

Required Report: Required - Public Distribution

Date: March 24, 2022

Report Number: RP2022-0015

Report Name: Grain and Feed Annual

Country: Philippines

Post: Manila

Report Category: Grain and Feed

Prepared By: Lary Nel Abao

Approved By: Ryan Bedford

Report Highlights:

FAS Manila forecasts Market Year (MY) 2022/23 milled rice production will reach 12.4 million metric tons (MT), flat with the previous year's near-record high. The Philippine government's support programs will help rice farmers partially offset rising input costs. Rice imports are seen at 2.8 million MT, 200,000 MT lower than MY 2021/22. Post forecasts MY 2022/23 wheat imports declining 3 percent to 6.3 million MT, as the Ukraine conflict results in rising prices and supply challenges. Corn is expected to supplement some feed wheat demand, while milling wheat consumption is seen slightly declining for more affordable rice. Corn production in MY 2022/23 is forecast at 8.3 million MT, rebounding from the previous year's lower level. Post forecasts MY 2022/23 corn imports at 750,000 MT, as feed wheat prices are elevated by the Ukraine conflict.

Executive Summary

FAS Manila forecasts Market Year (MY) 2022/23 milled rice production will reach 12.4 million MT, flat with the previous year's near record high. The Philippine Department of Agriculture's (DA's) next phase of the [Plant, Plant, Plant program](#) combined with other support programs will help rice farmers with rising input costs. Rice imports are seen at 2.8 million MT, 200,000 MT lower than MY 2021/22.

Rising prices and supply issues due to conflict in the Black Sea are expected to affect wheat imports, which Post forecasts at 6.3 million MT in MY 2022/23. Corn is expected to supplement some feed wheat demand, while milling wheat consumption is seen slightly declining for more affordable rice.

Post expects MY 2022/23 corn imports will rise 50,000 MT to 750,000 MT, as feed wheat prices are elevated by the Ukraine conflict. Corn production in MY 2022/23 is forecast to 8.3 million MT, rebounding after the previous year's subpar growing conditions in 3 out of the 5 top corn regions. Despite rising corn demand from the poultry sector, growth is tempered by the higher cost of fertilizers.

FAS Manila forecasts MY 2022/23 sorghum imports at 30,000 MT in response to steady demand. Meanwhile, the recent rise in barley imports is expected to continue, with 700,000 MT seen in MY 2022/23 because of high feed wheat prices necessitating alternative energy sources.

Table 1: Total Energy Table (in Corn Equivalent) for Feed Ingredients (1000 MT)			
Energy Sources	MY 2020/21	MY 2021/22	MY 2022/23
Corn	6,800	6,800	6,900
Wheat	2,375	2,375	2,280
Cassava	725	696	668
Barley	110	720	700
Sorghum	32	24	30
Total Grains	10,042	10,515	10,578
Growth rate		4.7%	0.6%

Source: FAS PS&D and Post estimates

Note: Feed wheat and sorghum were converted to corn energy equivalent at 95 percent and barley at 100 percent. For cassava, the corn energy equivalent conversion rate is 50 percent.

Table 2: Pork, Poultry, and Aquaculture Production (1000 MT)			
Commodity	MY 2020/21	MY 2021/22	MY 2022/23
Pork (CWE)	1,060	1,010	1,010
Chicken	1,317	1,344	1,373
Eggs	629	641	635
Milkfish, Tilapia, and Shrimp	748	763	778
Total	3,754	3,758	3,796
Growth rate		0%	1%

Source: FAS PS&D (pork and chicken); PSA (eggs and aquaculture); Post (cassava and barley)

