

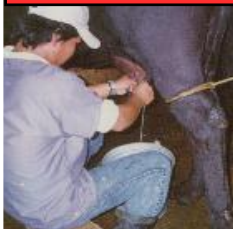


Republic of the Philippines
Department of Agriculture
BUREAU OF AGRICULTURAL STATISTICS
Quezon City

CATTLE INDUSTRY PERFORMANCE REPORT

(Beef and Dairy)

January - December 2012



June 2013



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 882 independent farms as of January 2012 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 Slaughterhouses and Poultry Dressing Plants (SSHDPDP)*. This covers around 1,200 accredited and Locally Registered Meat Establishments (LRMEs) nationwide and is undertaken in coordination with the National Meat Inspection Service (NMIS).

*Formerly known as Survey of Abattoirs and Dressing Plants (SADP)



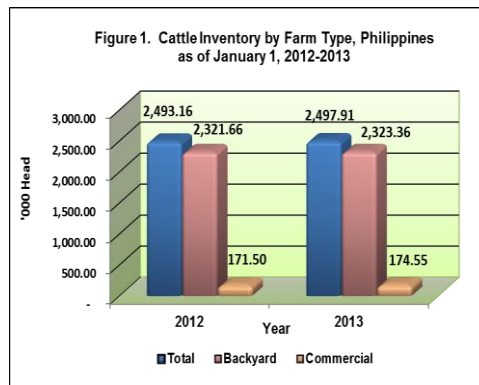
TABLE OF CONTENTS

Explanatory Notes	i
Table of Contents	ii
Highlights	iii
Inventory	
By Farm Type and by Age Classification	1
Dairy Cattle by Age	2
Top Producing Regions	2
Production	3
Milk Production	3
Supply and Disposition	4
Imports	5
Prices	6
Figures	
1. Cattle Inventory by Farm Type, Philippines, as of January 1, 2012-2013	iii
2. Volume of Production, Philippines, 2011-2012	iii
3. Annual Average Prices by Market Level, Philippines and Metro Manila, 2011-2012	iii
4. Distribution of Inventory by Age Classification, Philippines, as of January 1, 2013	1
5. Monthly Average Farmgate Price, Philippines, 2010-2012	6
6. Monthly Average Wholesale Price, Metro Manila, 2010-2012	6
7. Monthly Average Retail Price of Beef Rump, Philippines, 2010-2012	6
Tables	
1. Cattle Inventory by Farm Type and by Age Classification, Philippines, as of January 1, 2011-2013	1
1a. Inventory of Dairy Cattle by Age, as January 1, 2011-2013	2
2. Cattle Inventory of Top Producing Regions, by Farm Type, as of January 1, 2013	2
3. Volume of Production, by Quarter, Philippines, 2010-2012	3
4. Animals on the Milkline and Milk Production by Source, Philippines, 2011-20112	3
5. Supply and Disposition, Philippines, 2010-2012	4
6. Beef: Volume and Value of Meat Imports, by Quarter, Philippines, 2010-2012	5
7. Cattle Imports by Classification, Philippines, 2010-2012	6
8. Monthly Average Prices by Market Level, Philippines and Metro Manila, 2010-2012	7
9. Cattle Inventory in Backyard and Commercial Farms, by Region, by Semester, Philippines, 2010-2013	8
10. Volume of Production, by Region, by Quarter, Philippines, 2011-2012	9

