

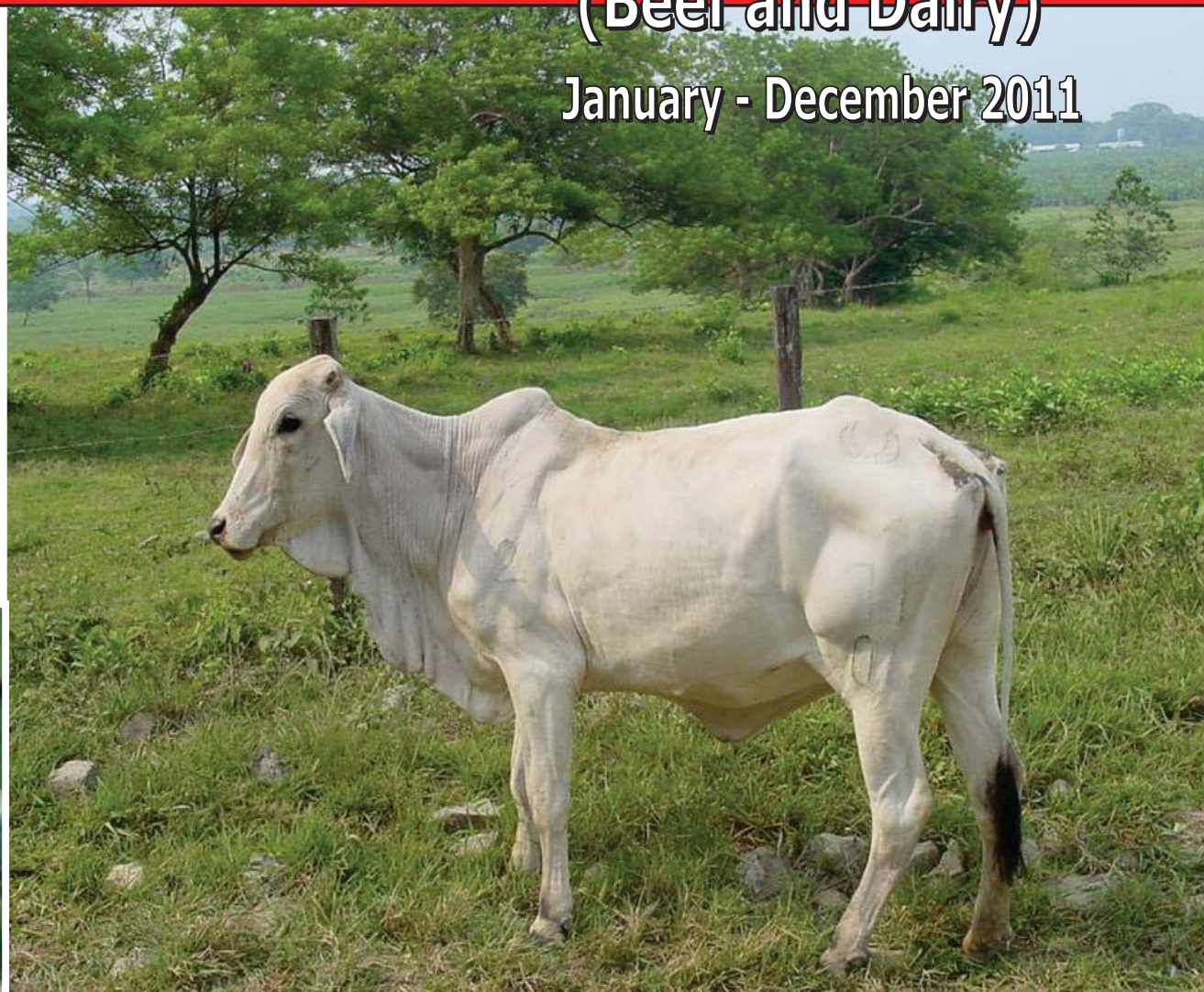
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Republic of the Philippines
Department of Agriculture
BUREAU OF AGRICULTURAL STATISTICS
Quezon City

CATTLE INDUSTRY PERFORMANCE REPORT (Beef and Dairy)

January - December 2011



June 2012



EXPLANATORY NOTES

This annual Industry Performance Report on Cattle 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 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 9,700 sample households in 673 sample barangays nationwide; and
- 2) The Commercial Livestock and Poultry Survey (CLPS) which covers 654 independent farms as of January 2011 updated list. A cattle farm is considered commercial when it has a farm capacity of at least 21 head of adult cattle.

