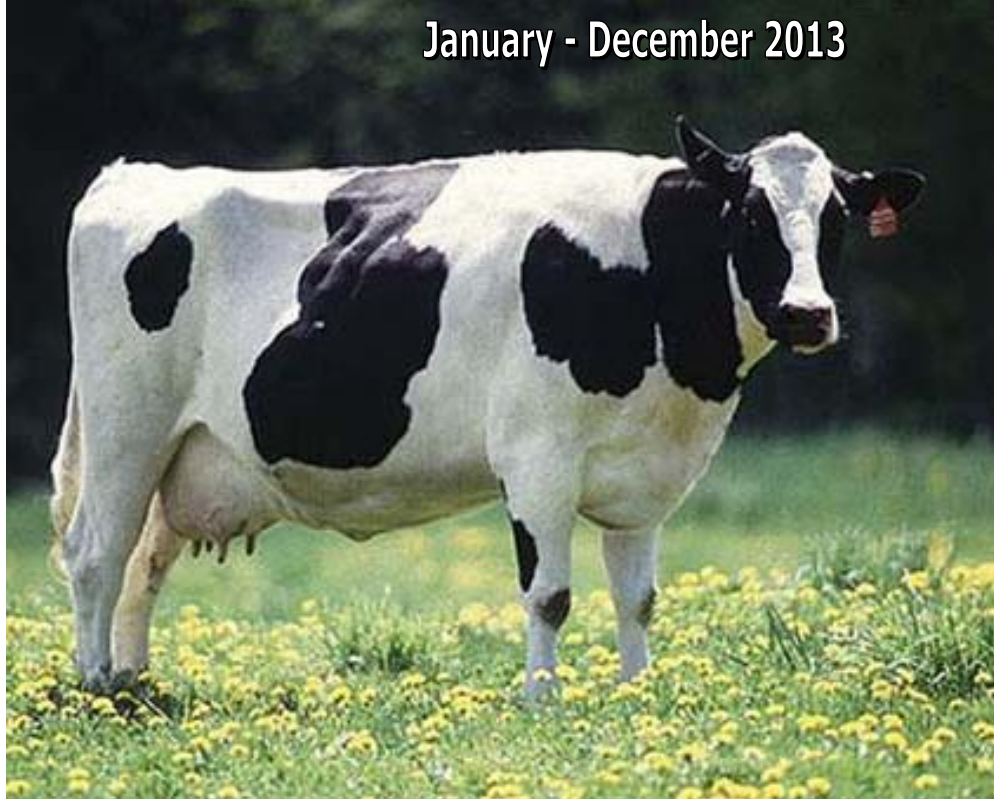




Republic of the Philippines
PHILIPPINE STATISTICS AUTHORITY
BUREAU OF AGRICULTURAL STATISTICS
Quezon City

DAIRY INDUSTRY PERFORMANCE REPORT

January - December 2013



May 2014



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, total supply and utilization of dairy products; and volume and value of dairy imports and exports.

The various dairy statistics used in this report are products of collaborative efforts between and among the Philippine Statistics Authority-Bureau of Agricultural Statistics (PSA-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 employed 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 PSA-BAS with data on inventory of dairy cattle and milk production generated from the monitoring records of NDA-assisted dairy cooperatives. The Philippine Carabao Center (PCC) provides BAS with dairy data generated from the monitoring records of the PCC-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. University of the Philippines at Los Baños.



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HIGHLIGHTS

❖ As of January 1, 2014, the total dairy animal population was 40,322 head. This was 3.21 percent higher than last year's headcount. Dairy cattle stocks grew by 2.55 percent. Dairy carabao and dairy goat population went up by 2.84 percent and 15.26 percent respectively.

