

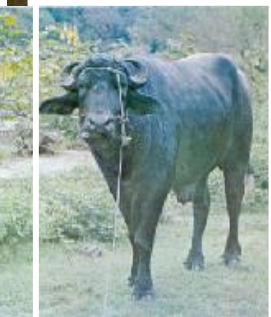
ISSN-2012-0664

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



# DAIRY INDUSTRY PERFORMANCE REPORT

January - December 2012



May 2013



## EXPLANATORY NOTES

The Dairy Industry Performance Report presents the industry situation in terms of total inventory of dairy animals by classification; milk production by animal type and by source; disposition of milk production, volume and value of dairy imports and exports.

The various dairy statistics used in this report are products of collaborative efforts of the Bureau of Agricultural Statistics (BAS), the National Dairy Authority (NDA) and the Philippine Carabao Center (PCC). BAS conducts the Semi-annual Survey of Dairy Enterprises in selected provinces where dairying exists. The survey is intended to generate data on inventory of dairy animals by type and breed, milk production of dairy animals by type and disposition. Systematic sampling is utilized in drawing samples for individual and backyard carabao dairy farms. Complete enumeration is applied on top producing dairy cooperatives, commercial farms, government-owned and private institutions, for all types of animals, i.e. cattle, carabao and goat.

The National Dairy Authority (NDA) provides BAS with data on inventory of dairy cattle and milk production generated from the monitoring records of their assisted dairy cooperatives. The Philippine Carabao Center (PCC) provides BAS with dairy data generated from the monitoring records of their assisted carabao dairy cooperatives and federations as well as from the institutional dairying activities of PCC Centers in selected regions and university campuses in the country, e.g., UP at Los Baños.

**TABLE OF CONTENTS**

Explanatory Notes	i
Table of Contents	ii
Highlights	iii
Inventory	1
Milk Production	2
Supply Utilization of Milk	3
Imports	
Volume and Value of Imports	3
Volume of Imports by Country of Origin	4
Exports	
Volume and Value of Exports	4
By Country of Destination	5
Prices	5
<b>Figures</b>	
1. Total Inventory of Dairy Animals by Type, Philippines, as of January 1, 2012-2013	iii
2. Milk Production by Animal Type, Philippines, 2011-2012	iii
3. Volume (in '000 m.t.) and Value (in Million US\$-CIF) of Dairy Imports, Philippines, 2011-2012	iii
4. Distribution of Dairy Inventory by Animal Type, Philippines, as of January 1, 2013	1
5. Distribution of Milk Production by Animal Type, Philippines, 2012	2
6. Volume of Exports by Country of Destination, Philippines, 2011-2012	5
<b>Statistical Tables</b>	
1. Total Inventory of Animals vis-à-vis Inventory of Dairy Animals by Type, Philippines, as of January 1, 2011-2013	1
2. Inventory of Dairy Animals by Animal Type and by Age Classification, Philippines, as of January 1, 2011-2013	1
3. Animals on the Milkline and Milk Production by Animal Type and Source, Philippines, 2010-2012	2
4. Supply Utilization of Milk, Philippines, 2010-2012	3
5. Volume and Value of Imports by Type of Dairy Products, Philippines, 2010-2012	3
6. Volume of Imports by Country of Origin, Philippines, 2010-2012	4
7. Volume and Value of Exports by Type of Dairy Products, Philippines, 2010-2012	4
8. Volume of Exports by Country of Destination, Philippines, 2010 – 2012	5
9. Average Price of Milk by Animal Type, Philippines, 2010– 2012	5

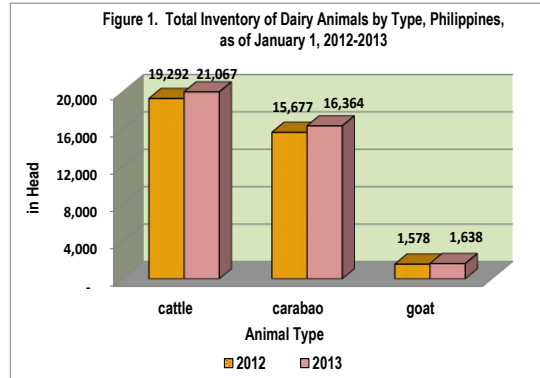
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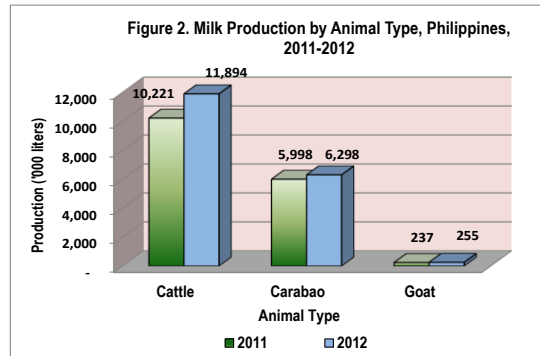