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

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

*Also known as Survey of Animals Slaughtered in Abattoirs and Dressing Plants

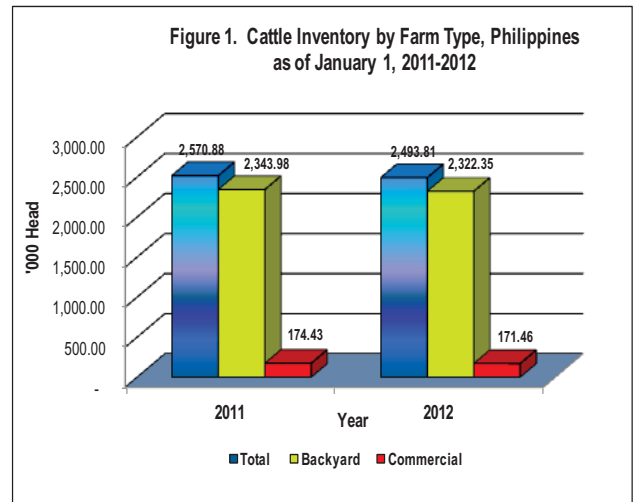
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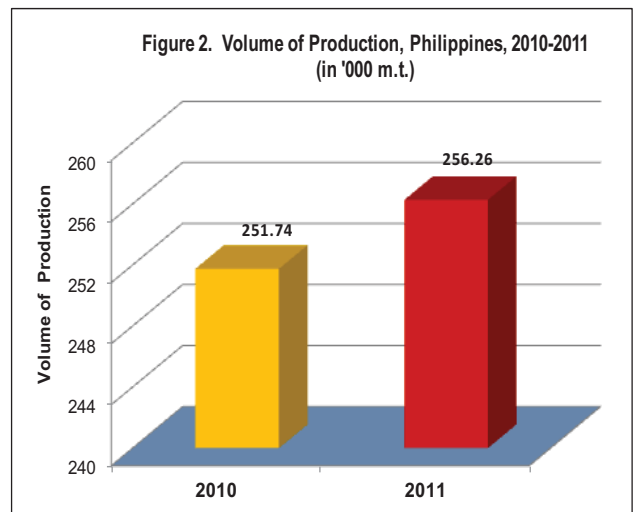


HIGHLIGHTS

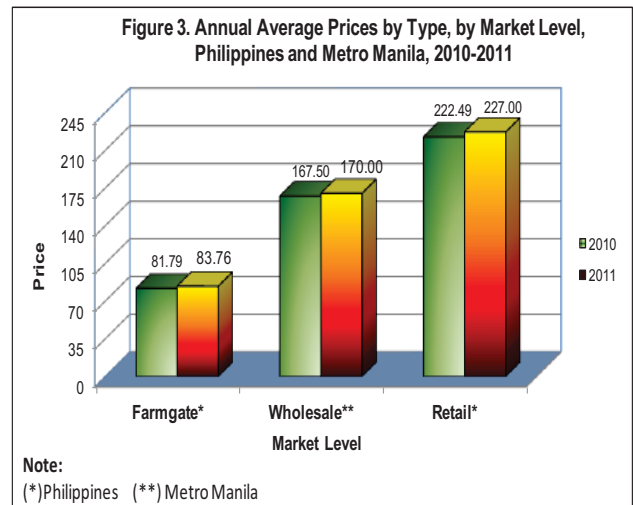
❖ As of January 1, 2012, the total cattle inventory in the country was 2.49 million head. This was 0.98 percent lower than last year's record of 2.52 million head. Inventory of cattle from backyard and commercial farms contracted by 0.92 and 1.70 percent, respectively. Around 93 percent of the total cattle inventory were raised in backyard farms.



❖ In 2011, total cattle production was 256.26 thousand metric tons. It was 1.79 percent higher than the previous year's production of 251.74 thousand metric tons.



❖ In 2011, the annual average farmgate price of live cattle was P83.76 per kilogram, 2.41 percent higher than the previous year's price of P81.79. At the wholesale level, the annual average price was P170.00 per kilogram, 1.49 percent higher than last year's P167.50 per kilogram. The annual average retail price of beef rump is P227.00 per kilogram, 2.03 percent higher than the previous year's P222.49 per kilogram.





