

VIETNAM LIVESTOCK PRODUCTION OVERVIEW

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ABSTRACT

Over the past few years, the livestock sector has grown to become an important industry, supplying the market with high nutritional value products (meat, milk, and eggs), bringing Vietnam out from food shortages. This has provided sufficient and surplus for domestic consumption; some products have been exported. In the livestock sector, in the period 2011-2015, the number of livestock farms in the form of farms, industry is growing strongly. The pig production was gradually developed, increasing both the size of the pig population and the production of hogs. In 2008, the total number of pigs was 26.7 million heads, to 27.06 million in 2011, to 29.07 million in 2016. The productivity and technology of raising pigs in the farm are similar with other countries in the region. Beside pig production, poultry production also play an important role, with poultry meat accounting for 16.6% (2011), increased to 19.06% (2016) in total domestic meat production. By 2016, total poultry production was increased to 361, 7 million (76.6% of chickens). Beef and buffalo production have not much change during the period of 2008-2016, especially dairy cattle have higher growth rate (the average growth rate reached 12.8% per year). Total milk production has increased from 262.2 thousand tons in 2008 to 795.1 thousand tons in 2016 with an average growth rate of nearly 14.9% per year. At present, there are 218 animal feed factories with total designed capacity of over 31 million tons, higher than the industrial production demand in 2020 (25 million tons). Vietnam is the country with the strongest growth in Asia, and have highest volume of feed production in Southeast Asia. This amount of feed has basically met the demand of animal feed industry in the country and is initially aimed at exporting to some markets in the region. In coming year, the livestock production development plan was oriented towards restructuring and will have more success.

INTRODUCTION

After the Prime Minister approved the Decision No. 10/2008 / QD-TTg dated 16/01/2008 on the promulgation of Livestock Development Strategy to 2020 (referred to as the Strategy)¹, The provinces have developed the livestock contents in line with the strategy, thereby promoting the growth of the sector, in the period 2006-2010, the livestock sector has maintained an average annual growth rate of 6.0-7.0%. Livestock production in agriculture (cultivation, livestock, services) reached 27-28%; In the next period from 2011 to 2015, the livestock sector have

maintained an average growth rate of 4.5-5.0% / year, the proportion of animal husbandry in agriculture (cultivation, livestock, services) reaching 30.5% in 2015, increasing to 32% in 2016, contributing to maintain the growth rate of agriculture.

SITUATION OF LIVESTOCK FARM DEVELOPMENT

In 2011, there were 15.35 million households in the country, and had 10.36 million were engaged in agriculture, forestry and fisheries; of which 9.58 million are in agriculture. In recent years, due to the complicated situation of diseases, access to credit by local people has been very difficult, the prices of raw materials and animal products in the market are high are the reason farmers have to put empty cages or re-playing slowly (estimated at present, there are about 6.0-6.5 million households in the country).

At present, animal husbandry is shifting rapidly from small scale to industrial production, playing an important role in the modernization of animal husbandry. In recent years, animal husbandry has been formed in the closed product value chain from farm to fork, especially in the two big cities as Hanoi and Ho Chi Minh City and the vicinities supplying food to these two cities such as CP, Dofico, Dabaco, Japfa Comfeed, Vissan, TH, and Vinamilk ... and forming large-scale industrial farming.

In 2010, there were 23,558 breeding farms/145,880 farms in the agricultural sector; by 2011 the number of farms in general and the livestock sector in particular decreased sharply caused by the Ministry of Agriculture and Rural Development issued Circular No.27/2011/TT-BNNPTNT dated 13/4/2011 stipulating the Criteria and procedures for granting farm economy certificates, many farms fail to meet the criteria or have not yet been cleared for certification. In the livestock sector, in the period 2011-2015, the number of livestock farms with industry farm scale is growing strongly. In 2011, the total number of livestock farms was 6,267/ 20,078 farms in the country; By 2015, livestock farms will reach 15,068/29,389 farms (accounting for 51.27% of total farm production), 2.4 times higher than that of 2011; currently, according to GSO², the total number of livestock farms is 20,869 (accounting for 62.32% of the 33,488 farms in the country)

PIG PRODUCTION

In the period 2011-2015³, pig production was gradually developed, increasing both the size of the pig population and the production of hogs. In 2008, the total number of pigs was 26.7 million heads, to 27.06 million in 2011, to 29.07 million in 2016.

