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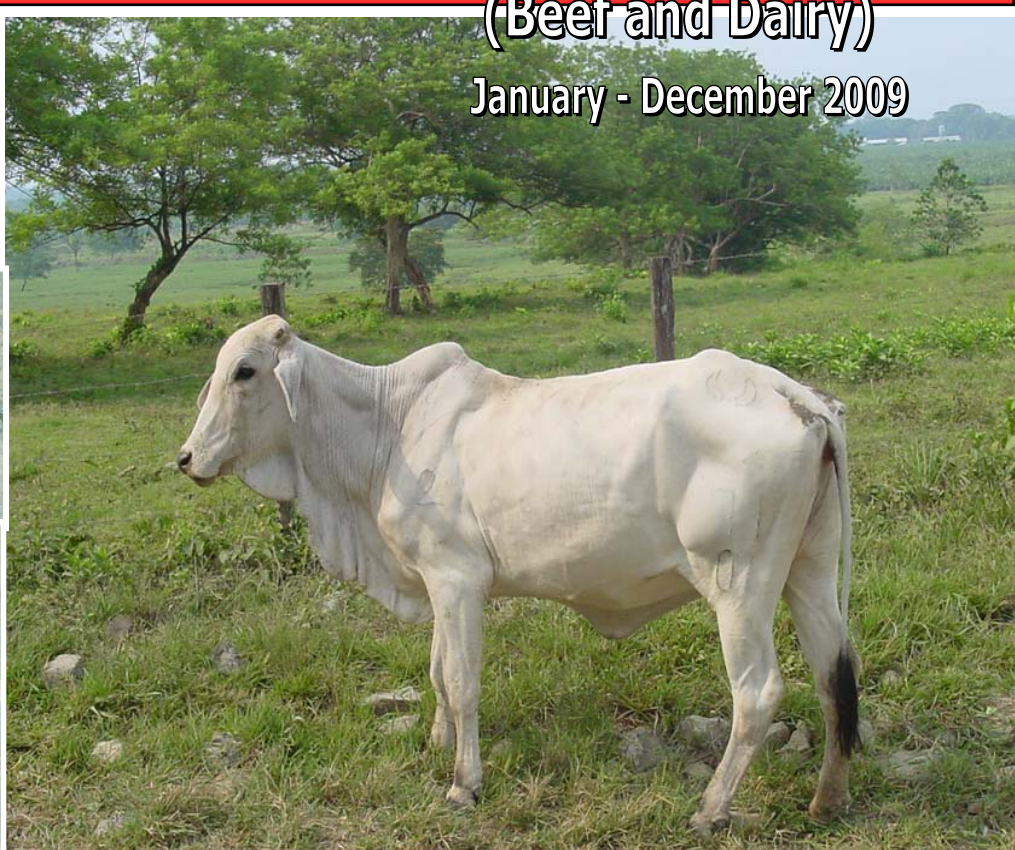


Republic of the Philippines
Department of Agriculture
BUREAU OF AGRICULTURAL STATISTICS
Quezon City

CATTLE INDUSTRY PERFORMANCE REPORT

(Beef and Dairy)

January - December 2009



May 2010



EXPLANATORY NOTES

The Cattle Industry Performance Report presents the industry situation in terms of inventory by farm type and age classification; volume of production; animals on the milk line and milk production; supply and disposition; supply and utilization accounts; and monthly average prices at farmgate, wholesale and retail levels.

The Livestock and Poultry data system of the Bureau of Agricultural Statistics (BAS) is supported by two (2) major surveys namely:

- 1) The Backyard Livestock and Poultry Survey (BLPS) which covers one (1) of the four (4) replicate samples of the Palay and Corn Production Survey (PCPS) consisting of 9700 sample households in 673 sample barangays nationwide.

- 2) The Commercial Livestock and Poultry Survey (CLPS) which covers around 685 independent farms based on the January 2010 updated list. A cattle farm is considered commercial when it has a farm capacity of at least 21 head of adult cattle.

Both surveys for cattle are simultaneously conducted every January and July in all provinces.