1 CATTLE INDUSTRY PERFORMANCE REPORT

INVENTORY

**Table 1. Cattle Inventory by Farm Type and by Age Classification, Philippines, January 1, 2010-2012
(Number of Head)**

ITEM	2010	2011	2012	Percent Change	
				11/10	12/11
TOTAL	2,570,879	2,518,407	2,493,803	(2.04)	(0.98)
BACKYARD	2,403,296	2,343,975	2,322,345	(2.47)	(0.92)
COMMERCIAL	167,583	174,432	171,458	4.09	(1.70)
COW	1,065,543	1,073,182	1,068,419	0.72	(0.44)
Backyard	996,389	999,508	994,166	0.31	(0.53)
Commercial	69,154	73,674	74,253	6.54	0.79
HEIFER	438,039	430,211	425,835	(1.79)	(1.02)
Backyard	399,296	389,833	385,285	(2.37)	(1.17)
Commercial	38,743	40,378	40,550	4.22	0.43
YEARLING^{1/}	496,777	483,312	477,787	(2.71)	(1.14)
Backyard	468,324	453,900	448,802	(3.08)	(1.12)
Commercial	28,453	29,412	28,985	3.37	(1.45)
BULLS	294,647	285,723	283,451	(3.03)	(0.80)
Backyard	280,923	271,568	269,558	(3.33)	(0.74)
Commercial	13,724	14,155	13,893	3.14	(1.85)
OTHERS^{2/}	275,873	245,980	238,311	(10.84)	(3.12)
Backyard	258,364	229,167	224,534	(11.30)	(2.02)
Commercial	17,509	16,813	13,777	(3.98)	(18.06)

P-Preliminary

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

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

Figure 4. Distribution of Inventory by Age Classification, Philippines, as of January 1, 2012

- ❖ As of January 1, 2012, the total cattle inventory was 2,493,803 head or 0.98 percent lower than last year's inventory of 2,518,407 head.
- ❖ Of the total cattle population, cows accounted for about 43 percent. Yearlings shared 19 percent, heifers were 17 percent, while bulls and other age classifications accounted for 10 percent.

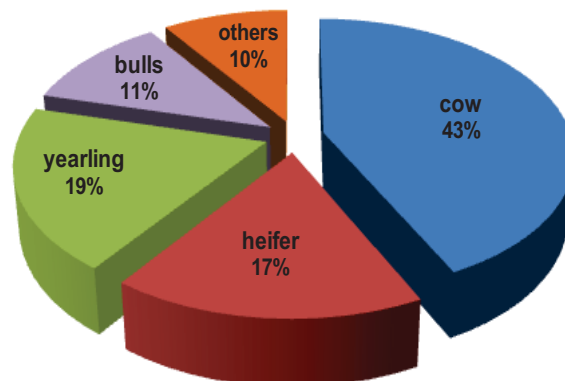




Table 2. Cattle Inventory of Top Producing Regions by Farm Type, as of January 1, 2012P
(Number of Head)

TOTAL (Backyard & Commercial)		BACKYARD		COMMERCIAL	
Region	Inventory	Region	Inventory	Region	Inventory
Ilocos Region	286,449	Ilocos Region	282,977	Bicol Region	32,333
Central Visayas	273,452	Central Visayas	270,065	Cagayan Valley	26,465
Northern Mindanao	272,711	Northern Mindanao	249,745	Northern Mindanao	22,966
Western Visayas	253,458	Western Visayas	249,672	SOCSSKARGEN	21,271
CALABARZON	251,744	CALABARZON	244,416	Central Luzon	19,485
SOCSSKARGEN	192,356	SOCSSKARGEN	171,085	MIMAROPA	11,486
Sub-Total	1,530,170		1,467,960		134,006
Others	963,633		854,385		37,452
Philippines	2,493,803		2,322,345		171,458
Percent Share					
Ilocos Region	11.49	Ilocos Region	12.18	Bicol Region	18.86
Central Visayas	10.97	Central Visayas	11.63	Cagayan Valley	15.44
Northern Mindanao	10.94	Northern Mindanao	10.75	Northern Mindanao	13.39
Western Visayas	10.16	Western Visayas	10.75	SOCSSKARGEN	12.41
CALABARZON	10.09	CALABARZON	10.52	Central Luzon	11.36
SOCSSKARGEN	7.71	SOCSSKARGEN	7.37	MIMAROPA	6.70
Sub-Total	61.36		63.21		78.16
Others	38.64		36.79		21.84
Philippines	100.00		100.00		100.00