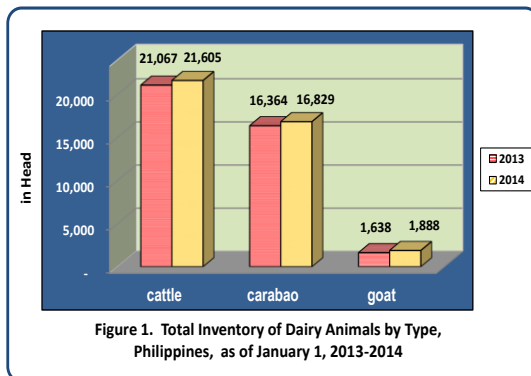


Figure 1. Total Inventory of Dairy Animals by Type, Philippines, as of January 1, 2013-2014

❖ In 2013, milk production in the country was 19.5 million liters. This was 5.59 percent higher than last year's level of 18.5 million liters. Of this total, 12.7 million liters or 65.0 percent were cow's milk; 6.6 million liters or 33.6 percent were carabao's milk and 0.28 million liters or 1.4 percent were goat's milk.

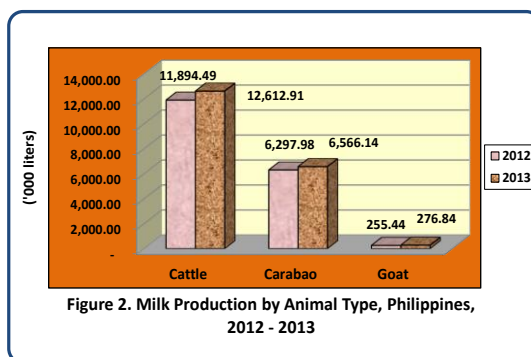


Figure 2. Milk Production by Animal Type, Philippines, 2012 - 2013

❖ The volume of dairy imports in 2013 was 1,945.69 thousand metric tons. This was 0.50 percent lower than the 2012 level of 1,955.41 thousand metric tons. There was an increase of 12.22 percent in the value of dairy imports, from the 2012 level of US\$ 763.84 million to US\$ 857.19 million in 2012.

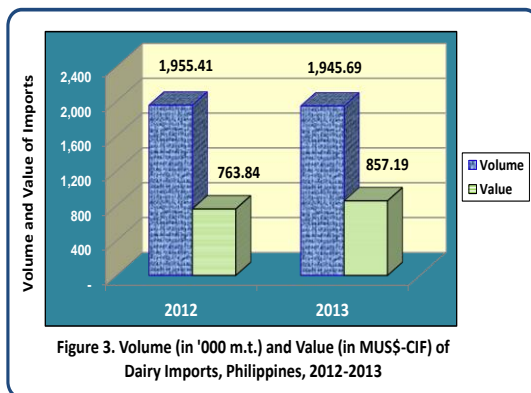


Figure 3. Volume (in '000 m.t.) and Value (in MUS\$-CIF) of Dairy Imports, Philippines, 2012-2013



INVENTORY

Table 1. Total Inventory of Animals vis-à-vis Inventory of Dairy Animals by Type, Philippines, as of January 1, 2012-2014 (Number of Head)

Animal Type	2012	2013	2014	Percent Change	
				13/12	14/13
Total Cattle	2,493,157	2,497,908	2,504,641	0.19	0.27
Dairy Cattle	19,292	21,067	21,605	9.20	2.55
Total Carabao	2,963,980	2,912,842	2,844,149	(1.73)	(2.36)
Dairy Carabao	15,677	16,364	16,829	4.38	2.84
Total Goat	3,715,228	3,694,026	3,690,789	(0.57)	(0.09)
Dairy Goat	1,578	1,638	1,888	3.80	15.26

*- Preliminary

Table 2. Inventory of Dairy Animals by Animal Type by Age Classification, Philippines, as of January 1, 2012-2014 (Number of Head)

Animal Type/Age	2012	2013	2014P	Percent Change	
				13/12	14/13
TOTAL DAIRY	36,547	39,069	40,322	6.90	3.21
CATTLE	19,292	21,067	21,605	9.20	2.55
Bull	722	791	863	9.56	9.10
Dam	8,563	9,686	9,831	13.11	1.50
Heifer	2,404	2,592	2,678	7.82	3.32
Yearling	3,575	3,712	3,856	3.83	3.88
Calf	4,028	4,286	4,377	6.41	2.12
CARABAO	15,677	16,364	16,829	4.38	2.84
Carabull	1,032	1,067	1,102	3.39	3.28
Dam	7,863	8,287	8,501	5.39	2.58
Caraheifer	1,057	1,076	1,112	1.80	3.35
Yearling	2,102	2,210	2,292	5.14	3.71
Caracalf	3,623	3,724	3,822	2.79	2.63
GOAT	1,578	1,638	1,888	3.80	15.26
Buck	121	124	143	2.48	15.32
Doe	813	849	976	4.43	14.96
Kid	508	523	607	2.95	16.06
Others	136	142	162	4.41	14.08

*- Preliminary

❖ In 2014, dairy cattle population was 21,605 head or 0.86 percent of the country's total cattle population. Dairy carabao population stood at 16,829 head and dairy goat population reached 1,888 head or 0.59 percent and 0.05 percent of the total carabao and total goat population, respectively.

