

PHILIPPINES



A paper presented during the seminar organized by the Taiwan Livestock Research Institute on March 27, 2019 on "Technology for Working Pathways in Animal Breeding".



CURRENT CHALLENGES OF SWINE INDUSTRY IN THE PHILIPPINES



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OUTLINE OF PRESENTATION

- I. Country Profile
- II. Overview of the Swine Industry in the Philippines
- III. Constraints and Challenges
- IV. Future Prospects



BONUS: Quick Tour to the Philippines

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I. COUNTRY PROFILE



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COUNTRY PROFILE

- Archipelago of **7, 107 islands** in the southern coast of Asia.
- Sub-divided:
 - **Luzon**
 - **Visayas**
 - **Mindanao**



- **Total Area:** 300, 000 sq. km.

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COUNTRY PROFILE

- **Climate:** Tropical with high temperatures, abundant rainfall and high relative humidity
- **Two distinct Rainfall Patterns:**
 - a) Wet or Rainy Season
 - b) Dry or Hot Season



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COUNTRY PROFILE

- **Population :** 106 million (CY 2018 est.)
- **Capital City:** Manila
- **People:** Filipinos are predominantly of Malay descent, although many have mixed ancestry, with Chinese and Spanish the largest influences.



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COUNTRY PROFILE

- **Languages:** Filipino, based on Tagalog, is the national language.

English is also an official language.

Over 150 native languages and dialects are spoken.



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COUNTRY PROFILE

- Dominant Sector : **AGRICULTURE**
- Sub-sectors: farming, fisheries, livestock, forestry
- Agricultural Area : 13 million hectares

Rice	:	32 %
Coconut	:	26 %
Corn	:	21 %
Sugarcane, Banana & Coffee	:	8 %
Root crops, Vegetables, Fruit Trees	:	13 %



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COUNTRY PROFILE

- Major producer of the following:
 - Hogs
 - Broilers
 - Eggs (Chicken, duck, quails)
 - Small & Large Ruminants
- Hog & Poultry Sub-sector: Consistent source of growth in agricultural value added (ave. 10 % annually).



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COUNTRY PROFILE

- Farm System/Structure
 - Small (ave. 2 has)
 - Medium (> 3 has.)
 - Large Farms (e.g., plantations)
- Typical Farms:
 - * Major crop
 - * Base crops : rice, corn, coconut
 - * Few heads of livestock and poultry



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COUNTRY PROFILE

- Agriculture in Philippine Economy:
 - * 70% of the population predominantly rural
 - * Two thirds (2/3) depend on farming as livelihood
 - * Employed 39.8 % of the labor force
 - * One half (1/2) of the labor force engaged in agricultural activities
 - * AF Sector contribution : 20% of the GDP with 2.6% (ave.) growth annually.



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II. OVERVIEW OF THE PHILIPPINE SWINE INDUSTRY



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Swine production in the Philippines is the largest among the livestock and poultry industries of the country.



It ranks next to rice with 18.28% contribution to the total value of agricultural production.

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The Philippine swine industry is ranked 8th in the world in terms of the volume of pork production and number of breeding sows.



Swine production plays a major role in ensuring the country's food security by providing about 60% of the total animal meat consumption of Filipinos.

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Backyard farms - less than 10 sows per household

Commercial farms, on the other hand, are classified into small, medium, and large. Small commercial farms maintain less than 100 sows and purchase commercial feeds. Medium-scale farms have 100 to 300 sows, business permits, and specialized farm structures. Some mix their own feeds. Meanwhile, large-scale farms operate more than 300 sows, own boars and breeders, and implement artificial insemination (AI).



Commercial farms

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Majority or about 65% of the pigs in the Philippines are kept by smallhold pig raisers



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the country's total swine inventory is estimated at 13.4 million heads

29 percent are raised commercially



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Top producing regions

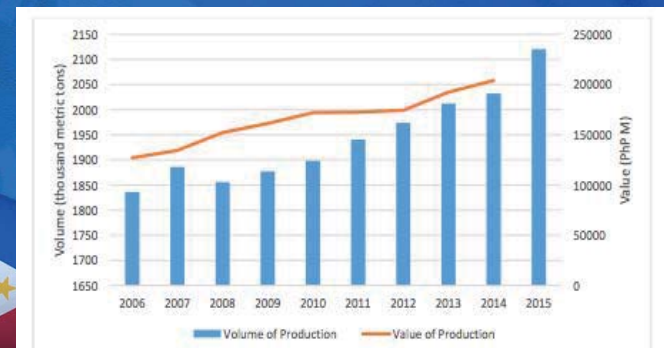
- CALABARZON (13.13%)
- Western Visayas (11.56%)
- Central Luzon (10.66%)
- Bicol Region (7.84%)
- Eastern Visayas (7.30%)



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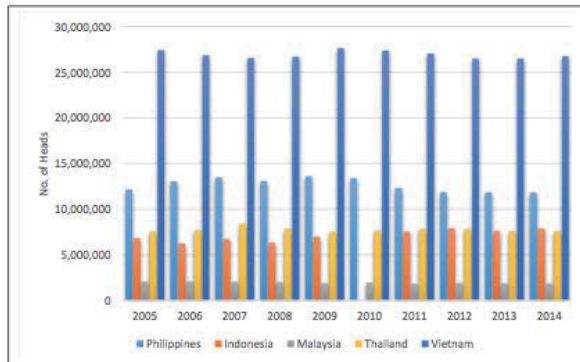
Production System



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Production



Source: FAOSTAT
Figure 10. Hog Production by Country, 2005-2014

Philippines ranked second to Vietnam in terms of hog production. Quantity produced by Vietnam was double of the Philippines' figures, and approximately triple of the Thailand and Indonesia's data. Malaysia had the smallest hog production and poorest average growth performance.