Another survey that supports the statistical requirements of the livestock and poultry sector is the Survey of Animals Slaughtered in Abattoirs. This covers around 1,120 accredited and non-accredited abattoirs nationwide. This is undertaken in coordination with the National Meat Inspection Service (NMIS).

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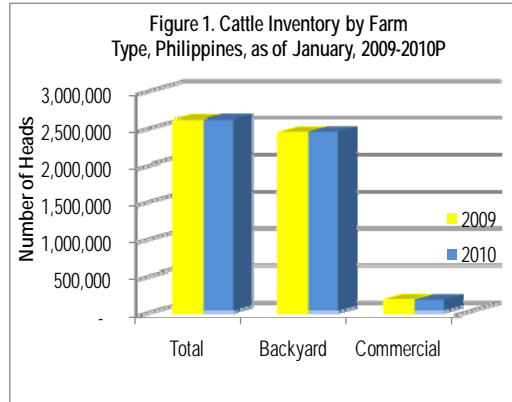
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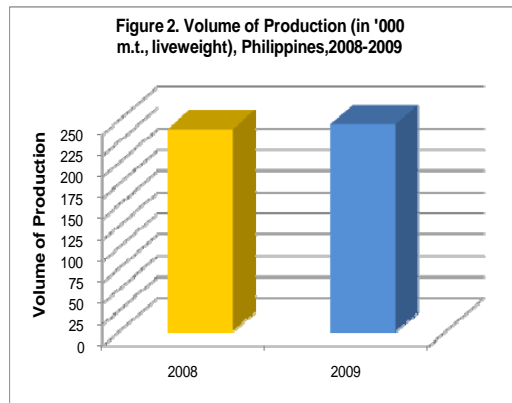


HIGHLIGHTS

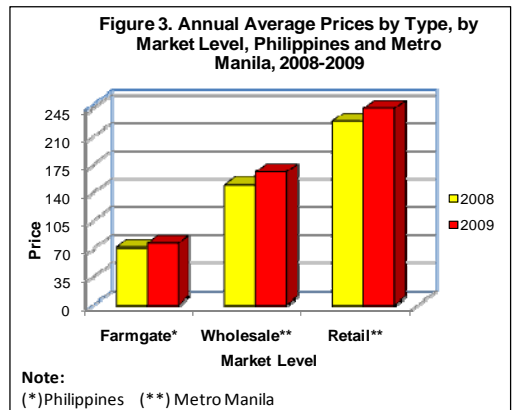
❖ The total cattle inventory in the country as of January 1, 2010 was estimated at 2.596 million head, or 0.37 percent higher than last year's headcount of 2.586 million head. Compared to last year's levels, inventory of cattle from backyard farms grew by 0.44 percent, while inventory from commercial raisers declined by 0.67 percent. Around 94 percent of the total cattle inventory were raised in backyard farms and only 6 percent were raised in commercial farms.



❖ In 2009, total cattle production was estimated at 245.10 thousand metric tons. This was 2.49 percent higher than the previous year's production of 239.16 thousand metric tons.



❖ The annual average farmgate price of live cattle in 2009 was P76.23 per kilogram. It registered a 6.66 percent hike from previous year's price. At the wholesale level, the annual average price was P165.44 per kilogram or 10.49 percent higher than last year's P149.73 per kilogram. The 2009 average retail price at P244.18 per kilogram went up by 6.69 percent from the 2008 level.





INVENTORY

Table 1. Cattle Inventory by Farm Type and by Age Classification, Philippines, January 1, 2008-2010 (Number of Head)