## HIGHLIGHTS

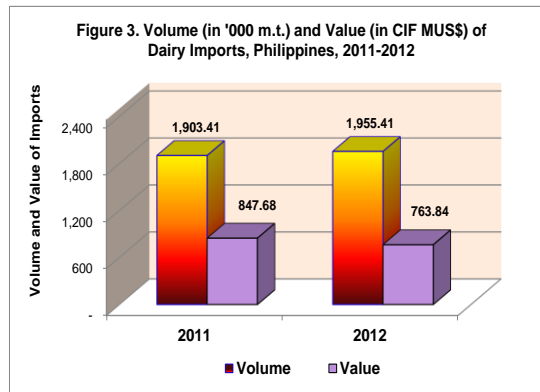
- ❖ As of January 1, 2013, the total dairy animal population was 39,069 heads. This was 6.90 percent higher than last year's headcount. Dairy cattle stocks grew by 9.20 percent. Dairy carabao and dairy goat population went up by 4.38 percent and 3.80 percent respectively.



- ❖ In 2012, milk production in the country was 18.4 million liters. This was 12.10 percent higher than last year's level of 16.4 million liters. Of this total, 11.9 million liters or 64.5 percent were cow's milk; 6.3 million liters or 34.1 percent were carabao's milk and 0.26 million liters or 1.4 percent were goat's milk.



- ❖ The volume of dairy imports in 2012 was 1,955.41 thousand metric tons. This was 2.73 percent higher than the 2011 level of 1,903.41 thousand metric tons. There was a decline of 9.89 percent in the value of dairy imports, from the 2011 level of US\$ 847.68 million to US\$ 763.84 million in 2012.





## INVENTORY

**Table 1. Total Inventory of Animals vis-à-vis Inventory of Dairy Animals by Type, Philippines, as of January 1, 2011-2013 (Number of Head)**

Animal Type	2011	2012	2013*	Percent Change	
<b>Total Cattle</b>	<b>2,518,407</b>	<b>2,493,157</b>	<b>2,497,908</b>	<b>(1.00)</b>	<b>0.19</b>
Dairy Cattle	17,405	19,292	21,067	10.84	9.20
<b>Total Carabao</b>	<b>3,075,259</b>	<b>2,963,980</b>	<b>2,912,842</b>	<b>(3.62)</b>	<b>(1.73)</b>
Dairy Carabao	14,681	15,677	16,364	6.78	4.38
<b>Total Goat</b>	<b>3,881,503</b>	<b>3,715,228</b>	<b>3,694,025</b>	<b>(4.28)</b>	<b>(0.57)</b>
Dairy Goat	1,356	1,578	1,638	16.37	3.80

\*- Preliminary

**Table 2. Inventory of Dairy Animals by Animal Type by Age Classification, Philippines, as of January 1, 2011-2013 (Number of Head)**

Animal Type/Age	2011	2012	2013	Percent Change	
				11/10	12/11
<b>TOTAL DAIRY</b>	<b>33,442</b>	<b>36,547</b>	<b>39,069</b>	<b>9.28</b>	<b>6.90</b>
<b>CATTLE</b>	<b>17,405</b>	<b>19,292</b>	<b>21,067</b>	<b>10.84</b>	<b>9.20</b>
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
<b>CARABAO</b>	<b>14,681</b>	<b>15,677</b>	<b>16,364</b>	<b>6.78</b>	<b>4.38</b>
Bull	998	1,032	1,067	3.41	3.39
Dam	7,421	7,863	8,287	5.96	5.39
Heifer	978	1,057	1,076	8.08	1.80
Yearling	1,973	2,102	2,210	6.54	5.14
Calf	3,311	3,623	3,724	9.42	2.79
<b>GOAT</b>	<b>1,356</b>	<b>1,578</b>	<b>1,638</b>	<b>16.37</b>	<b>3.80</b>
Buck	103	121	124	17.48	2.48
Doe	709	813	849	14.67	4.43
Kid	425	508	523	19.53	2.95
Others	119	136	142	14.29	4.41

\*- Preliminary

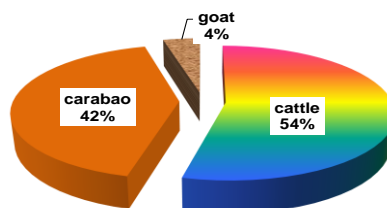
❖ In 2013, dairy cattle population was 0.84 percent of the total cattle population. Dairy carabao population was 0.56 percent and dairy goat population was less than 0.5 percent of the total carabao and goat population, respectively.