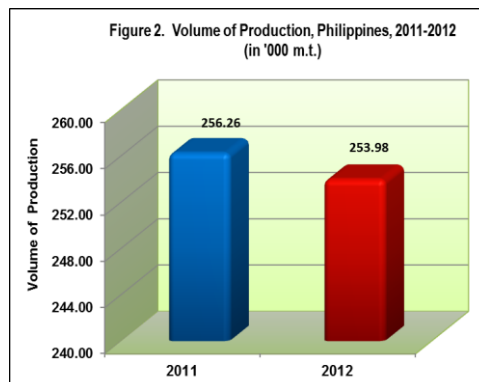


HIGHLIGHTS

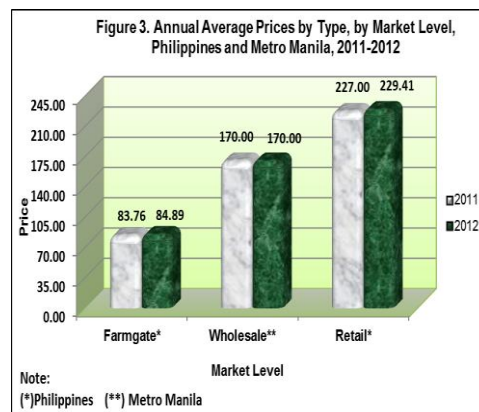
❖ The total cattle inventory in the country as of January 1, 2013 was almost 2.50 million heads. This was 0.19 percent higher than last year's record of 2.49 million heads. Of the total inventory, about 2.32 million heads or 93.00 percent were raised in backyard farms. The remaining 7.00 percent or about 0.17 million head were raised in commercial farms.



❖ The country's total cattle production in 2012 was 253.98 thousand metric tons. It went down by 0.89 percent from last year's production of 256.26 thousand metric tons.



❖ In 2012, the annual average farmgate price of live cattle was P84.89 per kilogram, 1.35 percent higher than the previous year's price of P83.76. At the wholesale level, the annual average price was P170.00 per kilogram. It had the same average wholesale price last year. The annual average retail price of beef rump is P229.41 per kilogram, 1.06 percent higher than the previous year's P227.00 per kilogram.





INVENTORY

Table 1. Cattle Inventory by Farm Type and by Age Classification, Philippines, January 1, 2011-2013 (Number of Head)

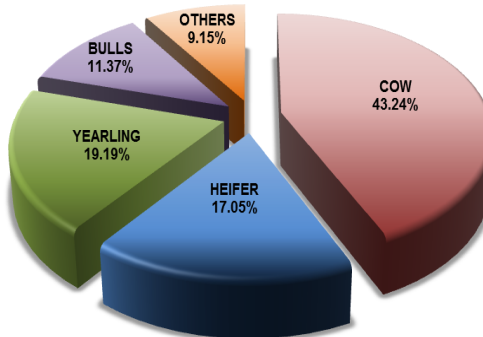
ITEM	2011	2012	2013	Percent Change	
				12/11	13/12
TOTAL	2,518,407	2,493,157	2,497,908	(1.00)	0.19
BACKYARD	2,343,975	2,321,655	2,323,361	(0.95)	0.07
COMMERCIAL	174,432	171,502	174,547	(1.68)	1.78
COW	1,073,182	1,081,149	1,080,128	0.74	(0.09)
Backyard	999,508	1,006,062	1,003,183	0.66	(0.29)
Commercial	73,674	75,087	76,945	1.92	2.47
HEIFER	430,211	425,835	425,964	(1.02)	0.03
Backyard	389,833	385,285	384,727	(1.17)	(0.14)
Commercial	40,378	40,550	41,237	0.43	1.69
YEARLING^{1/}	483,312	477,787	479,237	(1.14)	0.30
Backyard	453,900	448,802	449,870	(1.12)	0.24
Commercial	29,412	28,985	29,367	(1.45)	1.32
BULLS	285,723	283,451	283,942	(0.80)	0.17
Backyard	271,568	269,558	269,967	(0.74)	0.15
Commercial	14,155	13,893	13,975	(1.85)	0.59
OTHERS^{2/}	245,980	224,935	228,637	(8.56)	1.65
Backyard	229,167	211,948	215,614	(7.51)	1.73
Commercial	16,813	12,987	13,023	(22.76)	0.28

P-Preliminary

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

^{2/}Include castrated male and ready to bre

Figure 4. Distribution of Inventory by Age Classification, Philippines, as of January 1, 2013



- ❖ The total cattle inventory as of January 1, 2013 was 2,497,908 heads or 0.19 percent higher than last year's inventory of 2,493,157 heads.
- ❖ Of the total cattle population, cows accounted for about 43.24 percent. Yearlings shared 19.19 percent; heifers were 17.05 percent, while bulls and other age classifications accounted for 20.52 percent.