ITEM	2008	2009	2010	Percent Change	
				09/08	10/09
TOTAL	2,566,492	2,586,386	2,596,031	0.78	0.37
BACKYARD	2,408,733	2,421,725	2,432,475	0.54	0.44
COMMERCIAL	157,759	164,661	163,556	4.38	(0.67)
COW	990,227	1,054,625	1,070,333	6.50	1.49
Backyard	925,410	987,198	1,002,774	6.68	1.58
Commercial	64,817	67,427	67,559	4.03	0.20
HEIFER	444,399	438,447	445,112	(1.34)	1.52
Backyard	408,122	400,118	406,969	(1.96)	1.71
Commercial	36,277	38,329	38,143	5.66	(0.49)
YEARLING^{1/}	506,957	496,623	473,597	(2.04)	(4.64)
Backyard	480,144	468,602	446,644	(2.40)	(4.69)
Commercial	26,813	28,021	26,953	4.50	(3.81)
BULLS	303,105	297,085	303,546	(1.99)	2.17
Backyard	290,487	283,415	290,022	(2.43)	2.33
Commercial	12,618	13,670	13,524	8.34	(1.07)
OTHERS^{2/}	321,805	299,606	303,443	(6.90)	1.28
Backyard	304,570	282,392	286,066	(7.28)	1.30
Commercial	17,234	17,214	17,377	(0.12)	0.95

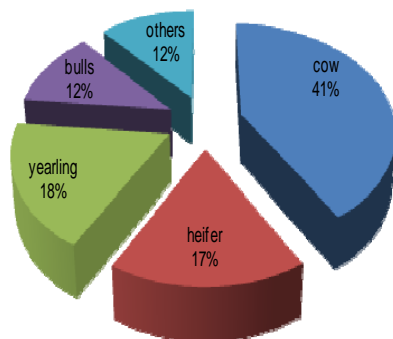
P-Preliminary Estimates

^{1/} Male and female, 1 year old and below including calves

^{2/} Include castrated male and ready to breed bull

- ❖ Total cattle inventory as of January 1, 2010 was estimated at 2,596,031 head, or 0.37 percent higher than last year's inventory.
- ❖ Of the total cattle population, cow accounted for about 41 percent. Yearling contributed 18 percent, heifer 17 percent, bull and other age classifications 12 percent, to the cattle population.

Figure 4. Distribution of Inventory by Age Classification, Philippines, as of January 1, 2010





**Table 1a. Inventory of Dairy Cattle by Age, Philippines,
as of January 1, 2007–2010
(Number of Head)**

ANIMAL TYPE/AGE	2007	2008	2009	2010P	Percent Change	
					09/08	10/09
CATTLE	12,094	13,864	15,073	16,948	8.72	12.44
Bull	570	582	596	615	2.41	3.19
Dam	5,425	6,371	6,871	7,583	7.85	10.36
Heifer	1,389	1,621	1,879	2,231	15.92	18.73
Yearling	1,789	2,279	2,599	3,041	14.04	17.01
Calf	2,921	3,011	3,128	3,478	3.89	11.19

P-Preliminary Estimates

**Table 2. Cattle Inventory of Top Producing Regions, Philippines,
as of January 1, 2010P
(No. of Head)**

Region	Total	Backyard	Commercial
Philippines	2,596,031	2,432,475	163,556
Ilocos Region	345,273	341,669	3,604
Northern Mindanao	281,063	252,360	28,703
Central Visayas	275,207	273,439	1,768
CALABARZON	257,606	252,217	5,389
Western Visayas	222,935	221,318	1,617
Sub-Total	1,382,084	1,341,003	41,081
Others	1,213,947	1,091,472	122,475
Percent share			
Philippines	100.00	100.00	100.00
Ilocos Region	13.30	14.05	2.20
Northern Mindanao	10.83	10.37	17.55
Central Visayas	10.60	11.24	1.08
CALABARZON	9.92	10.37	3.29
Western Visayas	8.59	9.10	0.99
Sub-Total	53.24	55.13	25.12
Others	46.76	44.87	74.88

P-Preliminary Estimates

Inventory of Dairy Cattle

- ❖ The total inventory of dairy cattle as of January 1, 2010 was estimated at 16,948 head, 12.44 percent higher compared to last year's headcount of 15,073 head.
- ❖ Of the total dairy cattle inventory, around 45.0 percent were dams, 21.0 percent were calves, and 18.0 percent were yearlings. The rest were heifers and bulls.