Rice

Production, Supply, and Distribution

Table 3

Rice, Milled Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Philippines						
Area Harvested (1000 HA)	4762	4762	4800	4800	0	4800
Begin. Stocks (1000 MT)	3597	3597	3763	3763	0	4213
Milled Product. (1000 MT)	12416	12416	12400	12400	0	12400
Rough Product. (1000 MT)	19708	19708	19683	19683	0	19683
Milling Rate (percent)	63	63	63	63	0	63
MY Imports (1000 MT)	2200	2200	3000	3000	0	2800
TY Imports (1000 MT)	2950	2950	2900	2900	0	2800
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	18213	18213	19163	19163	0	19413
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Cons. and Res. (1000 MT)	14450	14450	14950	14950	0	15300
Ending Stocks (1000 MT)	3763	3763	4213	4213	0	4113
Total Distrib. (1000 MT)	18213	18213	19163	19163	0	19413
Yield (Rough) (MT/HA)	4.1386	4.1386	4.1006	4.1006	0	4.1006

(1000 HA), (1000 MT), (MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2022/2023 = January 2023 - December 2023

Production

FAS Manila forecasts rice production will reach 12.4 million MT in MY 2022/23 (July/June), flat with the previous year. The Department of Agriculture (DA) has launched the Plant, Plant, Plant Program Part 2, with one of its goals to boost palay (paddy rice) production. DA promotes the establishment of provincial [hybrid rice](#) cluster farms and also implements [fertilizer subsidies](#) and [cash assistance](#) to encourage rice production. The government provides hybrid and inbred rice subsidies to farmers, in addition to fertilizer assistance and soil ameliorants. The support provided to farmers will only partially offset the sharp rise in input costs that is compounded by the Ukraine conflict.

On December 16, 2021, Super Typhoon Rai (local name Odette) swept through the Visayas and Mindanao, damaging approximately 115,000 hectares of rice farms and causing nearly 140,000 MT of

lost rice. Post leaves MY 2021/22 rice production unchanged at 1.24 million MT, however, as the initial forecast incorporates some loss from typhoon damages.

Rice is critical to Philippine food security and farmer incomes, representing over 40 percent of the total value of Philippine crops in 2021 according to the [Philippine Statistics Authority](#). As a politically sensitive crop, it is also the most heavily supported Philippine agricultural commodity. Industry contacts estimate the de facto subsidy to the rice industry to be around P63 billion (\$1.26 billion) based on the government budgets of National Irrigation Administration (P31 billion or \$620 million), Department of Agriculture Rice Program (P15 billion or \$300 million), Rice Competitiveness Enhancement Fund (P10 billion or \$200 million), and National Food Authority (P7 billion or \$140 million).

The palay farm gate price is the main consideration in planting rice. Industry contacts notes that pest and disease are not major issues. Although in some areas, black bug and bacterial blight cause limited damages. The main constraint in Philippine rice production is the lack of investment, such as in post-harvest equipment and mechanical dryers. Farmers usually dry newly harvested rice on pavement.

The Philippine Rice Research Institute (PhilRice) and private companies continually develop hybrid seeds to further increase yield. Fertilizer is a major input in rice production. Pesticides are only used as needed and normally pre-positioned at DA Regional Field offices. Unlike with corn, rice farmers do not have genetically engineered options to reduce input costs, although the [approval of Golden Rice](#) and recently [streamlined biotechnology regulations](#) may lead to access to such climate-smart tools in the future.

Figure 1 (Normalized Difference Vegetation Index Anomaly) shows better crop conditions for MY 20/21 than MY 2021/22 in the top rice producing region of Central Luzon.