Distribution of pig herds by region is as follows: Red River Delta is 25.74%, Northern Midlands and Mountains is 24.1%, South East is 10.51%, and Central Highlands is 6.58% (2015).

The production of hogs has increased over the years. Specifically, in 2008 the total production was only 2.8 million tons, and in 2011 reached 3.1 million tons (accounting for 78.02% of total production). In the period 2011-2015, pork production is on average growing at 2.12% per annum and by 2016 it will reach a record level of 3.66 million tons (accounting for 72.63% of total production). The

average live - weight at slaughter was 67.7 kg/head (in 2011) up to 68.52 kg / head in 2015 and 71.7 kg / head in 2016.

The productivity and technology of raising pigs in the farm are similar with other countries in the region. The efficiency of raising pigs is stable, bringing stable income for the farmers and creating jobs for the rural areas. The application of science in raising pigs on breeding facilities, animal waste treatment, and environmental sanitation has been widely applied. Using multiple genomes has yielding, high quality.

However, pig production still have the shortcomings: proportion from smallholder still accounts for 65.0-70% of the pig population and 56.0-60% of the output; the sow rate is 14.57% (2016) while the world average is 8-10%; The quality of the breed has improved, but it has not met the requirements of production (especially the farm animal husbandry). Many local breeds have not been kept and preserved; the environmental pollution in pig farming has not been overcome.

POULTRY PRODUCTION

Poultry husbandry holds an important place in contributing to the production value of the livestock sector. Avian influenza outbreaks in the first stage of 2011-2015, especially in 2012, reduced the number of poultry to 308.5 million compared with 322.6 million in 2011. However, in the following years, the poultry have returned to the trend of development and relatively good increase in output. Total poultry production in 2008 was 248.3 million, up to 322.6 million in 2011, of which chicken accounted for 72.1% of the total population. By 2016, total poultry production increased to 361, 7 million (76.6% of chickens).

Poultry meat production increased from 448.2 thousand tons in 2008 to 696.0 thousand tons in 2011 and 2016 reached 961.6 thousand tons. An average growth rate reached 4.8% per year. If avian influenza had a good control and no strong re-emergence at the same time when the restructuring plan is implemented extensively in the provinces / cities across the country, the growth rate of poultry in the period 2016-2020⁴ is forecasted continue to increase.

Eggs production in 2008 reached 4.97 billion and in 2011 were nearly 6.9 billion eggs, by 2016 increased to 9.45 billion eggs; reaching an average growth rate of 8.3% / year.

Beside pig production, poultry production also play an important role, with poultry meat accounting for 16.6% (2011), increased to 19.06% (2016) in total domestic meat production. Productivity and technology of poultry production have reached the standard in Southeast Asia and it has emerged many corporative and companies in poultry farming. However, poultry production is still predominantly on a small scale. The traditional breeding system with indigenous poultry breeds has not been properly considered. Overall, the ability to control disease and the environment is weak; the poultry market is highly volatile; slaughtering and processing of industrial poultry is still weak and facing many difficulties; The habit of consuming live poultry, trading, manual slaughter is one of the causes of the spread of disease.

BUFFALO AND CATTLE PRODUCTION

Buffalo population in the period 2011-2020 has the downward trend: the number of decreases is over 185,000 heads from 2008 to 2011 (2.89 million and 2.71 million respectively). As the problem of mechanization increases in rural areas, the number of buffalos was decreased by 1.92% on average in 2011-2015; by 2016, the total buffalo population was 2.52 million. Buffalo meat production in 2008 reached 71.5 thousand tons increased to 87.8 thousand tons in 2011 and by 2016 it decreased to 86.6 thousand tons.