❖ As of January 1, 2014, the total inventory of dairy animals reached 40,322 head. This was 3.21 percent higher than the previous year's level of 39,069 head.

❖ There was 2.55 percent increase in dairy cattle population this year. Female breeders or dams accounting for 46 percent of the total dairy cattle grew by 1.50 percent.

❖ In 2014, dairy carabao and dairy goat population grew by 2.84 percent and 15.26 percent, respectively.

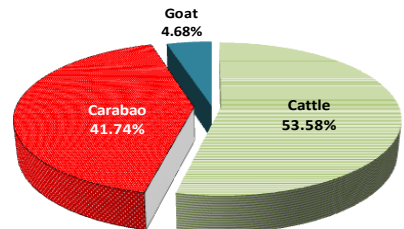


Figure 4. Distribution of Dairy Inventory by Animal Type, Philippines as of January 1, 2014



MILK PRODUCTION

Table 3. Animals on the Milkline and Milk Production by Animal Type and Source, Philippines, 2011-2013

Animal Type/Source	2011		2012		2013		% Change (13/12)	
	Animals on the Milkline	Production (LME* in '000 Liters)	Animals on the Milkline	Production (LME* in '000 Liters)	Animals on the Milkline	Production (LME* in '000 Liters)	Animals on the Milkline	Production (LME* in '000 Liters)
TOTAL	9,807	16,455.95	10,835	18,492.60	11,937	19,526.42	10.17	5.59
CATTLE	4,650	10,220.71	5,431	11,939.18	5,681	12,683.44	4.60	6.23
Cooperatives	2,516	5,606.67	2,560	6,013.11	2,054	4,999.27	(19.77)	(16.86)
Gov't-Owned-Institutional	412	808.42	224	457.90	353	553.16	57.59	20.80
Commercial/Private	393	1,134.47	1,118	2,893.86	1,223	2,878.02	9.39	(0.55)
Dairy Multiplier Farms	1,329	2,671.15	1,529	2,574.31	2,051	4,252.99	34.14	65.21
CARABAO	4,694	5,997.82	4,781	6,297.98	4,884	6,566.14	2.15	4.26
Cooperatives	847	1,554.93	863	1,691.20	886	1,850.21	2.67	9.40
Gov't-Owned-Institutional	607	1,430.48	620	1,467.10	636	1,496.69	2.58	2.02
Commercial/Private	152	392.33	154	419.58	162	447.45	5.19	6.64
Individual	3,088	2,620.08	3,144	2,720.10	3,200	2,771.79	1.78	1.90
GOAT	463	237.42	623	255.44	1,372	276.84	120.22	8.38

Note: LME* - Liquid Milk Equivalent

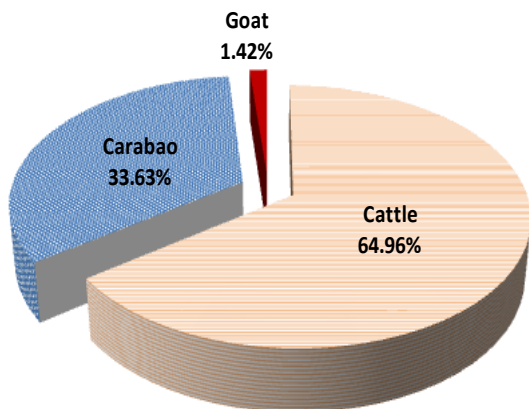


Figure 5. Distribution of Milk Production by Animal Type, Philippines, 2013

- ❖ In 2013, total milk production in the country reached 19,526 thousand liters. It grew by 5.59 percent against last year's level of 18,492 thousand liters.
- ❖ Production of dairy cattle increased by 6.23 percent or from 11,939 thousand liters in 2012 to 12,683 thousand liters in 2013. Carabao milk production went up by 4.26 percent and dairy goat milk production grew by 8.38 percent.
- ❖ The total number of dairy animals on the milkline went up by 10.17 percent. Dairy cattle count increased by 4.60 percent. Dairy carabao and dairy goat on the milkline, grew by 2.15 percent and 120.22 percent, respectively.