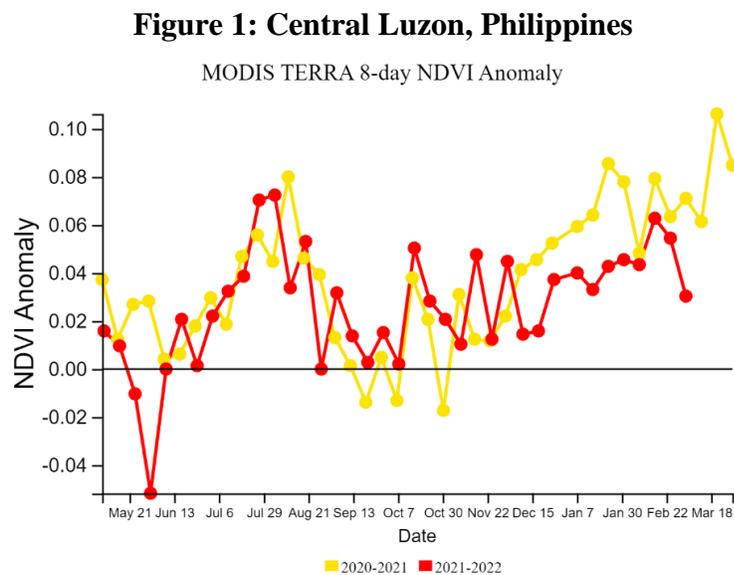
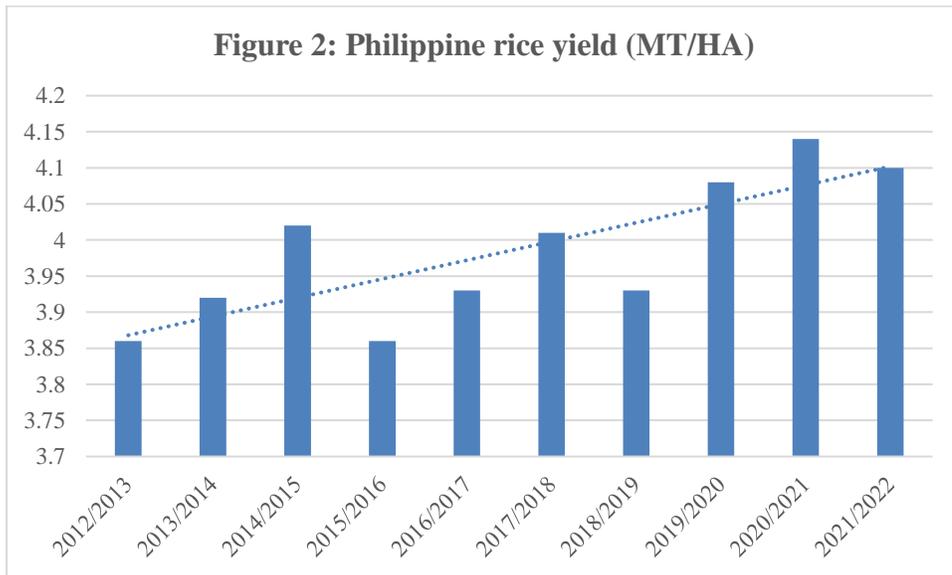


Table 4: Philippine Rice Production by Region
Metric Tons

Region	MY 2019/20	MY 2020/21	MY 2020/21 July to Dec	MY 2021/22 July to Dec	%Δ
Philippines	18,932,127	19,708,039	10,908,179	11,160,311	2%
Central Luzon	3,638,014	3,609,803	1,869,069	2,000,476	7%
Cagayan Valley	2,685,653	2,827,675	1,240,481	1,322,757	7%
Western Visayas	2,159,470	2,360,348	1,541,748	1,538,302	0%
Ilocos Region	1,857,298	1,917,121	1,407,774	1,392,996	-1%
Bicol Region	1,254,189	1,320,280	663,319	689,992	4%
MIMAROPA	1,241,761	1,200,276	699,926	724,933	4%
SOCCSKSARGEN	1,212,094	1,270,350	781,706	789,544	1%
Eastern Visayas	917,605	836,925	382,723	410,172	7%
Northern Mindanao	764,642	797,798	462,572	458,414	-1%
ARMM	686,185	841,797	441,163	444,320	1%
Zamboanga Peninsula	651,093	679,141	394,288	382,502	-3%
Davao Region	452,841	469,775	246,640	261,590	6%
Caraga	439,153	498,954	216,542	185,331	-14%
CALABARZON	388,841	397,828	170,062	182,149	7%
CAR	374,371	380,840	232,811	229,104	-2%
Central Visayas	208,916	299,129	157,357	147,730	-6%