Top Producing Regions

- ❖ The top five (5) producing regions in terms of total cattle inventory were Ilocos Region, Northern Mindanao, Central Visayas, CALABARZON, and Western Visayas. Altogether, they accounted for about 53.0 percent of the total cattle inventory in the country.
- ❖ Ilocos Region contributed the biggest at 14.0 percent of the total backyard cattle population. Northern Mindanao, on the other hand, accounted for 18.0 percent of the total commercial cattle population in the country.



PRODUCTION

Table 3. Volume of Production, by Quarter, Philippines, 2007-2009
(in '000 m.t. liveweight)

QUARTER	2007	2008	2009P	Percent Change	
				2008/2007	2009/2008
TOTAL	236.87	239.16	245.10	0.96	2.49
Jan-Mar	56.38	55.79	55.97	(1.05)	0.33
Apr-Jun	58.42	59.83	61.82	2.42	3.31
Jan-Jun	114.80	115.62	117.78	0.71	1.87
Jul-Sep	55.20	55.25	56.27	0.09	1.84
Oct-Dec	66.87	68.29	71.05	2.12	4.04
Jul-Dec	122.07	123.54	127.32	1.20	3.06

P-Preliminary Estimates

- ❖ The total cattle production was estimated at 245.10 thousand metric tons in 2009. It was 2.49 percent higher than the 2008 production of 239.16 thousand metric tons.
- ❖ Increased cattle production was noted in all quarters of 2009.
- ❖ The highest increment of 4.04 percent in cattle production was observed in the 4th quarter.



MILK PRODUCTION

Table 4. Animals on the Milkline and Milk Production by Source, Philippines, 2008-2009

ANIMAL TYPE/SOURCE	2008		2009		Percent Change			
	Animals on the milkline	Production (LME* in '000 liters)	Animals on the milkline	Production (LME* in '000 liters)	08/07		2009/2008	
					Animals on the milkline	Production (LME* in '000 liters)	Animals on the milkline	Production (LME* in '000 liters)
CATTLE	4,180	8,197.20	4,268	8,645.20	7.62	8.30	2.11	5.47
Individual	1,117	1,488.12	1,180	1,668.29	25.93	29.83	5.64	12.11
Cooperative	2,385	5,039.92	2,452	5,446.71	1.62	3.61	2.81	8.07
Commercial	367	1,096.49	347	1,046.66	10.54	(1.47)	(5.45)	(4.54)
Institutional	311	572.67	289	483.54	(2.20)	28.51	(7.07)	(15.56)

Source: National Dairy Authority (NDA)

*LME- refers to Liquid Milk Equivalent (for cattle 1 liter of fresh milk= 0.98 liter LME)

- ❖ The number of cattle on the milkline in 2009 added up to 4,268 head. This was 2.11 percent higher than the 2008 level.
- ❖ The 2009 production of cow's milk was estimated at 8.65 million liters which indicated a 5.47 percent growth from last year's output of 8.20 million liters.
- ❖ The biggest contribution to milk production came from the dairy cooperatives which shared around 63 percent in the total cows' milk production. This was 8.07 percent higher than in 2008.



SUPPLY AND DISPOSITION

Table 5. Supply and Disposition, Philippines, 2007-2009

(Number of live animals)

ITEM	2007	2008	2009P	Percent Change	
				08/07	09/08
TOTAL SUPPLY	3,346,350	3,390,610	3,422,403	1.32	0.94
Beginning Inventory	2,565,849	2,566,492	2,586,386	0.03	0.78
Born Alive	762,519	814,417	821,028	6.81	0.81
Imports*	17,982	9,701	14,989	(46.05)	54.51
DISPOSITION	779,858	804,224	826,372	3.12	2.75
Slaughtered	759,430	786,398	808,334	3.55	2.79
Death/Losses	20,428	17,826	18,038	(12.74)	1.19
ENDING INVENTORY	2,566,492	2,586,386	2,596,031	0.78	0.37

P-Preliminary Estimates

* Source : Bureau of Animal Industry

- ❖ The total supply of cattle in 2009 was estimated at 3.42 million head, or 0.94 percent higher than the previous year's headcount. The growth in the supply of cattle was evidenced by an increase in the beginning stocks and in the number of live births which grew by 0.78 percent and 0.81 percent, respectively.
- ❖ In 2009, total disposition of cattle was estimated at 826.37 thousand head, up by 2.75 percent from last year's output. The number of cattle slaughtered for meat in 2009 increased by 2.79 percent against last year's record.