❖ As of January 1, 2013, the total inventory of dairy animals reached 39,069 heads. This was 6.90 percent higher than the previous year's level of 36,547 heads.

❖ There was 9.20 percent increase in dairy cattle population this year. Female breeders or dams accounted for 46 percent of the total dairy cattle which grew by 12.43 percent.

❖ In 2013, dairy carabao and dairy goat population grew by 4.38 percent and 3.80 percent, respectively.

**Figure 4. Distribution of Dairy Inventory by Animal Type, Philippines, as of January 1, 2013**





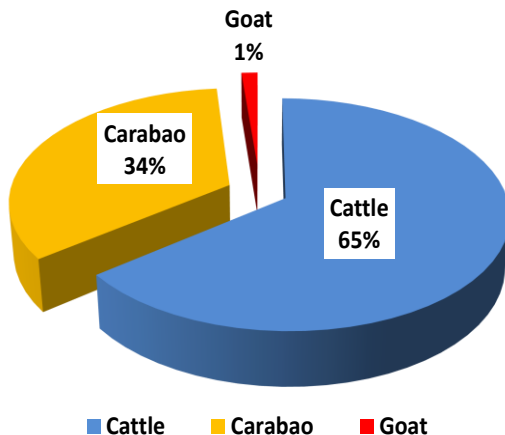
**MILK PRODUCTION**

**Table 3. Animals on the Milcline and Milk Production by Animal Type and Source, Philippines, 2010-2012**

Animal Type/Source	2010		2011		2012		Percent Change	
	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)	Animals on the Milcline	Production (LME* in '000 Liters)
<b>TOTAL</b>	<b>9,257</b>	<b>15,865.82</b>	<b>9,807</b>	<b>16,455.95</b>	<b>10,632</b>	<b>18,447.91</b>	<b>8.41</b>	<b>12.10</b>
<b>CATTLE</b>	<b>4,425</b>	<b>9,842.64</b>	<b>4,650</b>	<b>10,220.71</b>	<b>5,346</b>	<b>11,894.49</b>	<b>14.97</b>	<b>16.38</b>
Individual	1,343	2,292.85	1,329	2,671.15	1,481	3,166.32	11.44	18.54
Cooperatives	2,394	5,919.45	2,516	5,606.67	2,940	6,524.10	16.85	16.36
Commercial	362	1,080.24	393	1,134.47	438	1,250.66	11.45	10.24
Institutional	326	550.10	412	808.42	487	953.41	18.20	17.93
<b>CARABAO</b>	<b>4,435</b>	<b>5,798.21</b>	<b>4,694</b>	<b>5,997.82</b>	<b>4,781</b>	<b>6,297.98</b>	<b>1.85</b>	<b>5.00</b>
Individual	2,901	2,555.44	3,088	2,620.08	3,144	2,720.10	1.81	3.82
Cooperatives	813	1,507.53	847	1,554.93	863	1,691.20	1.89	8.76
Commercial	142	363.10	152	392.33	154	419.58	1.32	6.95
Institutional	579	1,372.14	607	1,430.48	620	1,467.10	2.14	2.56
<b>GOAT</b>	<b>397</b>	<b>224.97</b>	<b>463</b>	<b>237.42</b>	<b>505</b>	<b>255.44</b>	<b>9.07</b>	<b>7.59</b>

Note: LME\* - Liquid Milk Equivalent

**Figure 5. Distribution of Milk Production by Animal Type, Philippines, 2012**



- ❖ In 2012, total milk production in the country reached 18,448 thousand liters. It grew by 12.10 percent against last year's level of 16,456 thousand liters.
- ❖ Production of dairy cattle increased by 16.38 percent or from 10,221 thousand liters in 2011 to 11,895 thousand liters in 2012. Carabao milk production went up by 5.00 percent and dairy goat milk production grew by 7.59 percent.
- ❖ The total number of dairy animals on the milcline went up by 8.41 percent. Dairy cattle count increased by 14.97 percent. Dairy carabao and dairy goat on the milcline, likewise grew by 1.85 percent and 9.07 percent, respectively.