The number of beef cattle in the country decreased 1.76% per year in the period 2008-2016⁵, from 6.33 million to 5.49 million. However, beef production increased by 3.93% per year, from 226.7 thousand tons in 2008 to 306.8 thousand tons in 2016. Cattle production is most favored by localities, breeding programs and extension programs devoted much of their resources to Zebu cow and grass planting, rendering by-products, fattening of beef cattle with high yield, high meat yield. The local breed of cattle now accounts for 56% of the population with low yield. The group of zebu breeds accounted for 34% of the total volume with higher growth rate, better climate conditions adaptation and more suitable with semi-grazing livestock production in Vietnam. Over 90% dispersed in the households, the old habits to breed the cattle with high inbreeding percentage. Many local policies on encouraging the development of beef cattle, local budgets support: artificial insemination of cattle, buying breeding animals, grass species, interest rate support for banks ... to quickly increase the percentage of crossbred cattle in the area.

The number of dairy cows in the country in 2008 was 108.0 thousand, in 2011 reached 142.7 and increased to 283.0 thousand in 2016, the average growth rate reached 12.8% per year. Total milk production has increased from 262.2 thousand tons in 2008 to 795.1 thousand tons in 2016 with an average growth rate of nearly 14.9% per year.

ANIMAL FEED

In the 2005-2015⁶ period, the national management of the animal feed sector has been strengthened; at present, the system of legal documents has basically been completed and meets the requirements of management of production practice; domestic and foreign enterprises are stepping up investment in expanding production and supplying diverse markets for animal feed, poultry and livestock. Recently, the government has reduced basic taxes on feed and allowed the free importation of all kinds of feed ingredients that domestic demand has not met, but the price of feed is still high.

The Ministry of Agriculture and Rural Development has required the localities to implement the tasks of quality control, food hygiene and safety in feeds at feed production and trading establishments and on the farms. The feed manufacturers directly to set up quality management systems to ensure the quality and safety of animal feed; encourage the application of quality management systems in accordance with ISO, HACCP, GMP or equivalent quality management system.

Vietnam is the country with the strongest growth in Asia, and have highest volumn of feed production in Southeast Asia.

At present, there are 218 animal feed factories with total designed capacity of over 31 million tons, higher than the industrial production demand in 2020 (25 million tons).

The total volume of animal feeds production increased from 8.8 million tons in 2008 to 11.8 million tons in 2011 and reached 20.15 million tons in 2016. With annual growth rate 2005-2010 is nearly 20% and in the period 2011-2015 is nearly 9.5%. This amount of feed has basically met the demand of animal feed industry in the country and is initially aimed at exporting to some markets in the region. Feed conversion ratio per kg of pig liveweight gain decreased from 3.06 kg to 2.77 kg, for poultry averaged 2.84 kg reduced to 2.72 kg.

In the period 2011-2015, Viet Nam has provided most of its energy resources to the livestock feed sector: 100% of cassava, paddy and rice; 80% corn, and rice bran... However, this amount has not met the demand of the animal feed industry is increasing, so still have to import a significant amount of raw materials.

LIVESTOCK DEVELOPMENT PLAN ORIENTATION TOWARDS THE LIVESTOCK RESTRUCTURING

Main duties:

- To review the structure of livestock breeds and assess the breed structure to direct the localities to select appropriate livestock breeds.
- Restructure the market of animal products, focus on export markets.
- To review and quickly unify the management of livestock breeds.
- Reorganize production, establish linkages in livestock.
- Promote the application of science and technology; Information on propaganda and training to improve the quality of human resources in the livestock sector.
- Promote the processing of animal products.

Orientation targets for 2018⁷:

- The production value of the livestock sector increase 4.1% in compare with 2017; the proportion of animal husbandry in agriculture will reach 33-34%.
- Total meat output will reach 5.4 million tons, increase 3.8%; Pork production get 3.85 million tons, higher 2.5% in compare with 2017; Egg production about 10.17 billion eggs increase 3.0%; Milk production will reach over 1 million tons, increase 11.7%; Poultry meat output reached 1,091 thousand tons, up to 7.8%; Honey production will have 21.5 thousand tons, increase by 10.3%; The output of animal feed industry reach over 20.5 million tons, higher 2.8% than production of 2017.
- The rate of cross-bred beef is estimated at 61.5% of the total cow herd; percentage of exotic sows 27.5%; percentage of crossbred pigs and exotic pigs in total pig population around 92.7%; Live-weight at slaughter will reach 77.8

kg/head.

CONCLUSION

Although facing with many difficulties, the livestock sector has made remarkable progress over the years. In the coming time, with the attention of the government and the policy development, the livestock sector will meet the domestic demand and export products to others country.

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