Table 6. Cattle Imports by Classification, Philippines, 2007-2009
(Number of Head)

ITEM	2007	2008	2009	Percent Change	
				08/07	09/08
Breeder	570	484	1,399	(15.09)	189.05
Feeder	17,412	9,217	13,590	(47.07)	47.44
Total	17,982	9,701	14,989	(46.05)	54.51

Source : Bureau of Animal Industry

Cattle Imports

- ❖ In 2009, the number of imported live cattle was recorded at 14,989 head. This was 54.51 percent higher than last year's importation. More than 90 percent of the total importation were feeder cattle and the rest were breeders.



SUPPLY AND UTILIZATION

Table 7. Supply and Utilization Accounts of Beef, Philippines, 2007-2009
(in metric tons)

ITEM	2007	2008	2009P	Percent Change	
				08/07	09/08
SUPPLY	222,862	234,200	231,047	5.09	(1.35)
Production	178,041	184,363	189,506	3.55	2.79
Imports ^{1/}	44,821	49,837	41,541	11.19	(16.65)
UTILIZATION	222,862	234,199	231,047	5.09	(1.35)
Exports	53	-	-	-	-
Processing	17,804	18,436	18,951	3.55	2.79
Net Food Disposable	205,005	215,763	212,096	5.25	(1.70)
Carcass	179,063	187,388	183,660	4.65	(1.99)
Per Capita (Kg/Yr)	2.02	2.07	1.99	2.48	(3.86)
Offals	25,942	28,375	28,436	9.38	0.21
Per Capita (Kg/Yr)	0.29	0.31	0.31	6.90	0.00

P-Preliminary Estimates

Source: BAS-Agricultural Accounts & Statistical Indicators Division

^{1/} Source: National Statistics Office

- ❖ The total beef supply in 2009 was estimated at 231.05 thousand metric tons. It dropped by 1.35 percent from last year's level of 237.20 thousand metric tons.
- ❖ In 2009, the volume of beef imports was 41.54 thousand metric tons. It decreased by 16.55 percent from the previous year's level of 49.84 thousand metric tons.
- ❖ The estimated net food disposable in 2009 was 212,096 metric tons, down by 1.70 percent from the 2008 level of 215,763 metric tons.
- ❖ The derived per capita consumption of beef in 2009 was 1.99 kilograms per year, offals and processed meat excluded.

Table 8. Volume and Value of Beef Imports, by Quarter, Philippines, 2007-2009

Beef Imports

ITEM	2007	2008	2009	Percent Change	
				08/07	09/08
Volume (m.t.)	44,810.71	49,836.65	41,541.21	11.22	(16.65)
Jan-Mar	10,349.24	12,535.69	8,958.44	21.13	(28.54)
Apr-Jun	13,255.39	13,369.21	8,156.62	0.86	(38.99)
Jul-Sep	11,359.59	12,640.36	12,512.23	11.27	(1.01)
Oct-Dec	9,846.49	11,291.39	11,913.92	14.67	5.51
Value (FOB '000 US\$)	54,607.19	68,506.98	51,757.59	25.45	(24.45)
Jan-Mar	12,874.48	14,369.40	11,312.56	11.61	(21.27)
Apr-Jun	15,720.91	15,724.50	9,026.40	0.02	(42.60)
Jul-Sep	14,677.52	20,330.35	15,370.16	38.51	(24.40)
Oct-Dec	11,334.28	18,082.73	16,048.47	59.54	(11.25)