P-Preliminary

Top Producing Regions

- ❖ The top five (5) producing regions in terms of total cattle inventory were Ilocos Region, Central Visayas, Northern Mindanao, Western Visayas and CALABARZON. They contributed 53.65 percent to the total cattle inventory in the country.
- ❖ Ilocos Region had the highest share of 12.18 percent of the total backyard population. Bicol Region, on the other hand, accounted for the highest share at 18.86 percent of the total commercial cattle population in the country.

Table 1a. Inventory of Dairy Cattle by Age, as of January 1, 2010–20112
(Number of Head)

ANIMAL TYPE/AGE	2010	2011	2012P	Percent Change	
				11/10	12/11
CATTLE	16,949	17,405	19,292	2.69	10.84
Bull	615	643	722	4.54	12.29
Dam	7,583	7,951	8,563	4.85	7.70
Heifer	2,231	2,134	2,404	(4.35)	12.65
Yearling	3,041	3,104	3,575	2.06	15.17
Calf	3,478	3,573	4,028	2.73	12.73

P-Preliminary

Inventory of Dairy Cattle

- ❖ As of January 1, 2012, the total inventory of dairy cattle was 19,292 head. This was 10.84 percent higher compared with last year's inventory of 16,949 head.
- ❖ Of the total dairy cattle inventory, 44.39 percent were dams, 20.88 percent were calves, and 18.53 percent were yearlings. The rest were heifers and bulls which accounted for 12.46 percent and 3.74 percent of the total inventory, respectively.



PRODUCTION

**Table 3. Volume of Production, by Quarter, Philippines, 2009-2011
(in '000 m.t. liveweight)**

QUARTER	2009	2010	2011	Percent Change	
				10/09	11/10
TOTAL	245.10	251.74	256.26	2.71	1.79
Jan-Mar	55.97	57.91	57.75	3.47	(0.28)
Apr-Jun	61.82	64.93	65.59	5.04	1.01
Jan-Jun	117.78	122.84	123.34	4.29	0.40
Jul-Sep	56.27	55.60	57.56	(1.20)	3.54
Oct-Dec	71.05	73.31	75.36	3.18	2.80
Jul-Dec	127.32	128.90	132.92	1.25	3.12

- ❖ In 2011, the total cattle production stood at 256.26 thousand metric tons. It was 1.79 percent higher than the previous year's production of 251.74 thousand metric tons.
 - ❖ Except for 1st quarter, cattle production recorded positive growth in three (3) consecutive quarters of 2011. The highest increment of 3.54 percent was observed in the 3rd quarter.
-
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MILK PRODUCTION

**Table 4: Animals on the Milcline and Milk Production by Source
Philippines, 2010-2011**

ANIMAL TYPE/SOURCE	2010		2011		Percent Change 11/10	
	Animals on the milcline	Production (LME* in '000 liters)	Animals on the milcline	Production (LME* in '000 liters)	Animals on the milcline	Production (LME* in '000 liters)
CATTLE	4,425	9,842.64	4,650	10,220.71	5.08	3.84
Individual	1,343	2,292.85	1,329	2,671.15	(1.04)	16.50
Cooperative	2,394	5,919.45	2,516	5,606.67	5.10	(5.28)
Commercial	362	1,080.24	393	1,134.47	8.56	5.02
Institutional	326	550.10	412	808.42	26.38	46.96

Source: National Dairy Authority (NDA)

*LME- refers to Liquid Milk Equivalent

- ❖ In 2011, the total number of cattle on the milcline was 4,650 head, 5.08 percent higher than the previous year's level of 4,425 head.
- ❖ The 2011 production of cow's milk was 10.22 million liters. It grew by 3.84 percent from last year's level of 9.84 million liters.
- ❖ In 2011, 55 percent of the total cows' milk came from the dairy cooperatives. There was a decrease of 5.28 percent from the 2010 record.



