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”.

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

CURRENT CHALLENGES OF SWINE INDUSTRY IN THE PHILIPPINES

Dr. Gerry Pagarigan*
Ms. Mary Ann A. Ramos**

*Agriculturist II and Focal Person for the National Livestock Program, ATI-RTC XII
**Training Specialist III and Focal Person for the National Livestock Program, ATI-RTC VI

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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

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.
COUNTRY PROFILE

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

<table>
<thead>
<tr>
<th>Crop</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rice</td>
<td>32 %</td>
</tr>
<tr>
<td>Coconut</td>
<td>26 %</td>
</tr>
<tr>
<td>Corn</td>
<td>21 %</td>
</tr>
<tr>
<td>Sugarcane, Banana &amp; Coffee</td>
<td>8 %</td>
</tr>
<tr>
<td>Root crops, Vegetables, Fruit Trees</td>
<td>13 %</td>
</tr>
</tbody>
</table>

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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).

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

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.
II. OVERVIEW OF THE PHILIPPINE SWINE INDUSTRY

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.

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

The country's total swine inventory is estimated at 13.4 million heads, 29 percent are raised commercially.

Top producing regions:
- CALABARZON (13.13%)
- Western Visayas (11.56%)
- Central Luzon (10.66%)
- Bicol Region (7.84%)
- Eastern Visayas (7.30%)
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.

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

<table>
<thead>
<tr>
<th>PARTICULAR</th>
<th>2015P Jan-Jun</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Supply</td>
<td>25,522,934</td>
</tr>
<tr>
<td>Beginning Inventory</td>
<td>11,999,722 1/</td>
</tr>
<tr>
<td>Born live</td>
<td>13,523,312</td>
</tr>
<tr>
<td>Imports 2/</td>
<td>13,252,915</td>
</tr>
<tr>
<td>Slaughtered</td>
<td>12,427,001</td>
</tr>
<tr>
<td>Deaths/Change 3/</td>
<td>825,914</td>
</tr>
<tr>
<td>Ending inventory</td>
<td>12,269,119 2/</td>
</tr>
</tbody>
</table>

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)
The local swine industry needs to 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.

III. CONSTRAINTS AND CHALLENGES

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

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

**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.

**Genetics**

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

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.

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”.

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.
CONTRAITS 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.

IV. STRATEGIES AND POLICIES

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)

REFERENCES

Road Map for the Philippine Hog Industry
https://www.nap.edu/read/19000/chapter/3
IT'S MORE FUN IN THE PHILIPPINES: A QUICK TOUR

ISLAND: LUZON
Subterranean River/Underground River, Palawan (8 Wonders of the World)
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ISLAND: MINDANAO

Siargao Island, Surigao del Norte
“Surfing Capital”

Cagayan de Oro

Lake Sebu, South Cotabato

MARAIMING SALAMAT
AT
MABUHAY!!!
(Thank you very much and Long Live!!!)

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