Source: BAS-AMSAD based on basic data from NSO

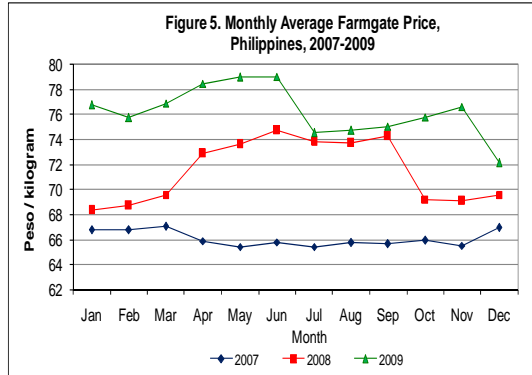
- ❖ The volume of beef imports in 2009 was 41.54 thousand metric tons valued at US\$ 51.76 million FOB. Compared with last year's levels, the volume and value of imports decreased by 16.65 percent and 24.45 percent, respectively.
- ❖ The largest volume of imports was registered during the 3rd quarter of 2009.



PRICES

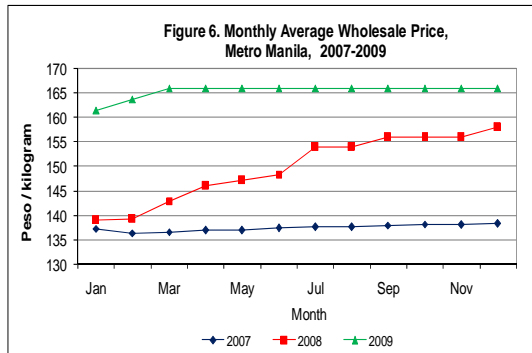
Farmgate Price

- ❖ The annual average farmgate price of live cattle in 2009 was P76.23 per kilogram. This was 6.66 percent more than last year's annual average price of P71.47 per kilogram.



Wholesale Price

- ❖ In 2009, the annual average wholesale price of beef per kilogram (dressed weight) in Metro Manila was P165.44. This was 10.49 percent higher than last year's price of P149.73 per kilogram.



Retail Price

- ❖ The annual average retail price of beef rump in 2009 was P244.18 per kilogram. This was 6.69 percent higher than last year's average price of P228.26 per kilogram.

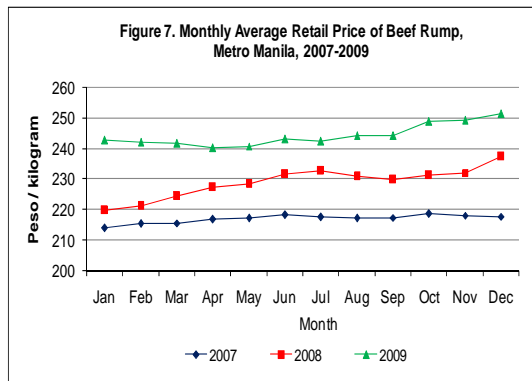




Table 9. Monthly Average Prices by Type, by Market Level, Philippines and Metro Manila, 2007-2009