Table 1a. Inventory of Dairy Cattle by Age, as of January 1, 2011–2013
(Number of Head)

ANIMAL TYPE/AGE	2011	2012	2013P	Percent Change	
				12/11	13/12
CATTLE	17,405	19,292	21,067	10.84	9.20
Bull	643	722	791	12.29	9.56
Dam	7,951	8,563	9,627	7.70	12.43
Heifer	2,134	2,404	2,592	12.65	7.82
Yearling	3,104	3,575	3,771	15.17	5.48
Calf	3,573	4,028	4,286	12.73	6.41

P-Preliminary

- ❖ The total inventory of dairy cattle as of January 1, 2013 was 21,067 heads. This was 9.20 percent higher compared with last year's inventory of 19,292 heads.
- ❖ Of the total dairy cattle inventory, 45.70 percent were dams, 20.34 percent were calves, and 17.90 percent were yearlings. The rest were heifers and bulls which accounted for 12.30 percent and 3.75 percent of the total inventory, respectively.

TOP PRODUCING REGIONS

Table 2. Cattle Inventory of Top Producing Regions by Farm Type, as of January 1, 2013P
(Number of Head)

TOTAL (Backyard & Commercial)		BACKYARD		COMMERCIAL	
Region	Inventory	Region	Inventory	Region	Inventory
Ilocos Region	292,545	Ilocos Region	289,327	Bicol Region	32,745
Central Visayas	272,307	Central Visayas	269,034	Cagayan Valley	26,945
Northern Mindanao	271,700	Western Visayas	250,759	Northern Mindanao	23,548
Western Visayas	254,573	Northern Mindanao	248,152	SOCSSKARGEN	22,359
CALABARZON	253,376	CALABARZON	245,993	Central Luzon	20,012
Sub-Total	1,344,501		1,303,265		125,609
Others	1,153,407		1,020,096		48,938
Philippines	2,497,908		2,323,361		174,547
Percent Share					
Ilocos Region	11.71	Ilocos Region	12.45	Bicol Region	18.76
Central Visayas	10.90	Central Visayas	11.58	Cagayan Valley	15.44
Northern Mindanao	10.88	Western Visayas	10.79	Northern Mindanao	13.49
Western Visayas	10.19	Northern Mindanao	10.68	SOCSSKARGEN	12.81
CALABARZON	10.14	CALABARZON	10.59	Central Luzon	11.47
Sub-Total	53.83		56.09		71.96
Others	46.17		43.91		28.04
Philippines	100.00		100.00		100.00

P-Preliminary

- ❖ 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 56.09 percent to the total cattle inventory in the country.
- ❖ Ilocos Region had the highest share of 12.45 percent of the total backyard population. Bicol Region, on the other hand, accounted for the highest share at 18.76 percent of the total commercial cattle population in the country.



PRODUCTION

Table 3. Volume of Production, by Quarter, Philippines, 2010-2012 ❖
(in '000 m.t. liveweight)

QUARTER	2010	2011	2012	Percent Change	
				11/10	12/11
TOTAL	251.74	256.26	253.98	1.79	(0.89)
Jan-Mar	57.91	57.75	58.96	(0.28)	2.09
Apr-Jun	64.93	65.59	63.88	1.01	(2.60)
Jan-Jun	122.84	123.34	122.84	0.40	(0.41)
Jul-Sep	55.60	57.56	58.08	3.54	0.91
Oct-Dec	73.31	75.36	73.06	2.80	(3.05)
Jul-Dec	128.90	132.92	131.15	3.12	(1.34)

The total cattle production in 2012 was 253.98 thousand metric tons. It dropped by 0.89 percent from the previous year's production of 256.26 thousand metric tons.

❖ Compared to last year's record, cattle production grew by 2.09 percent and 0.91 percent on the 1st and 3rd quarters, respectively. It went down by 2.60 percent and 3.05 percent on the 2nd and 4th quarters, respectively.