**SUPPLY UTILIZATION**

**Table 4. Supply and Utilization of Milk, Philippines, 2010-2012**  
(’000 m.t. - LME)

Particulars	2010	2011	2012	% Change	
				11/10	12/11
Local Production <sup>1/</sup>	15.86	16.46	18.45	10.06	12.10
Imports <sup>2/</sup>	2,015.02	1,903.41	1,955.41	(5.54)	2.73
Total supply	2,030.88	1,919.86	1,973.86	(5.47)	2.81
Exports <sup>2/</sup>	254.98	295.81	138.54	16.01	(53.17)
Net Domestic Supply	1,775.90	1,624.05	1,835.32	(8.55)	13.01
Human Population	94.01	95.81	97.64	1.91	1.91
Per Capita Supply (liters/year) <sup>3/</sup>	18.89	16.95	18.80	(10.27)	10.89

Source: National Dairy Authority (NDA)

<sup>1/</sup> Based on BAS survey converted to LME

<sup>2/</sup> NDA based on NSO data converted to LME

<sup>3/</sup> Derived using Net Domestic supply/Human Population

\* 1 liter of milk is approximately 1 kg of milk

LME- Liquid Milk Equivalent

❖ The total supply of milk in 2012 reached 1,973.86 thousand metric tons. It was 2.81 percent higher than the previous year’s level. More than 99 percent of the total milk supply were imported.

❖ The total dairy imports registered an increase of 2.73 percent in 2012. It rose from 1,903.41 thousand metric tons in 2011 to 1,955.41 thousand metric tons in 2012.

❖ In 2012, the net domestic supply of milk was 1,835.32 thousand metric tons. This was 13.01 percent higher than the domestic supply in 2011.

**IMPORTS**

**Table 5. Volume and Value of Imports by Type of Dairy Products, Philippines, 2010-2012**

Particulars	2010		2011		2012		% Change	
	Volume (’000 mt)	Value (CIF-MUS\$)	Volume (’000 mt)	Value (CIF-MUS\$)	Volume (’000 mt)	Value (CIF-MUS\$)	Volume 12/11	Value 12/11
<b>Total Import</b>	<b>2,015.02</b>	<b>729.03</b>	<b>1,903.41</b>	<b>847.68</b>	<b>1,955.41</b>	<b>763.84</b>	<b>2.73</b>	<b>(9.89)</b>
1. Milk and Cream	1,780.94	585.83	1,665.21	672.78	1,722.85	624.08	3.46	(7.24)
Skim Milk Powder	867.42	317.05	877.63	383.15	833.10	320.27	(5.07)	(16.41)
Wholemilk Powder	253.74	103.49	223.14	105.50	252.06	90.70	12.96	(14.03)
Buttermilk	153.63	49.09	159.92	66.76	195.82	64.76	22.45	(3.00)
Whey Powder	320.91	50.11	302.73	53.26	324.75	34.20	7.27	(35.79)
Liquid (RTD) Milk	48.48	45.31	45.80	47.35	34.73	75.60	(24.17)	59.66
Evaporated	1.04	0.38	0.66	0.48	1.86	1.22	181.82	154.17
Others*	135.72	20.40	55.33	16.28	80.53	37.33	45.54	129.30
2. Butter	169.31	93.75	162.51	106.54	140.47	64.66	(13.56)	(39.31)
3. Cheese	52.60	39.23	70.47	63.54	89.00	72.20	26.29	13.63
4. Curd	12.17	10.22	5.22	4.82	3.09	2.9	(40.80)	(39.83)

Source: National Dairy Authority (NDA) and National Statistics Office (NSO)

\* - includes Cream and Condensed Milk

❖ The total value of dairy imports in 2012 was US\$ 763.84 million. This was 9.89 percent lower than the 2011 imports of US\$ 847.68 million.

❖ Of the total milk imports, around 88 percent were classified under milk and cream and the rest were butter, cheese and curd.