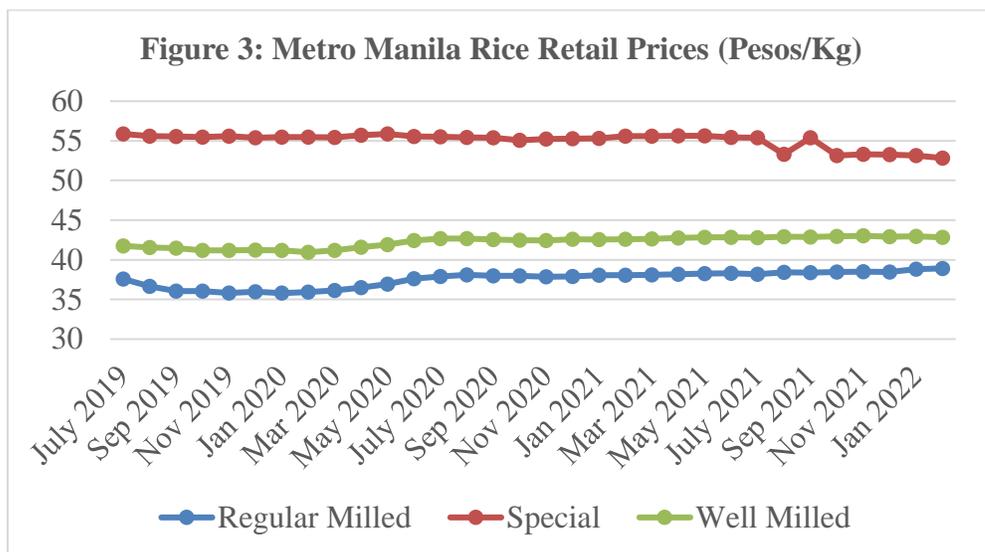
Source: Philippine Statistics Authority



Source: USDA-FAS PS&D

Consumption

FAS Manila forecasts rice consumption for MY 2022/23 at 15.3 million MT, up 350,000 MT from MY 2021/22. Rising consumption is based on growing population and rice being the staple crop. In addition, with higher prices of milling wheat, Filipinos are likely to shift some consumption from bread to rice, according to industry contacts.



Source: Philippine Statistics Authority

Trade

FAS Manila forecasts 2.8 million MT of rice imports for MY 2022/23, down 200,000 from MY 2021/22. The two leading presidential candidates in recent surveys expressed their sentiments against rice importation. As a primarily rice-consuming nation with limited capacity to expand growing areas, imports are expected to remain important in maintaining food security. The Philippine Tariff Commission is currently reviewing a petition to maintain the current Most Favored Nation (MFN) rate of 35 percent, with a public hearing held on March 17, 2022. The MFN rate was previously lowered to 35 percent for one year by [Executive Order 135](#), placing the rate in line with the ASEAN tariff.