MILK PRODUCTION

Table 4: Animals on the Milkline and Milk Production by Source
Philippines, 2011-2012

ANIMAL TYPE/SOURCE	2011		2012		Percent Change	
	Animals on the milkline	Production (LME* in '000 liters)	Animals on the milkline	Production (LME* in '000 liters)	12/11	
					Animals on the milkline	Production (LME* in '000 liters)
CATTLE	4,650	10,220.71	5,346	11,894.49	14.97	16.38
Individual	1,329	2,671.15	1,481	3,166.32	11.44	18.54
Cooperative	2,516	5,606.67	2,940	6,524.10	16.85	16.36
Commercial	393	1,134.47	438	1,250.66	11.45	10.24
Institutional	412	808.42	487	953.41	18.20	17.93

❖ In 2012, the total number of cattle on the milkline was 5,346 heads. This was 14.97 percent higher than last year's level of 4,650 heads.

❖ In 2012, the total production of cow's milk was approximately 11.89 million liters. This was up by 16.38 percent from last year's production of 10.22 million liters.

❖ Milk production from dairy cooperatives in 2012 shared 54.85 percent in the total cattle milk output. It was 16.36 percent higher than the 2011 level. Milk production from individual, commercial, and institutional dairy farms had respective contributions of 26.62 percent, 10.51 percent and 8.02 percent, to the total milk production.

Source: National Dairy Authority (NDA)

*LME- refers to Liquid Milk Equivalent



SUPPLY AND DISPOSITION

**Table 5. Supply and Disposition, Philippines, 2010-2012
(Number of live animals)**

ITEM	2010	2011	2012	Percent Change	
				11/10	12/11
TOTAL SUPPLY	3,403,771	3,361,342	3,386,730	(1.25)	0.76
Beginning Inventory	2,570,879	2,518,407	2,493,157	(2.04)	(1.00)
Born Live	816,826	820,912	866,014	0.50	5.49
Imports*	16,066	22,023	27,559	37.08	25.14
DISPOSITION	885,364	868,185	861,263	(1.94)	(0.80)
Slaughtered	830,720	836,224	830,957	0.66	(0.63)
Death/Losses	54,644	31,961	30,306	(41.51)	(5.18)
ENDING INVENTORY	2,518,407	2,493,157	2,525,467	(1.00)	1.30

P-Preliminary

* Source : Bureau of Animal Industry

- ❖ In 2012, the total supply of cattle was around 3.39 million heads, or 0.76 percent higher than the previous year's record. The increase in the supply of cattle was traced to the number of animals born live which went up by 5.49 percent.
- ❖ Total disposition of cattle in 2012 was 861.26 thousand head, down by 0.80 percent compared with last year's record. The number of cattle slaughtered for meat in 2012 decreased by 0.63 percent against the 2011 level.



IMPORTS

**Table 6. Beef : Volume and Value of Meat Imports*, by Quarter
Philippines, 2010-2012**

ITEM	2010	2011	2012	Percent Change	
				11/10	12/11
Volume (m.t.)	50,061.97	48,641.71	85,546.91	(2.84)	75.87
Jan-Mar	11,999.31	12,020.25	20,066.20	0.17	66.94
Apr-Jun	12,525.52	14,327.62	18,441.90	14.39	28.72
Jul-Sep	13,885.96	12,170.88	23,295.84	(12.35)	91.41
Oct-Dec	11,651.17	10,122.96	23,742.96	(13.12)	134.55
Value (FOB '000 US\$)	81,870.91	131,869.91	228,067.01	61.07	72.95
Jan-Mar	13,518.01	31,736.37	52,915.79	134.77	66.74
Apr-Jun	16,664.88	39,589.33	49,523.36	137.56	25.09
Jul-Sep	26,571.08	33,425.37	62,192.90	25.80	86.06
Oct-Dec	25,116.94	27,118.84	63,434.97	7.97	133.91

* Compiled by the Agricultural Marketing Statistics Analysis Division (AMSAD), BAS
Source of Basic Data: National Statistics Office (NSO)

- ❖ The volume of beef imports in 2012 was approximately 85.55 thousand metric tons valued at US\$ 228.07 million FOB. The volume and value of imports posted substantial growth rates of 75.87 percent and 72.95 percent, respectively, compared with 2011 level.
- ❖ The largest volume of imports was registered during the fourth quarter of 2012.