SUPPLY- UTILIZATION OF MILK

Table 4. Supply and Utilization of Milk, Philippines, 2011-2013
(’000 m.t. - LME)

Particulars	2011	2012	2013	% Change	
				12/11	13/12
Local Production ^{1/}	16.46	18.45	19.46	12.10	5.49
Imports ^{2/}	1,903.41	1,955.41	1,945.69	2.73	(0.50)
Total supply	1,919.86	1,973.86	1,965.15	2.81	(0.44)
Exports ^{2/}	295.81	132.24	48.52	(55.30)	(63.31)
Net Domestic Supply	1,624.05	1,841.62	1,916.63	13.40	4.07
Human Population	95.81	96.18	98.01	0.39	1.90
Per Capita Supply (liters/year) ^{3/}	16.95	19.15	19.56	12.96	2.13

Source: National Dairy Authority (NDA)

^{1/} NDA and PSA-BAS survey converted to LME

^{2/} NDA based on PSA-NSO data converted to LME

^{3/} 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 2013 reached 1,965.15 thousand metric tons or 0.44 percent lower than the previous year’s level. More than 99 percent of the total milk supply were imported.

❖ The total dairy imports registered a decline of 0.50 percent in 2013. It dropped from 1,955.41 thousand metric tons in 2012 to 1,945.69 thousand metric tons in 2013.

❖ In 2013, the net domestic supply of milk was 1,916.63 thousand metric tons. This was 4.07 percent higher than the net domestic supply in 2012.

IMPORTS

Table 5. Volume and Value of Imports by Type of Dairy Products, Philippines, 2011-2013

Particulars	2011		2012		2013		% Change	
	Volume ('000 mt)	Value (MUS\$-CIF)	Volume ('000 mt)	Value (MUS\$-CIF)	Volume ('000 mt)	Value (MUS\$-CIF)	Volume 2013/12	Value 2013/12
Total Import	1,903.41	847.68	1,955.41	763.84	1,945.69	857.19	(0.50)	12.22
1. Milk and Cream	1,665.21	672.78	1,722.85	624.08	1,752.51	728.75	1.72	16.77
Skim Milk Powder	877.63	383.15	833.10	320.27	887.38	423.85	6.52	32.34
Wholemilk Powder	223.14	105.50	252.06	90.70	205.65	74.14	(18.41)	(18.26)
Buttermilk	159.92	66.76	195.82	75.60	175.31	82.80	(10.47)	9.52
Whey Powder	302.73	53.26	324.75	64.76	338.18	69.52	4.14	7.35
Liquid (RTD) Milk	45.80	47.35	34.73	34.20	47.51	49.83	36.80	45.70
Evaporated	0.66	0.48	1.86	1.22	0.31	0.19	(83.33)	(84.43)
Others*	55.33	16.28	80.53	37.33	98.17	28.42	21.90	(23.87)
2. Butter	162.51	106.54	140.47	64.66	125.43	69.94	(10.71)	8.17
3. Cheese	70.47	63.54	89.00	72.20	64.21	55.12	(27.85)	(23.66)
4. Curd	5.22	4.82	3.09	2.9	3.54	3.38	14.56	16.55

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

* - includes Cream and Condensed Milk

❖ The total value of dairy imports in 2013 was US\$ 857.19 million. This was 12.22 percent higher than the 2012 imports of US\$ 763.84 million.

❖ Of the total milk imports, around 90 percent were classified under milk and cream while the rest were butter, cheese and curd.