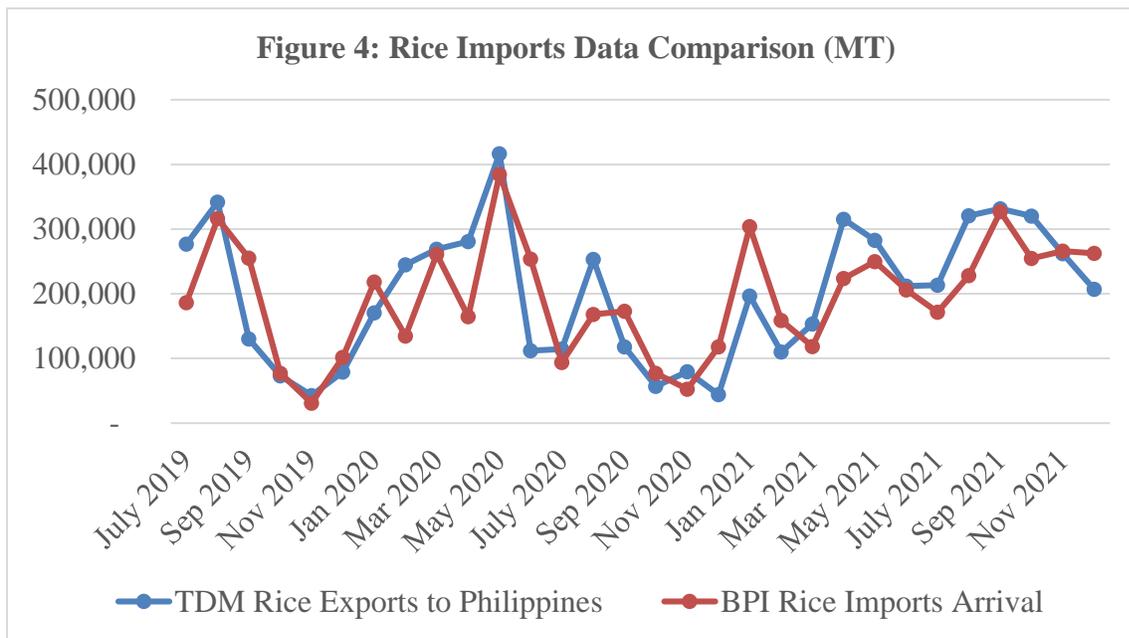
Industry contacts note that the Bureau of Plant Industry suspended the processing of Sanitary and Phytosanitary (SPSICs) for rice in January 2022 due to the March 2022 harvest season. According to industry, the utilization rate of rice SPSICs is 34.7 percent.

Table 5: Philippine Tariff Rates Rice HS Code 1006		
	From June 1, 2021 to June 1, 2022 (EO 135)	After June 1, 2022
In-Quota	35	40
Out-Quota	35	50
ASEAN	35	35

Source: [Philippine Tariff Commission](#)

Table 6: Rice Exports to the Philippines			
Metric Tons			
Country	MY 2020/21 July to Dec	MY 2021/22 July to Dec	% Share
Vietnam	556,362	1,378,002	83%
Myanmar	30,832	128,821	8%
Thailand	2,668	101,834	6%
India	1,403	11,743	1%
China	2	20,665	1%
Others	76,544	13,736	1%
Total	666,811	1,654,800	100%

Sources: Trade Data Monitor, LLC and Post research



Sources: Department of Agriculture- Bureau of Plant Industry and Trade Data Monitor, LLC

Table 7: Rice Sanitary and Phytosanitary Import Clearances Issued and Volume Applied Per Month (2021 vs. 2020)				
Month	2021 SPISC Issued	2021 Volume Applied (MT)	2020 SPISC Issued	2020 Volume Applied (MT)
January	79	99,710	801	666,482
February	187	262,337	1,076	805,775
March	419	542,646	679	552,090
April	731	725,304	680	654,234
May	353	307,835	513	436,631
June	784	707,742	177	146,038
July	779	663,237	299	216,798
August	759	535,594	365	259,180
September	917	642,152	14	14,463
October	476	389,459	-	-
November	400	303,330	-	-
December	1,937	1,824,205	931	1,043,907
Total	7,821	7,003,551	5,535	4,795,598

Source: Department of Agriculture-Bureau of Plant Industry

Wheat

Production, Supply, and Distribution

Table 8

Wheat Market Year Begins Philippines	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	2290	2290	1838	1838	0	1668
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	6113	6113	6500	6300	0	6300
TY Imports (1000 MT)	6113	6113	6500	6300	0	6300
TY Imp. from U.S. (1000 MT)	3127	3127	0	0	0	0
Total Supply (1000 MT)	8403	8403	8338	8138	0	7968
MY Exports (1000 MT)	65	65	70	70	0	65
TY Exports (1000 MT)	65	65	70	70	0	65
Feed and Residual (1000 MT)	2500	2500	2700	2500	0	2400
FSI Consumption (1000 MT)	4000	4000	3900	3900	0	3850
Total Consumption (1000 MT)	6500	6500	6600	6400	0	6250
Ending Stocks (1000 MT)	1838	1838	1668	1668	0	1653
Total Distribution (1000 MT)	8403	8403	8338	8138	0	7968
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA), (1000 MT), (MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Wheat begins in July for all countries. TY 2022/2023 = July 2022 - June 2023