**Table 7. Cattle Imports by Classification,
Philippines, 2010-2012
(Number of Head)**

ITEM	2010	2011	2012	Percent Change	
				11/10	12/11
Breeder	910	1,537	2,813	68.90	83.02
Feeder	15,156	20,486	24,746	35.17	20.79
Total	16,066	22,023	27,559	37.08	25.14

❖ The total number of imported live cattle in 2012 was 27,559 heads. This was 25.14 percent higher in 2011 level. The importation of breeder stocks in 2012 increased by 83.02 percent compared to 2011 record.

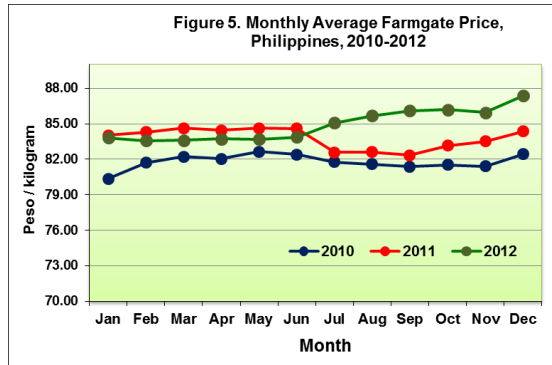
Source : Bureau of Animal Industry



PRICES

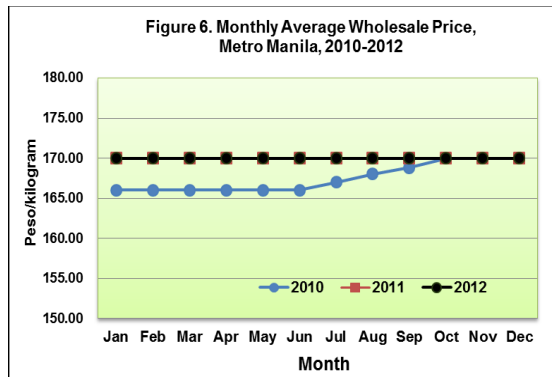
Farmgate Price

- ❖ The country's annual farmgate price per kilogram of live cattle in 2012 was P84.89 per kilogram. This was 1.35 percent higher than the 2011 price of P83.76 per kilogram.



Wholesale Price

- ❖ Metro Manila's annual average wholesale price of beef per kilogram (carcass weight) in 2012 was P170.00. There was no change from the previous year's annual average price.



Retail Price

- ❖ In 2012, the annual average retail price of beef rump was P229.41 per kilogram. It went up by 1.06 percent from the previous year's average retail price of P227.00 per kilogram. The highest retail price in 2012 was recorded during the month of December at P231.82 per kilogram and the lowest was in March at P226.98 per kilogram.

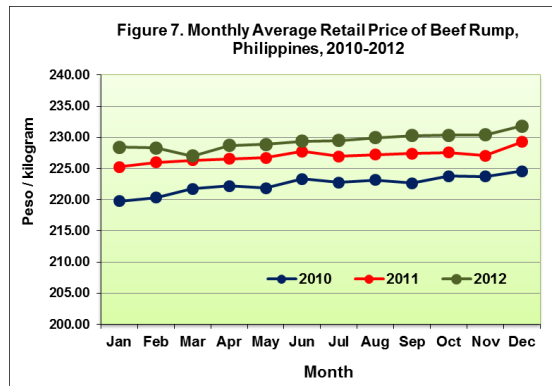




Table 8. Monthly Average Prices, by Market Level, Philippines and Metro Manila, 2010-2012