MONTH	Farmgate Price (P/KG) *				
	Philippines				
	2007	2008	2009	Percent Change	
				08/07	09/08
January	66.77	68.35	76.78	2.37	12.33
February	66.76	68.73	75.75	2.95	10.21
March	67.03	69.60	76.91	3.83	10.50
April	65.91	72.89	78.46	10.59	7.64
May	65.42	73.60	78.97	12.50	7.30
June	65.80	74.73	79.03	13.57	5.75
July	65.44	73.78	74.54	12.74	1.03
August	65.73	73.74	74.71	12.19	1.32
September	65.65	74.26	75.04	13.12	1.05
October	65.96	69.22	75.79	4.94	9.49
November	65.54	69.10	76.62	5.43	10.88
December	66.96	69.61	72.15	3.96	3.65
Annual Ave.	66.16	71.47	76.23	8.02	6.66
MONTH	Wholesale Price (P/KG.) *				
	Metro Manila				
	2007	2008	2009	Percent Change	
				08/07	09/08
January	137.33	139.00	161.50	1.22	16.19
February	136.40	139.24	163.75	2.08	17.60
March	136.67	143.00	166.00	4.63	16.08
April	137.00	145.95	166.00	6.53	13.74
May	137.00	147.20	166.00	7.45	12.77
June	137.40	148.40	166.00	8.01	11.86
July	137.60	154.00	166.00	11.92	7.79
August	137.60	154.00	166.00	11.92	7.79
September	138.00	156.00	166.00	13.04	6.41
October	138.20	156.00	166.00	12.88	6.41
November	138.17	156.00	166.00	12.90	6.41
December	138.30	158.00	166.00	14.24	5.06
Annual Ave.	137.47	149.73	165.44	8.92	10.49
MONTH	Retail Price (Beef Rump, P/Kg.) *				
	Metro Manila				
	2007	2008	2009	Percent Change	
				08/07	09/08
January	214.01	219.75	242.58	2.68	10.39
February	215.41	221.06	242.07	2.62	9.50
March	215.59	224.44	241.54	4.11	7.62
April	216.75	227.29	240.26	4.86	5.71
May	217.20	228.31	240.72	5.12	5.44
June	218.24	231.58	243.14	6.11	4.99
July	217.50	232.67	242.28	6.97	4.13
August	217.31	230.75	244.06	6.18	5.77
September	217.41	229.75	244.17	5.68	6.28
October	218.54	231.18	248.87	5.78	7.65
November	218.12	232.14	249.14	6.43	7.32
December	217.76	237.35	251.28	9.00	5.87
Annual Ave.	216.99	228.86	244.18	5.47	6.69

* Pesos per kilogram liveweight

Source: BAS-AMSAD



Table 10. Cattle Inventory in Backyard and Commercial Farms, by Region, by Semester, Philippines, 2008-2010
(Number of Head)

REGION	2008		2009		2010
	Jan 1	July 1	Jan 1	July 1	Jan 1P
TOTAL					
PHILIPPINES	2,566,492	2,580,071	2,586,386	2,600,363	2,596,031
Cordillera Administrative Region	55,472	56,027	53,469	55,388	53,483
Ilocos Region	347,710	344,007	347,950	344,056	345,273
Cagayan Valley	190,852	189,649	192,404	197,463	197,541
Central Luzon	171,243	171,971	172,243	174,955	171,144
CALABARZON	250,500	253,304	254,749	256,376	257,606
MIMAROPA	102,422	99,146	94,488	91,611	87,144
Bicol Region	72,261	72,096	69,200	70,776	68,759
Western Visayas	203,858	205,271	212,634	217,179	222,935
Central Visayas	270,879	269,393	269,306	271,754	275,207
Eastern Visayas	20,353	19,202	17,799	16,670	14,775
Zamboanga Peninsula	155,324	153,244	160,970	151,934	155,994
Northern Mindanao	267,835	280,976	277,784	285,520	281,063
Davao Region	139,474	141,713	138,179	138,205	140,144
SOCCSKSARGEN	198,036	196,482	199,045	200,310	203,105
Caraga	15,677	16,050	16,522	17,562	18,097
Autonomous Region in Muslim Mindanao	104,596	111,540	109,644	110,604	103,761
BACKYARD PHILIPPINES	2,408,733	2,414,205	2,421,725	2,433,399	2,432,475
Cordillera Administrative Region	47,154	47,943	45,673	47,593	45,778
Ilocos Region	343,873	339,830	343,972	340,164	341,669
Cagayan Valley	178,393	177,470	179,448	180,577	180,111
Central Luzon	146,251	149,197	149,909	155,048	152,260
CALABARZON	245,820	248,256	249,842	251,029	252,217
MIMAROPA	92,587	89,181	84,421	81,688	77,273
Bicol Region	43,396	44,625	42,568	43,329	42,110
Western Visayas	202,210	203,627	210,965	215,575	221,318
Central Visayas	268,523	267,129	267,054	269,709	273,439
Eastern Visayas	14,685	13,951	12,929	12,247	10,728
Zamboanga Peninsula	154,830	152,805	160,577	151,569	155,633
Northern Mindanao	251,846	251,204	248,628	255,818	252,360
Davao Region	133,234	136,172	132,154	132,279	134,601
SOCCSKSARGEN	167,425	167,433	169,113	170,327	172,832
Caraga	15,001	15,368	15,875	16,890	17,421
Autonomous Region in Muslim Mindanao	103,505	110,014	108,597	109,557	102,725
COMMERCIAL PHILIPPINES	157,759	165,866	164,661	166,964	163,556
Cordillera Administrative Region	8,318	8,084	7,796	7,795	7,705
Ilocos Region	3,837	4,177	3,978	3,892	3,604
Cagayan Valley	12,459	12,179	12,956	16,886	17,430
Central Luzon	24,992	22,774	22,334	19,907	18,884
CALABARZON	4,680	5,048	4,907	5,347	5,389
MIMAROPA	9,835	9,965	10,067	9,923	9,871
Bicol Region	28,865	27,471	26,632	27,447	26,649
Western Visayas	1,648	1,644	1,669	1,604	1,617
Central Visayas	2,356	2,264	2,252	2,045	1,768
Eastern Visayas	5,668	5,251	4,870	4,423	4,047
Zamboanga Peninsula	494	439	393	365	361
Northern Mindanao	15,989	29,772	29,156	29,702	28,703
Davao Region	6,240	5,541	6,025	5,926	5,543
SOCCSKSARGEN	30,611	29,049	29,932	29,983	30,273
Caraga	676	682	647	672	676
Autonomous Region in Muslim Mindanao	1,091	1,526	1,047	1,047	1,036