**Table 6. Volume of Imports by Country of Origin
Philippines, 2011-2013
(in '000 MT)**

Country Source	2011		2012		2013	
	Volume ('000 mt)	Percent Share	Volume ('000 mt)	Percent Share	Volume ('000 mt)	Percent Share
TOTAL	1,903.41	100.00	1,955.41	100.00	1,945.69	100.00
1. New Zealand	699.44	36.75	681.58	34.86	617.59	31.74
2. USA	513.45	26.98	607.14	31.05	621.29	31.93
3. Australia	179.86	9.45	190.62	9.75	125.51	6.45
4. Others	510.66	26.83	476.07	24.35	581.30	29.88

❖ In 2013, New Zealand and USA were the leading suppliers of the country's dairy products. They supplied a total of 1,238.88 thousand metric tons or 63.60 percent of the total dairy imports of the Philippines.

Source: National Dairy Authority (NDA)

Philippine Statistics Authority-National Statistics Office (PSA-NSO)

EXPORTS

**Table 7. Volume and Value of Exports by Type of Dairy Products
Philippines, 2011-2013
(In Liquid Milk Equivalent)**

Particulars	2011		2012		2013		% Change	
	Volume ('000 M.T.)	Value ('000 US\$)	Volume ('001 M.T.)	Value ('000 US\$)	Volume ('000 M.T.)	Value ('000 US\$)	13/12	13/12
Total Exports	295.81	176.69	132.24	82.86	48.52	55.11	(63.31)	(33.49)
Milk and Cream	291.01	173.44	129.52	80.37	43.97	48.88	(66.05)	(39.18)
Butter	0.25	0.10	0.07	0.07	0.05	0.17	(28.57)	142.86
Cheese	4.55	3.15	2.65	2.42	4.33	5.88	63.40	143.38
Curd	-	-	-	-	0.17	0.18		

❖ The total volume of dairy products exported by the Philippines in 2013 was 48.52 thousand metric tons. It was lower by 63.31 percent against previous year's record of 132.24 thousand metric tons. The total value dropped by 33.49 percent.

❖ In 2013, milk and cream comprised 91 percent of the total dairy exports. The rest were butter and cheese.

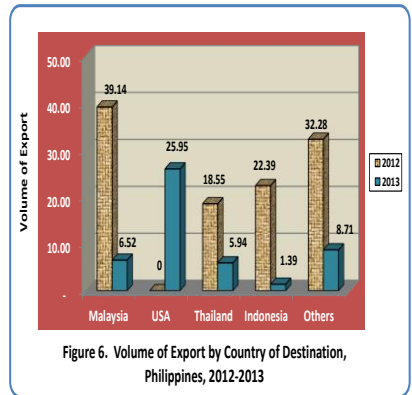
Source: National Dairy Authority (NDA)

Philippine Statistics Authority-National Statistics Office (PSA-NSO)



**Table 8. Volume of Exports by Country of Destination
Philippines, 2011-2013
(in '000 MT)**

Country Destination	2011		2012		2013	
	Volume (MT)	Percent Share	Volume (MT)	Percent Share	Volume (MT)	Percent Share
Total	295.81	100.00	131.77	100.00	48.52	43.30
USA					25.95	
Malaysia	89.00	30.09	39.14	29.71	6.52	13.43
Thailand	57.27	19.36	18.55	14.08	5.94	12.25
Indonesia	45.95	15.53	22.39	16.99	1.39	2.86
Bangladesh	38.30	12.95	19.42	14.73	-	-
Vietnam	9.95	3.36	-	-	-	-
Iraq					1.55	
Others	55.35	18.71	32.28	24.49	7.16	14.76



Source: National Dairy Authority (NDA)
Philippine Statistics Authority-National Statistics Office (PSA-NSO)

- ❖ In 2013, 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 dairy exports.

PRICES

**Table 9. Average Farmgate Price of Milk by Animal Type,
Philippines, 2011-2013
(Peso per liter)**

Animal Type	2011	2012	2013	Percent Change	
				12/11	13/12
Cattle ^{1/}	22.00	22.50	22.50	2.27	-
Carabao ^{2/}	46.00	46.00	46.00	-	-
Goat ^{3/}	35.00	35.00	35.00	-	-

^{1/} NDA as reported by cooperatives

^{2/} PCC as reported by Institutional centers

^{3/} Based on BAS Dairy Semestral Survey

- ❖ In 2013, the annual average farmgate prices per liter of raw milk from three (3) dairy animal sources remained stable at Php 22.50 for cattle, Php 46.00 for carabao, and Php 35.00 for goat, respectively.

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