MONTH	Farmgate Price (P/KG) *				
	Philippines				
	2010	2011	2012	Percent Change	
				11/10	12/11
January	80.35	84.01	83.81	4.56	(0.24)
February	81.70	84.30	83.57	3.18	(0.87)
March	82.23	84.64	83.60	2.93	(1.23)
April	82.03	84.43	83.73	2.93	(0.83)
May	82.63	84.62	83.70	2.41	(1.09)
June	82.41	84.59	83.88	2.65	(0.84)
July	81.77	82.57	85.07	0.98	3.03
August	81.60	82.60	85.69	1.23	3.74
September	81.38	82.35	86.11	1.19	4.57
October	81.54	83.15	86.20	1.97	3.67
November	81.40	83.52	85.95	2.60	2.91
December	82.44	84.34	87.36	2.30	3.58
Annual Ave.	81.79	83.76	84.89	2.41	1.35
MONTH	Wholesale Price (P/KG.) *				
	Metro Manila				
	2010	2011	2012	Percent Change	
				11/10	12/11
January	166.00	170.00	170.00	2.41	0.00
February	166.00	170.00	170.00	2.41	0.00
March	166.00	170.00	170.00	2.41	0.00
April	166.00	170.00	170.00	2.41	0.00
May	166.00	170.00	170.00	2.41	0.00
June	166.00	170.00	170.00	2.41	0.00
July	167.00	170.00	170.00	1.80	0.00
August	168.00	170.00	170.00	1.19	0.00
September	168.80	170.00	170.00	0.71	0.00
October	170.00	170.00	170.00	0.00	0.00
November	170.00	170.00	170.00	0.00	0.00
December	170.00	170.00	170.00	0.00	0.00
Annual Ave.	167.50	170.00	170.00	1.49	0.00
MONTH	Retail Price (Beef Rump, P/Kg.) *				
	Philippines				
	2010	2011	2012	Percent Change	
				11/10	12/11
January	219.76	225.27	228.41	2.51	1.39
February	220.33	225.98	228.31	2.56	1.03
March	221.75	226.30	226.98	2.05	0.30
April	222.19	226.55	228.68	1.96	0.94
May	221.85	226.72	228.89	2.20	0.96
June	223.34	227.72	229.36	1.96	0.72
July	222.78	226.93	229.49	1.86	1.13
August	223.15	227.22	229.94	1.82	1.20
September	222.65	227.39	230.28	2.13	1.27
October	223.76	227.56	230.33	1.70	1.22
November	223.73	227.06	230.40	1.49	1.47
December	224.56	229.29	231.82	2.11	1.10
Annual Ave.	222.49	227.00	229.41	2.03	1.06

* Pesos per kilogram liveweight

Source: BAS-AMSAD



**Table 10 : Inventory in Backyard and Commercial Farms,
by Region, by Semester, Philippines, 2010-2013
(Number of Head)**