SUPPLY AND DISPOSITION

**Table 5. Supply and Disposition, Philippines, 2009-2011
(Number of live animals)**

ITEM	2009	2010	2011P	Percent Change	
				10/09	11/10
TOTAL SUPPLY	3,444,972	3,403,771	3,384,018	(1.20)	(0.58)
Beginning Inventory	2,586,386	2,570,879	2,518,407	(0.60)	(2.04)
Born Alive	837,750	803,602	806,369	(4.08)	0.34
Imports*	14,989	16,066	22,023	7.19	37.08
DISPOSITION	874,093	885,364	890,215	1.29	0.55
Slaughtered	808,190	830,720	836,229	2.79	0.66
Death/Losses	18,038	18,735	16,769	3.86	(10.49)
ENDING INVENTORY	2,570,879	2,518,407	2,493,803	(2.04)	(0.98)

P-Preliminary

* Source : Bureau of Animal Industry

- ❖ The total supply of cattle in 2011 was 3.84 million head, or 0.58 percent lower than the previous year's record. The reduction in the supply of cattle was traced to the decrease in the beginning stocks which went down by 2.04 percent.
- ❖ In 2011, total disposition of cattle was 890.22 thousand head, up by 0.55 percent compared with last year's record. The number of cattle slaughtered for meat in 2011 increased by 0.66 percent against last year's level.

**Table 6. Cattle Imports by Classification,
Philippines, 2009-2011
(Number of Head)**

ITEM	2009	2010	2011	Percent Change	
				10/09	11/10
Breeder	1,399	910	1,537	(34.95)	68.90
Feeder	13,590	15,156	20,486	11.52	35.17
Total	14,989	16,066	22,023	7.19	37.08

Source : Bureau of Animal Industry

Cattle Imports

The number of imported live cattle in 2011 was recorded at 22,023 head. This was 37.08 percent higher than the 2010 importation. More than 93 percent of the total importation were feeder cattle and the rest were breeders



SUPPLY UTILIZATION

Table 7. Supply Utilization Accounts of Beef, Philippines, 2009-2011
(in metric ton)

ITEM	2009	2010	2011P	Percent Change	
				10/09	11/10
SUPPLY	231,021	244,816	244,687	5.97	(0.05)
Production	189,480	194,754	196,045	2.78	0.66
Imports ^{1/}	41,541	50,062	48,642	20.51	(2.84)
UTILIZATION	231,021	244,816	244,688	5.97	(0.05)
Exports	-	1			
Processing	18,948	19,475	19,605	2.78	0.67
Net Food Disposable	212,073	225,340	225,083	6.26	(0.11)
Carcass	183,640	194,559	195,265	5.95	0.36
Per Cap (Kg/Yr)	1.99	2.11	2.04	6.03	(3.32)
Offals	28,433	30,781	29,818	8.26	(3.13)
Per Cap (Kg/Yr)	0.31	0.33	0.31	6.45	(6.06)

P-Preliminary

Source: BAS-Agricultural Accounts & Statistical Indicators Division

^{1/} Source: National Statistics Office

- ❖ In 2011, the total beef supply went down by 0.05 percent from last year's volume of 244,816 metric tons.
- ❖ The volume of beef imports in 2011 was 48,462 metric tons. It was 2.84 percent lower than last year's level of 50,062 metric tons.
- ❖ The estimated net disposable in 2011 was 225,083 metric tons, or 0.11 percent lower than last year's record.
- ❖ This year, the estimated per capita consumption of carcass meat and offals were 2.04 kilograms and 0.31 kilogram, respectively.

Table 8. Volume and Value of Beef Imports, by Quarter, Philippines, 2009-2011

ITEM	2009	2010	2011	Percent Change	
				10/09	11/10
Volume (m.t.)	41,541.59	50,061.97	49,251.98	20.51	(1.62)
Jan-Mar	8,958.44	11,999.31	12,104.28	33.94	0.87
Apr-Jun	8,156.62	12,525.52	14,416.10	53.56	15.09
Jul-Sep	12,512.61	13,885.96	12,404.71	10.98	(10.67)
Oct-Dec	11,913.92	11,651.17	10,326.89	(2.21)	(11.37)
Value (FOB '000 US\$)	52,602.68	81,870.91	132,311.54	55.64	61.61
Jan-Mar	11,312.56	13,518.01	31,814.20	19.50	135.35
Apr-Jun	9,026.40	16,664.88	39,693.24	84.62	138.18
Jul-Sep	16,215.25	26,571.08	33,575.34	63.86	26.36
Oct-Dec	16,048.47	25,116.94	27,228.76	56.51	8.41