Domestic Prices

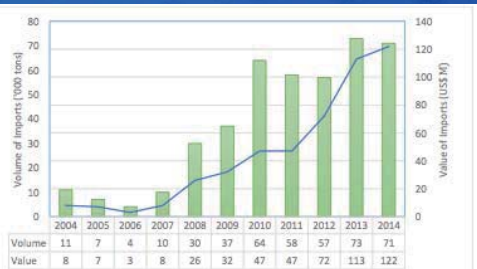


Source: DA-AMAS

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Imports



Caveat: Philippine imports of fats, skin and offal not included. Data only include meat of swine, fresh, chilled or frozen HS Code 0203.
Source: UN Trade Map

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The preference of Filipino consumers for fresh warm or chilled pork over frozen pork gives the local industry market assurance of its products.

The importation of low-priced beef, buffalo meat and poultry meat may create a shift in consumption from pork to these cheaper alternatives.

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Supply

Table 3. Swine Supply and Disposition in the Philippines, 2015 (number of live animals, unless otherwise stated)

PARTICULAR	2015P Jan-Jun
Total Supply	25,522,034
Beginning Inventory ^{1/}	11,999,722 ^{1/}
Born live	13,522,312
Imports ^{2/}	-
Disposition	13,252,915
Slaughtered	12,427,001
Deaths/Losses ^{3/}	825,914
Ending Inventory	12,269,119 ^{4/}

P-Preliminary

^{1/} As of January 1

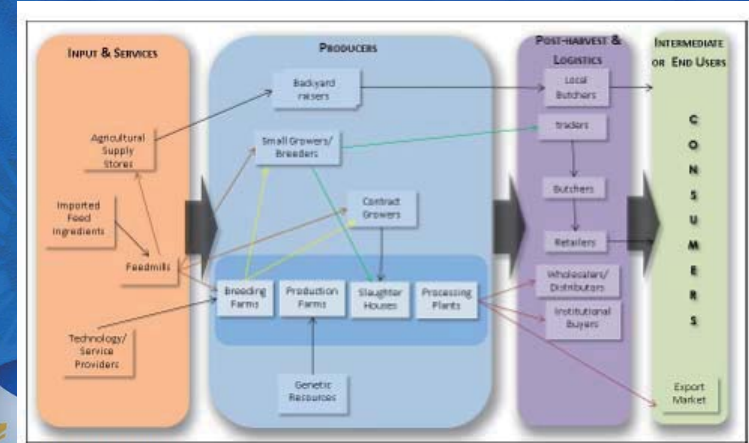
^{2/} No recorded imports from January to June 2015

^{3/} Mortality due to pests and diseases

^{4/} As of July 1

Source: PSA's Swine Industry Performance Report (January-June 2015)