Region	2010		2011		2012		2013
	Jan 1	July 1	Jan 1	July 1	Jan 1	July 1	Jan 1
TOTAL							
PHILIPPINES	2,570,879	2,546,919	2,518,407	2,496,258	2,493,157	2,492,222	2,497,908
CAR	53,483	64,076	57,235	56,968	57,574	58,350	57,078
Ilocos Region	317,073	303,757	291,442	286,579	286,449	291,253	292,545
Cagayan Valley	197,541	191,211	191,660	186,699	182,196	180,010	177,152
Central Luzon	173,144	171,775	171,313	169,902	171,821	171,117	175,870
CALABARZON	255,253	251,365	250,927	251,678	251,744	252,935	253,376
MINAROPA	87,144	91,996	90,267	94,331	91,265	95,410	92,819
Bicol Region	68,759	73,012	73,779	77,150	81,233	85,725	91,254
Western Visayas	225,383	240,490	243,334	250,844	253,458	256,285	254,573
Central Visayas	275,207	271,078	273,311	271,183	273,562	272,198	272,307
Eastern Visayas	15,349	14,641	14,671	14,596	20,843	21,168	22,600
Zamboanga Peninsula	155,994	142,996	140,079	131,967	129,675	120,285	119,785
Northern Mindanao	281,442	279,480	278,426	276,339	272,711	273,089	271,700
Davao Region	140,144	136,330	138,175	136,326	136,540	136,407	134,455
SOCSSKARGEN	203,105	198,485	195,727	191,446	192,356	191,554	192,808
Caraga	18,097	19,113	18,828	18,833	19,034	20,203	20,312
ARMM	103,761	97,114	89,233	81,417	72,696	66,233	69,274
BACKYARD							
PHILIPPINES	2,403,296	2,370,903	2,343,975	2,325,567	2,321,655	2,317,991	2,323,361
CAR	45,778	52,275	49,932	49,495	49,056	50,340	49,386
Ilocos Region	313,269	299,430	287,559	282,947	282,977	287,891	289,327
Cagayan Valley	180,111	171,994	166,343	160,413	155,731	153,132	150,207
Central Luzon	153,260	152,111	151,571	150,491	152,336	150,955	155,858
CALABARZON	249,864	243,950	243,438	244,424	244,416	245,551	245,993
MINAROPA	77,273	80,549	78,762	82,856	79,779	83,399	80,592
Bicol Region	42,110	42,360	42,285	45,365	48,900	52,945	58,509
Western Visayas	221,318	236,860	239,730	247,372	249,672	252,410	250,759
Central Visayas	273,439	268,492	270,470	268,161	270,175	268,925	269,034
Eastern Visayas	11,302	11,453	12,249	12,045	17,929	18,326	18,991
Zamboanga Peninsula	155,633	142,245	139,393	131,217	128,853	119,489	118,995
Northern Mindanao	252,360	255,575	252,650	252,910	249,745	249,666	248,152
Davao Region	134,601	130,455	132,858	131,065	131,558	131,315	129,646
SOCSSKARGEN	172,832	169,321	170,664	169,036	171,085	169,449	170,449
Caraga	17,421	17,904	18,020	18,088	18,319	19,491	19,609
ARMM	102,725	95,929	88,051	79,682	71,124	64,707	67,854
COMMERCIAL							
PHILIPPINES	167,583	176,016	174,432	170,691	171,502	174,231	174,547
CAR	7,705	11,801	7,303	7,473	8,518	8,010	7,692
Ilocos Region	3,804	4,327	3,883	3,632	3,472	3,362	3,218
Cagayan Valley	17,430	19,217	25,317	26,286	26,465	26,878	26,945
Central Luzon	19,884	19,664	19,742	19,411	19,485	20,162	20,012
CALABARZON	5,389	7,415	7,489	7,254	7,328	7,384	7,383
MINAROPA	9,871	11,447	11,505	11,475	11,486	12,011	12,227
Bicol Region	26,649	30,652	31,494	31,785	32,333	32,780	32,745
Western Visayas	4,065	3,630	3,604	3,472	3,786	3,875	3,814
Central Visayas	1,768	2,586	2,841	3,022	3,387	3,273	3,273
Eastern Visayas	4,047	3,188	2,422	2,551	2,914	2,842	3,609
Zamboanga Peninsula	361	751	686	750	822	796	790
Northern Mindanao	29,082	23,905	25,776	23,429	22,966	23,423	23,548
Davao Region	5,543	5,875	5,317	5,261	4,982	5,092	4,809
SOCSSKARGEN	30,273	29,164	25,063	22,410	21,271	22,105	22,359
Caraga	676	1,209	808	745	715	712	703
ARMM	1,036	1,185	1,182	1,735	1,572	1,526	1,420