Source: BAS-AMSAD based on basic data from NSO

Beef Imports

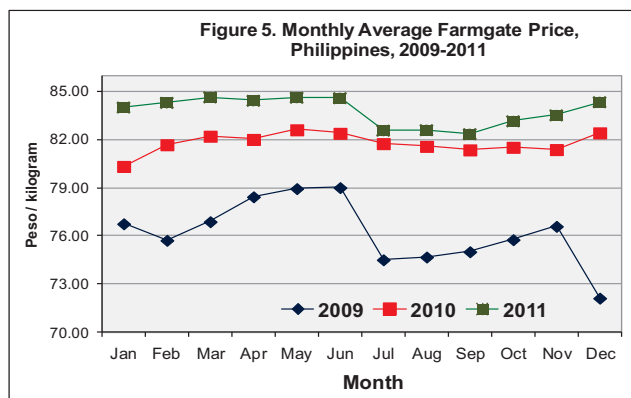
- ❖ The volume of beef imports in 2011 was 49.25 thousand metric tons. The value of imports was US\$ 132.31 million FOB. Compared with last year's levels, the volume declined by 1.62 percent while value of imports increased by 61.61 percent
- ❖ The largest volume of imports was registered during the second quarter of 2011.



PRICES

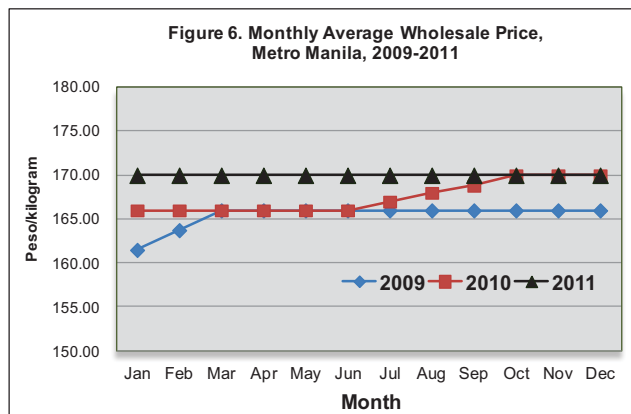
Farmgate Price

- ❖ The annual average farmgate price of live cattle in 2011 was P83.76 per kilogram. It increased by 2.41 percent from the previous year's annual average price of P81.79 per kilogram.



Wholesale Price

- ❖ In 2011, the annual average wholesale price of beef per kilogram (Carcass weight) in Metro Manila was P170.00. This was 1.49 percent higher than the 2010 price of P167.50 per kilogram.



Retail Price

- ❖ The annual average retail price of beef rump in 2011 was P227.00 per kilogram. This was 2.03 percent lower than last year's average price of P222.49 per kilogram. The highest retail price in 2011 was recorded during the month of December at P229.29 per kilogram and the lowest was in January at P225.27 per kilogram.

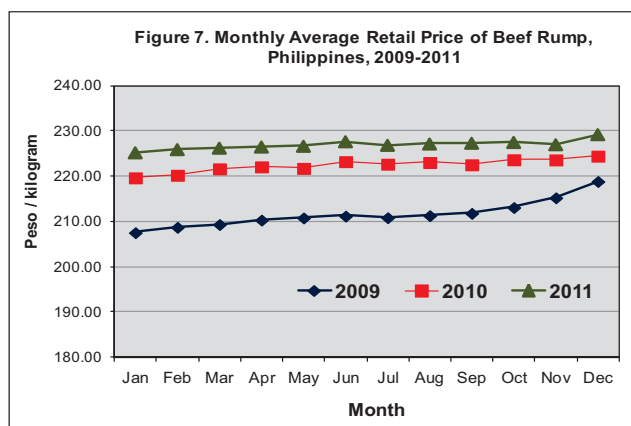




Table 9. Monthly Average Prices, by Market Level, Philippines and Metro Manila, 2009-2011

