percent of its feed wheat from the Black Sea region, with 51 percent coming from Ukraine and 17 percent from Russia. Thus, a need to further diversify feed input sourcing and lower the tariff on non-Asean yellow corn.

The corn industry

- The corn industry is the only major supplier to feed millers. The other major feed ingredients are basically imported and small amounts are locally produced and are obtained from varied sources mostly in the form of by-products from among small producers.
- Yellow corn accounts for about 70 percent of local feed requirements. The availability and affordability of this input has a great impact on feed millers' operations.

The corn industry

- Corn production in the Philippines is undertaken mostly by small farmers numbering more than a million with an average size of 1.7 hectares. It represents around 20% of our arable land and more than 20% of our agricultural labor force. The bulk of production is concentrated in five regions namely:

Cagayan Valley = 22%

Central Mindanao = 16%

Southern Mindanao = 15%

ARMM = 15%

Northern Mindanao = 12%

The rest are scattered in different parts of the country like Ilocos Region, Central Luzon and Central Visayas.

PHILIPPINE DAIRY UPDATE

Particulars	2015	2016	2017	2018	2019	2020
1. Supply Situation						
(Quantity - in LME - '000 MT)						
Local Production	20.39	21.16	22.76	23.69	24.38	26.71
Imports	1,793.29	2,772.57	2,486.29	2,939.60	2,969.83	2,936.14
Gross Supply	1,813.68	2,793.73	2,509.05	2,963.29	2,994.21	2,962.85
Exports	168.32	211.58	52.34	61.27	65.85	35.81
Net Supply	1,645.36	2,582.15	2,456.71	2,902.02	2,928.36	2,927.04
2. Value of Imports - CIF						
(US \$, mil.)	694.51	807.72	903.10	987.88	1,129.32	1,082.15
(Pesos, mil)	31,600.21	38,358.62	45,516.24	52,021.76	58,498.78	53,696.28
3. Value of Exports - FOB						
(US\$, mil.)	85.79	91.98	25.16	27.30	33.18	25.33
(Pesos, mil)	3,903.45	4,368.13	1,268.06	1,437.62	1,718.47	1,257.01
4. Value of Production						
(Pesos,mil.)	653.30	715.28	809.33	937.00	1,023.00	1,207.00

Imports		Local Production	
The major country suppliers and value share for 2020 were:		Estimated share in domestic production for 2020*	
United States of America, 31%		Cow's milk, 64%	
New Zealand, 30%		Carabao's milk, 31%	
Australia, 5.15%		Goat's milk, 5%	
Netherlands, 5.13%			
Powdered milk accounts for 79% of the imports			
		Production comes from an estimated dairy animals of 26,142*	
2020 major industry players are:		Dams/Does	
More than tenwty (20) commercial processors/importers *		Cattle	10,557
More than one hundred (100) importers/traders *		Carabao	5,228
More than nine hundred (900) NDA-assisted/monitored dairy producers*		Goat	10,357

Supply volume (Imports/Exports/Prodn)-computed in milk
equivalent using TMS factor/method

* - preliminary

Basic Source: Phil. Statistics Authority
Gathered and processed by NDA-PMSED
NDA-PMSD3/30/2021

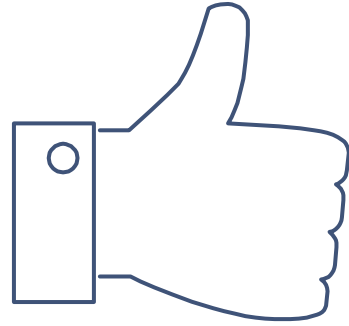
Table 3.3 Livestock and Poultry: Inventory by Type, Philippines,
as of January 1, 2016-2021

Item	2016	2017	2018	2019	2020	2021
Livestock ('000 heads)						
Carabao	2,877	2,882	2,883	2,874	2,866	2,849
<i>Dairy</i>	18	19	19	19	19	19
Cattle	2,554	2,548	2,554	2,535	2,542	2,605
<i>Dairy</i>	25	26	26	26	26	27
Swine	12,479	12,428	12,604	12,709	12,796	9,943
Goat	3,663	3,710	3,725	3,756	3,813	3,868
<i>Dairy</i>	2.1	2.4	2.6	2.6	2.7	2.8
Poultry ('000 birds)						
Chicken	178,793	175,317	175,772	186,370	178,265	176,820
<i>Broiler</i>	65,713	62,444	59,903	64,217	56,387	53,887
<i>Layer</i>	32,227	34,474	35,569	38,811	41,202	42,888
<i>Native/Improved</i>	80,853	78,399	80,300	83,342	80,676	80,045
Duck	10,519	10,842	11,220	11,577	11,794	12,512

Source: PSA

Towards developing the Livestock Industry

- For Hogs, repopulation and solving the problem of ASF and other livestock and poultry diseases
- For chicken (and also livestock)....develop the corn industry through the provision of post harvest facilities (drier & warehousing)
- Providing incentives to investments and easy access to credit
- Improve cold chain and logistics...the whole supply chain
- Farm consolidation and mechanization
- For Dairy, undertake herd build-up and technical intervention for greater productivity
- Sustain the milk feeding program to develop the dairy industry



THANKS!