Production

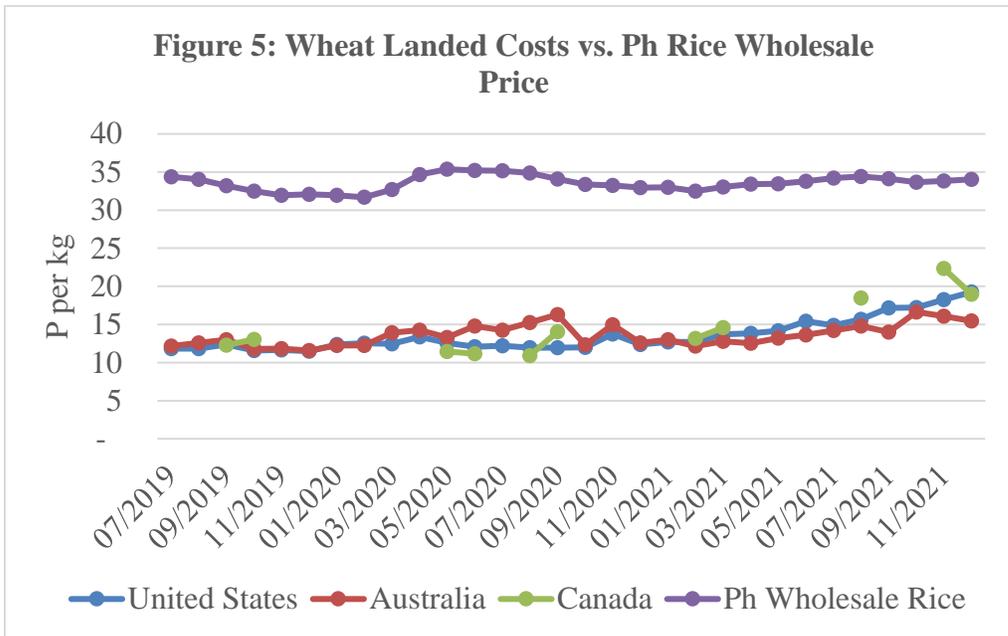
Commercial wheat and “small grain” (e.g., barley, oats, and rye) production is non-existent in the Philippines.

Consumption

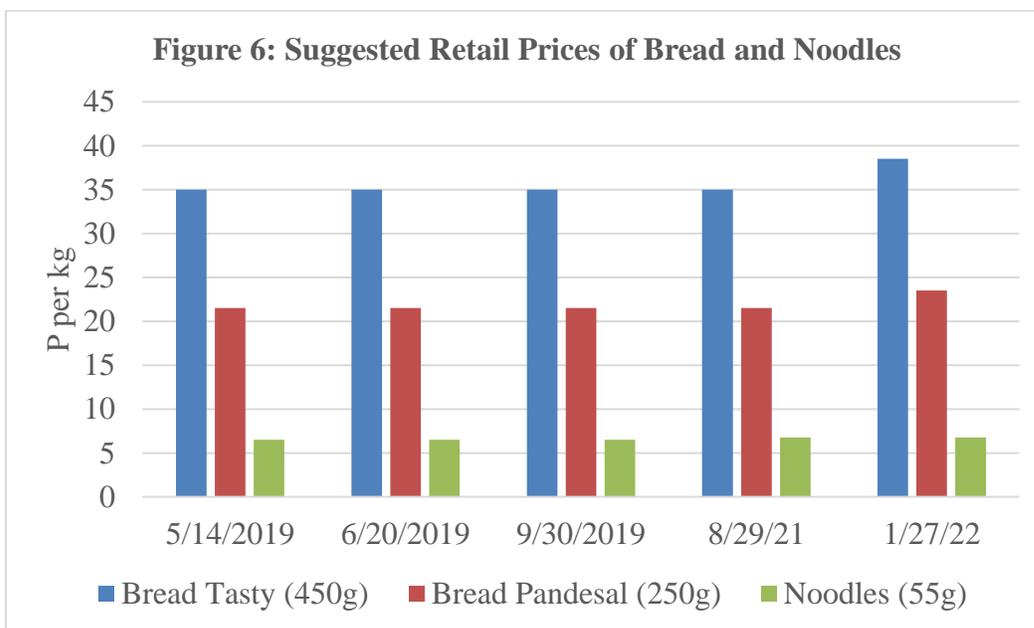
Post forecasts MY 2022/23 total wheat consumption at 6.25 million, down 350,000 MT from MY 2021/22 USDA Official due to high wheat prices. Feed demand for MY 2022/23 is seen at 2.4 million MT, down 300,000 MT from MY 2021/22 USDA Official. Factors include the ongoing Black Sea conflict and efforts by local feed millers to replace wheat with barley because of rising feed wheat prices. Uncertainty also remains in hog feed demand due to ongoing African Swine Fever spread. FAS Manila forecasts MY 2022/23 FSI Consumption at 3.85 million MT, down 50,000 MT from MY