MONTH	Farmgate Price (P/KG) *				
	Philippines				
	2009	2010	2011	Percent Change	
				10/09	11/10
January	76.78	80.35	84.01	4.65	4.56
February	75.75	81.70	84.30	7.85	3.18
March	76.91	82.23	84.64	6.92	2.93
April	78.46	82.03	84.43	4.55	2.93
May	78.97	82.63	84.62	4.63	2.41
June	79.03	82.41	84.59	4.28	2.65
July	74.54	81.77	82.57	9.70	0.98
August	74.71	81.60	82.60	9.22	1.23
September	75.04	81.38	82.35	8.45	1.19
October	75.79	81.54	83.15	7.59	1.97
November	76.62	81.40	83.52	6.24	2.60
December	72.15	82.44	84.34	14.26	2.30
Annual Ave.	76.23	81.79	83.76	7.29	2.41
MONTH	Wholesale Price (P/KG.) *				
	Metro Manila				
	2009	2010	2011	Percent Change	
				10/09	11/10
January	161.50	166.00	170.00	2.79	2.41
February	163.75	166.00	170.00	1.37	2.41
March	166.00	166.00	170.00	0.00	2.41
April	166.00	166.00	170.00	0.00	2.41
May	166.00	166.00	170.00	0.00	2.41
June	166.00	166.00	170.00	0.00	2.41
July	166.00	167.00	170.00	0.60	1.80
August	166.00	168.00	170.00	1.20	1.19
September	166.00	168.80	170.00	1.69	0.71
October	166.00	170.00	170.00	2.41	0.00
November	166.00	170.00	170.00	2.41	0.00
December	166.00	170.00	170.00	2.41	0.00
Annual Ave.	165.48	167.50	170.00	1.22	1.49
MONTH	Retail Price (Beef Rump, P/Kg.) *				
	Philippines				
	2009	2010	2011	Percent Change	
				10/09	11/10
January	207.63	219.76	225.27	5.84	2.51
February	208.81	220.33	225.98	5.52	2.56
March	209.43	221.75	226.30	5.88	2.05
April	210.41	222.19	226.55	5.60	1.96
May	210.89	221.85	226.72	5.20	2.20
June	211.29	223.34	227.72	5.70	1.96
July	210.94	222.78	226.93	5.61	1.86
August	211.39	223.15	227.22	5.56	1.82
September	211.90	222.65	227.39	5.07	2.13
October	213.19	223.76	227.56	4.96	1.70
November	215.34	223.73	227.06	3.90	1.49
December	218.95	224.56	229.29	2.56	2.11
Annual Ave.	211.68	222.49	227.00	5.11	2.03

* Pesos per kilogram liveweight

Source: BAS-AMSAD



**Table 10 : Inventory in Backyard and Commercial Farms,
by Region, by Semester, Philippines, 2010-2012
(Number of Head)**

Region	2010		2011		2012
	Jan 1	July 1	Jan 1	July 1	Jan 1P
TOTAL					
PHILIPPINES	2,570,879	2,546,919	2,518,407	2,496,258	2,493,803
CAR	53,483	64,076	57,235	56,968	57,574
Ilocos Region	317,073	303,757	291,442	286,579	286,449
Cagayan Valley	197,541	191,211	191,660	186,699	182,196
Central Luzon	173,144	171,775	171,313	169,902	171,821
CALABARZON	255,253	251,365	250,927	251,678	251,744
MIMAROPA	87,144	91,996	90,267	94,331	91,265
Bicol Region	68,759	73,012	73,779	77,150	81,233
Western Visayas	225,383	240,490	243,334	250,844	253,458
Central Visayas	275,207	271,078	273,311	271,183	273,452
Eastern Visayas	15,349	14,641	14,671	14,596	20,843
Zamboanga Peninsula	155,994	142,996	140,079	131,967	129,675
Northern Mindanao	281,442	279,480	278,426	276,339	272,711
Davao Region	140,144	136,330	138,175	136,326	136,540
SOCSSKARGEN	203,105	198,485	195,727	191,446	192,356
Caraga	18,097	19,113	18,828	18,833	19,034
ARMM	103,761	97,114	89,233	81,417	73,452
BACKYARD					
PHILIPPINES	2,403,296	2,370,903	2,343,975	2,325,567	2,322,345
CAR	45,778	52,275	49,932	49,495	49,056
Ilocos Region	313,269	299,430	287,559	282,947	282,977
Cagayan Valley	180,111	171,994	166,343	160,413	155,731
Central Luzon	153,260	152,111	151,571	150,491	152,336
CALABARZON	249,864	243,950	243,438	244,424	244,416
MIMAROPA	77,273	80,549	78,762	82,856	79,779
Bicol Region	42,110	42,360	42,285	45,365	48,900
Western Visayas	221,318	236,860	239,730	247,372	249,672
Central Visayas	273,439	268,492	270,470	268,161	270,065
Eastern Visayas	11,302	11,453	12,249	12,045	17,929
Zamboanga Peninsula	155,633	142,245	139,393	131,217	128,853
Northern Mindanao	252,360	255,575	252,650	252,910	249,745
Davao Region	134,601	130,455	132,858	131,065	131,558
SOCSSKARGEN	172,832	169,321	170,664	169,036	171,085
Caraga	17,421	17,904	18,020	18,088	18,319
ARMM	102,725	95,929	88,051	79,682	71,924
COMMERCIAL					
PHILIPPINES	167,583	176,016	174,432	170,691	171,458
CAR	7,705	11,801	7,303	7,473	8,518
Ilocos Region	3,804	4,327	3,883	3,632	3,472
Cagayan Valley	17,430	19,217	25,317	26,286	26,465
Central Luzon	19,884	19,664	19,742	19,411	19,485
CALABARZON	5,389	7,415	7,489	7,254	7,328
MIMAROPA	9,871	11,447	11,505	11,475	11,486
Bicol Region	26,649	30,652	31,494	31,785	32,333
Western Visayas	4,065	3,630	3,604	3,472	3,786
Central Visayas	1,768	2,586	2,841	3,022	3,387
Eastern Visayas	4,047	3,188	2,422	2,551	2,914
Zamboanga Peninsula	361	751	686	750	822
Northern Mindanao	29,082	23,905	25,776	23,429	22,966
Davao Region	5,543	5,875	5,317	5,261	4,982
SOCSSKARGEN	30,273	29,164	25,063	22,410	21,271
Caraga	676	1,209	808	745	715
ARMM	1,036	1,185	1,182	1,735	1,528