P—Preliminary estimates



Table 11. Total Production by Region, by Quarter, Philippines, 2008-2009

(in '000 metric tons liveweight)

REGION	PRODUCTION									
	2008					2009				
	Q 1	Q2	Q 3	Q 4	Annual	Q 1	Q 2	Q 3	Q 4P	Annual
PHILIPPINES	55,785	59,834	55,250	68,287	239,156	55,967	61,817	56,268	71,048	245,100
LUZON	24,573	27,119	24,915	32,929	109,536	24,853	28,642	25,354	32,190	111,039
Cordillera										
Administrative Region	1,274	1,365	1,341	1,782	5,762	1,210	1,214	1,302	1,775	5,501
Ilocos Region	6,801	6,766	7,023	7,391	27,981	6,909	6,733	7,153	6,153	26,948
Cagayan Valley	3,380	2,923	3,120	3,577	13,000	3,213	2,928	3,136	3,006	12,283
Central Luzon	3,435	4,230	4,321	4,814	16,800	3,297	4,401	4,694	4,904	17,296
CALABARZON	4,772	6,663	3,739	7,627	22,801	4,962	7,603	3,813	7,815	24,193
MIMAROPA	2,027	2,751	2,081	4,231	11,090	2,168	2,759	2,109	4,739	11,775
Bicol Region	2,884	2,421	3,290	3,507	12,102	3,094	3,004	3,147	3,798	13,043
VISAYAS	11,861	9,264	11,414	12,167	44,706	11,807	10,483	11,605	12,892	46,787
Western Visayas	5,225	4,244	4,336	4,452	18,257	5,048	5,168	4,730	4,832	19,778
Central Visayas	5,972	4,447	6,198	7,267	23,884	6,103	4,536	6,055	7,650	24,344
Eastern Visayas	664	573	880	448	2,565	656	779	820	410	2,665
MINDANAO	19,351	23,451	18,921	23,191	84,914	19,307	22,692	19,309	25,966	87,274
Zamboanga Peninsula	3,398	3,963	3,788	4,862	16,011	3,479	2,768	3,829	4,131	14,207
Northern Mindanao	7,783	9,150	6,270	7,466	30,669	7,855	9,450	6,450	9,860	33,615
Davao Region	2,355	2,616	2,538	2,936	10,445	2,375	2,633	2,492	2,700	10,200
SOCCKSARGEN	3,495	4,264	3,589	5,125	16,473	3,402	4,725	3,748	5,236	17,111
Caraga	400	300	400	210	1,310	410	228	390	196	1,224
Autonomous Region in Muslim Mindanao	1,920	3,158	2,336	2,592	10,006	1,786	2,888	2,400	3,843	10,917

P-Preliminary estimates

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