**Table 6. Volume of Imports by Country of Origin  
Philippines, 2010-2012  
(In Liquid Milk Equivalent)**

Country Source	2010		2011		2012	
	Volume ('000 mt)	Percent Share	Volume ('000 mt)	Percent Share	Volume ('000 mt)	Percent Share
<b>TOTAL</b>	<b>2,015.02</b>	<b>100.00</b>	<b>1,903.41</b>	<b>100.00</b>	<b>1,955.41</b>	<b>100.00</b>
1. New Zealand	725.55	36.01	699.44	36.75	681.58	34.86
2. USA	502.81	24.95	513.45	26.98	607.14	31.05
3. Australia	225.27	11.18	179.86	9.45	190.62	9.75
4. Others	561.39	27.86	510.66	26.83	476.07	24.35

Source: National Dairy Authority (NDA)  
National Statistics Office (NSO)

❖ In 2012, New Zealand and USA were the leading sources of imported dairy products. They supplied a total of 1,288.72 thousand metric tons or 65.91 percent of the total dairy imports of the Philippines.

## EXPORTS

**Table 7. Volume and Value of Exports by Type of Dairy Products  
Philippines, 2010-2012**

Particulars	2010		2011		2012		% Change	
	Volume ('000 M.T.)	Value ('000 US\$)	Volume ('000 M.T.)	Value ('000 US\$)	Volume ('000 M.T.)	Value ('000 US\$)	11/10	12/11
<b>Total Exports</b>	<b>254.98</b>	<b>142.12</b>	<b>295.81</b>	<b>176.69</b>	<b>138.54</b>	<b>127.30</b>	<b>(53.17)</b>	<b>(27.95)</b>
Milk and Cream	249.95	138.14	291.01	173.44	135.82	124.81	(53.33)	(28.04)
Butter	0.11	0.04	0.25	0.10	0.07	0.07	(72.98)	(31.00)
Cheese	4.92	3.94	4.55	3.15	2.65	2.42	(41.69)	(23.30)

Source: National Dairy Authority (NDA)  
National Statistics Office (NSO)

❖ The total volume of dairy products exported by the Philippines in 2012 was 138.54 thousand metric tons. It was lower by 53.17 percent against previous year's record of 295.81 thousand metric tons. The total value dropped by 27.95 percent.

❖ In 2012, milk and cream comprised 98 percent of the total dairy exports. The rest were butter and cheese.

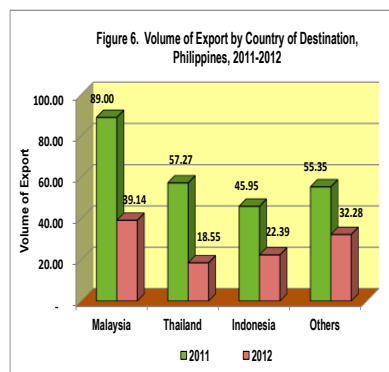




**Table 8. Volume of Exports by Country of Destination  
Philippines, 2010-2012  
(in '000 MT)**

Country Destination	2010		2011		2012	
	Volume (MT)	Percent Share	Volume (MT)	Percent Share	Volume (MT)	Percent Share
<b>Total</b>	<b>254.98</b>	<b>100.00</b>	<b>295.81</b>	<b>100.00</b>	<b>131.77</b>	<b>100.00</b>
Malaysia	73.13	28.68	89.00	30.09	39.14	29.71
Thailand	63.67	24.97	57.27	19.36	18.55	14.08
Indonesia	38.00	14.90	45.95	15.53	22.39	16.99
Bangladesh	30.17	11.83	38.30	12.95	19.42	14.73
Vietnam			9.95	3.36	-	-
Others	50.01	19.61	55.35	18.71	32.28	24.49

Source: National Dairy Authority (NDA)  
National Statistics Office (NSO)



- ❖ In 2012, the main countries of destination for dairy products from the Philippines were Malaysia, Thailand and Indonesia. Malaysia and Indonesia accounted for 47 percent of the total volume of the Philippine exports.

## PRICES

**Table 9. Average Farmgate Price of Milk by Animal Type,  
Philippines, 2010-2012  
(Peso per liter)**

Animal Type	2010	2011	2012	Percent Change	
				11/10	12/11
Cattle <sup>1/</sup>	22.00	22.00	22.50	-	2.27
Carabao <sup>2/</sup>	45.00	46.00	46.00	2.22	-
Goat <sup>3/</sup>	35.00	35.00	35.00	-	-

<sup>1/</sup> NDA as reported by cooperatives

<sup>2/</sup> PCC as reported by Institutional centers

<sup>3/</sup> Based on BAS Dairy Semestral Survey

- ❖ In 2012, the annual average farmgate prices per liter of raw milk from three (3) dairy animal sources were Php 22.50 for cattle, Php 46.00 for carabao and Php 35.00 for goat, respectively.

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