P- Preliminary



Table 11. Volume of Production by Region, by Quarter, Philippines, 2010-2011
(in '000 metric tons, liveweight)

Region	PRODUCTION									
	2010					2011				
	Q 1	Q 2	Q 3	Q 4	Annual	Q 1	Q 2	Q 3	Q 4	Annual
PHILIPPINES	57,911	64,930	55,595	73,307	251,743	57,750	65,588	57,561	75,359	256,258
LUZON	26,279	29,451	25,131	31,855	112,716	26,271	29,363	25,554	31,834	113,022
CAR	1,231	1,083	1,305	1,343	4,962	1,176	1,120	1,360	1,238	4,894
Ilocos Region	7,116	7,046	7,366	5,779	27,307	6,726	7,131	7,000	5,960	26,817
Cagayan Valley	3,682	3,354	3,156	2,928	13,120	3,692	3,281	3,380	3,210	13,563
Central Luzon	4,267	4,051	4,225	5,561	18,104	4,337	4,246	4,270	5,571	18,424
CALABARZON	4,532	8,652	3,632	7,895	24,711	4,669	8,896	3,832	7,233	24,630
MIMAROPA	2,171	2,201	2,001	4,361	10,734	2,236	2,081	2,125	4,555	10,997
Bicol Region	3,280	3,064	3,446	3,988	13,778	3,435	2,608	3,587	4,067	13,697
VISAYAS	11,278	9,888	11,439	13,015	45,620	11,233	10,152	12,379	14,489	48,253
Western Visayas	4,200	4,300	5,209	5,315	19,024	4,229	4,586	5,658	6,052	20,525
Central Visayas	6,430	4,895	5,695	7,330	24,350	6,335	4,837	6,140	8,022	25,334
Eastern Visayas	648	693	535	370	2,246	669	729	581	415	2,394
MINDANAO	20,354	25,591	19,025	28,437	93,407	20,246	26,073	19,628	29,036	94,983
Zamboanga Peninsula	3,896	2,187	3,676	4,357	14,116	3,962	2,065	3,577	4,249	13,853
Northern Mindanao	8,169	10,696	6,480	9,085	34,430	7,924	11,167	6,674	9,459	35,224
Davao Region	2,519	3,300	2,416	3,202	11,437	2,613	3,358	2,469	3,284	11,724
SOCCKSARGEN	3,555	5,155	4,040	5,760	18,510	3,504	5,129	4,314	6,327	19,274
CARAGA	415	267	400	284	1,366	393	265	410	305	1,373
ARMM	1,800	3,986	2,013	5,749	13,548	1,850	4,089	2,184	5,412	13,535

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