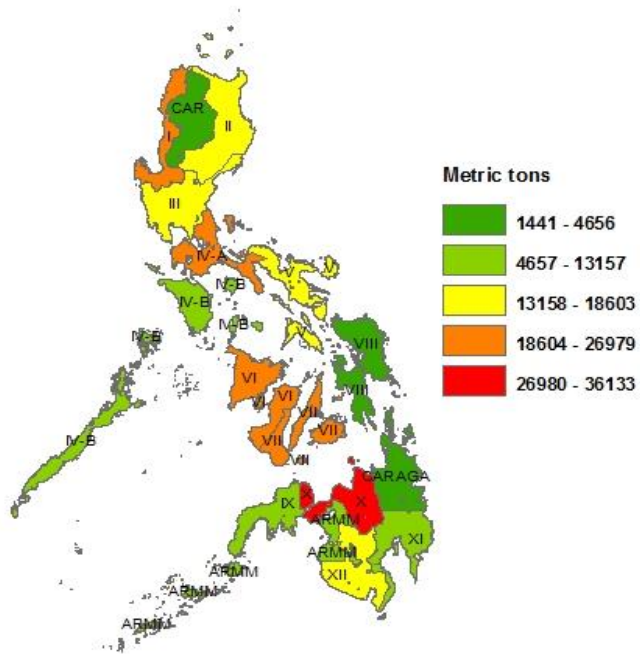
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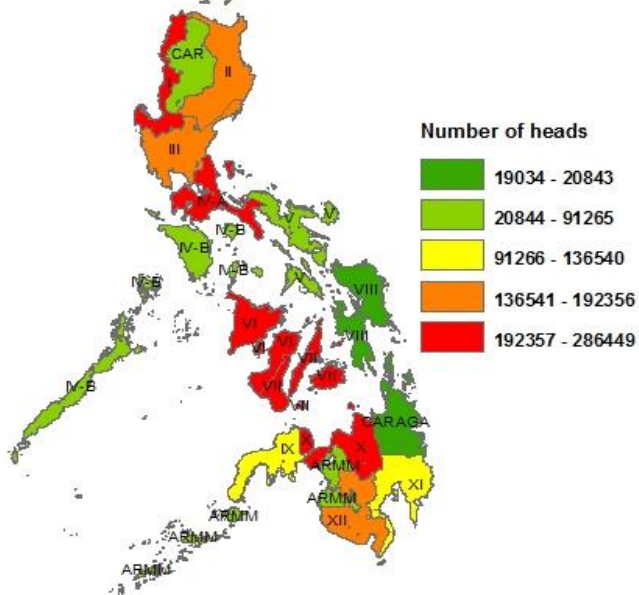
Table 10. Volume of Production by Region, by Quarter, Philippines, 2011-2012
(in '000 metric tons, liveweight)

Region	PRODUCTION									
	2011					2012				
	Q 1	Q 2	Q 3	Q 4	Annual	Q 1	Q 2	Q 3	Q 4	Annual
PHILIPPINES	57,750	65,588	57,561	75,359	256,258	58,957	63,881	58,083	73,062	253,983
LUZON	26,271	29,363	25,554	31,834	113,022	27,059	28,346	25,968	31,971	113,344
CAR	1,176	1,120	1,360	1,238	4,894	1,271	863	1,428	1,094	4,656
Ilocos Region	6,726	7,131	7,000	5,960	26,817	6,821	7,117	7,144	5,897	26,979
Cagayan Valley	3,692	3,281	3,380	3,210	13,563	3,700	3,167	3,533	3,712	14,112
Central Luzon	4,337	4,246	4,270	5,571	18,424	4,489	4,704	4,307	5,103	18,603
CALABARZON	4,669	8,896	3,832	7,233	24,630	5,040	7,978	4,078	7,098	24,194
MIMAROPA	2,236	2,081	2,125	4,555	10,997	2,327	2,067	2,106	4,366	10,866
Bicol Region	3,435	2,608	3,587	4,067	13,697	3,411	2,450	3,372	4,701	13,934
VISAYAS	11,233	10,152	12,379	14,489	48,253	11,434	10,460	12,135	15,240	49,269
Western Visayas	4,229	4,586	5,658	6,052	20,525	4,374	5,197	5,510	6,539	21,620
Central Visayas	6,335	4,837	6,140	8,022	25,334	6,440	4,630	6,035	8,277	25,382
Eastern Visayas	669	729	581	415	2,394	620	633	590	424	2,267
MINDANAO	20,246	26,073	19,628	29,036	94,983	20,464	25,075	19,980	25,851	91,370
Zamboanga Peninsula	3,962	2,065	3,577	4,249	13,853	3,900	2,081	3,756	3,420	13,157
Northern Mindanao	7,924	11,167	6,674	9,459	35,224	8,241	11,406	7,008	9,478	36,133
Davao Region	2,613	3,358	2,469	3,284	11,724	2,623	3,063	2,712	3,043	11,441
SOCCKSARGEN	3,504	5,129	4,314	6,327	19,274	3,574	5,158	4,106	5,740	18,578
Caraga	393	265	410	305	1,373	328	343	405	365	1,441
ARMM	1,850	4,089	2,184	5,412	13,535	1,798	3,024	1,993	3,805	10,620

Cattle Production, 2012



Cattle Inventory, As of January 1, 2012



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