Supply-Value Chain



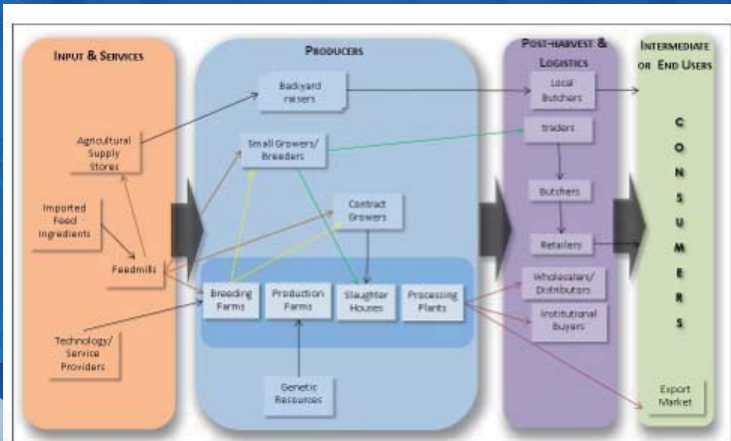
Source: MADECOR

Figure 15. Supply Chain of the Philippine Hog Industry

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Supply-Value Chain



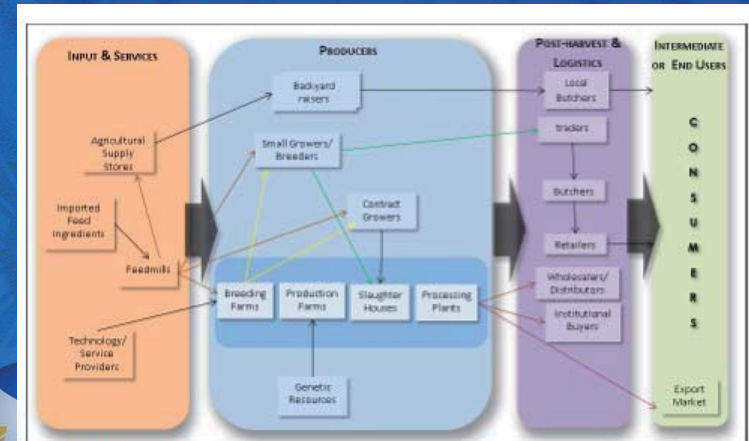
Source: MADECOR

Figure 15. Supply Chain of the Philippine Hog Industry

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Supply-Value Chain



Source: MADECOR

Figure 15. Supply Chain of the Philippine Hog Industry

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The local swine industry needs to be modernized to ensure that it can withstand any form of competition

To enhance its global competitiveness, the government should work with the private sector in providing the livestock sector with policy reforms on importation, trade, pricing of inputs and support in terms of technology and infrastructure.



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III. CONSTRAINTS AND CHALLENGES



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Despite being dynamic and technologically advanced, the local pig industry is still confronted with:

- inefficiency of production due to low sow productivity
- high mortality due to inefficient diagnostic tool
- lack of native pig genetic resource conservation
- improvement and utilization initiative



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

The program aims to address the current problems by developing technologies and systems that are expected to improve the productivity and production efficiency.

Through these initiatives, the program seeks to create new opportunities and increase the overall competitiveness of the Philippine swine industry.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Production System

Pig rearing practices in the country need a lot of improvement considering that about 70% of pigs are on a backyard level.

The infection pressure is high as biosecurity is compromised in a mostly one-site system where re-circulation and spread of pathogens is great.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Production System

Bigger operations, however, are now tunnel ventilated and multi-site and able to implementing an all-in all-out system.

Automation has also been established in many commercial and integrated farms.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Biosecurity

Isolation pens for sick pigs or incoming pigs are mostly not available even in some commercial operations.

Standard protocols and quarantine period for newly purchased animals are not properly implemented.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Genetics

Majority of the backyard raisers select their replacements from the production of their terminally crossed breeders.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Feeding

The most common feeding strategy for many farmers is the 2-3 times daily feeding of the usual corresponding ration from booster to lactating.

Backyard farmers, however, provide the cheaper brood sow ration, a diet given to all breeders whether, dry, pregnant, nursing or boars. Swill or left over feed, even if cooked, is no longer popular even among backyard raisers unless a link to eateries or restaurants has been instituted.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Animal Health

The pig production system mostly seen in the country predisposes the farm to a high disease challenge.

The non-referral to regular diagnostic procedures creates confusion in coming up with a sound medication and vaccination program.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Animal Health

Vaccination in most farms is established by convenience and hearsay or just by following recommendations of favorite suppliers.

Antibiotics, particularly in-feed products, are added routinely without a regular sensitivity test.



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Marketing

Of the 30% commercial farm sector, only a few are fully integrated.

Pigs are usually sold through a middleman also known as "Viajeros".



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CONSTRAINTS and CHALLENGES of Philippine's Swine Industry

Marketing

They bring the pigs to the slaughterhouses and distribute the carcasses to the wet markets.

High cost of feeds and diseases created a shortage and the price of pork soared high.



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IV. STRATEGIES AND POLICIES



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ACTION PROGRAMS, KEY RESULTS AREAS (KRAs) FOR THE HOG INDUSTRY

KRA 1: Increased farm productivity

KRA 2: Reduced cost of inputs

KRA 3: Modernized and restructured post-production system

KRA 4: Increased access to information and extension services of the smallhold farmers

KRA 5: Adopted food safety regulations and standards

KRA 6: Improved animal health status

**KRA 7: Established registry of market players
(i.e. meat inspectors, butchers, among others)**



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IT'S MORE FUN IN THE PHILIPPINES: A QUICK TOUR



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ISLAND: LUZON

Subterranean River/Underground River, Palawan (8 Wonders of the World)



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ISLAND: LUZON

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ISLAND: LUZON

Banaue Rice Terraces, Ifugao



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ISLAND: LUZON

Bangui Wind Mills, Ilocos Norte



Mayon Volcano, Albay

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ISLAND: LUZON



Coron Island, Palawan



El Nido, Palawan



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ISLAND: VISAYAS

Boracay Island, Aklan



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ISLAND: VISAYAS

Chocolate Hills, Bohol



Tarsier

Loboc River, Bohol

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ISLAND: MINDANAO



Sunken Cemetery, Camiguin

Ma. Cristina Falls, Lanao del Norte



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ISLAND: MINDANAO



Siargao Island, Surigao del Norte

"Surfing Capital"



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ISLAND: MINDANAO



Cagayan de Oro



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ISLAND: MINDANAO



Lake Sebu,
South Cotabato



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MARAMING SALAMAT

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MABUHAY!!!

(Thank you very much and Long Live!!!)



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