2021/22, with the high price of milling wheat likely to shift some consumption from bread to rice. According to industry contacts, the share of milling wheat to the total cost of bread production is 71 percent. For noodles, the share is 30 percent.

Industry contacts note that there are currently 23 flour millers operating in the country, compared to 8 millers in the 1960s, with an annual capacity of 8 million MT. However, the current utilization rate is only 50 percent.



Source: Philippine Statistics Authority and Trade Data Monitor, LLC



Source: Department of Trade & Industry

Trade

FAS Manila forecasts MY 2022/23 wheat imports at 6.3 million MT, 200,000 MT lower than MY 2021/22, due to the uncertainty from the ongoing conflict in the Black Sea and the high global prices of wheat. Similarly, MY 2021/22 imports are lowered to 6.3 million MT because of the said Black Sea conflict.

Table 9: Wheat Exports to the Philippines				
HS 1001, Metric Tons				
Reporter	MY 2020/21	MY 2020/21 July to Dec	MY 2021/22 July to Dec	Tariff Rate
Total	5,999,662	3,437,799	3,399,243	
United States	3,126,693	1,681,804	1,361,755	Milling: 0%
Australia	1,436,971	322,457	849,005	Both: 0%
Ukraine	565,498	564,968	412,351	Feed: 7%
EU 27	257,698	257,698	328,278	Milling: 0%; feed: 7%
Russia	554,743	554,743	0	Feed: 7%
India	2,715	1,426	295,836	Feed: 0%
Others	55,344	54,703	152,018	Milling: 0%; feed: 7%

Source: Trade Data Monitor, LLC and Tariff Commission

Table 10: Wheat SPSICs Issued and Volume Applied per Month				
2021 vs. 2020				
Month	2021 SPSICs Issued	2021 Volume Applied	2020 SPSICs Issued	2020 Volume Applied
January	111	519,348	115	612,405
February	150	435,420	152	866,107
March	90	575,438	142	785,545
April	130	695,381	85	934,517
May	123	703,036	112	915,701
June	72	897,148	131	885,933
July	243	1,321,783	172	1,191,221
August	145	924,974	302	2,220,991
September	166	660,309	123	688,463
October	148	1,001,307	256	1,096,546
November	147	449,347	168	746,644
December	210	1,289,824	164	826,202
Total	1,735	9,473,316	1,922	11,770,274

Source: Department of Agriculture-Bureau of Plant Industry

Corn

Production, Supply, and Distribution

Table 11

Corn Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
Philippines	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2573	2573	2600	2600	0	2600
Beg. Stocks (1000 MT)	354	354	429	429	0	329
Production (1000 MT)	8352	8352	8100	8100	0	8300
MY Imports (1000 MT)	623	623	500	700	0	750
TY Imports (1000 MT)	352	352	500	700	0	750
TY Imp. U.S. (1000 MT)	7	7	0	0	0	0
Total Supply (1000 MT)	9329	9329	9029	9229	0	9479
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Res. (1000 MT)	6800	6800	6700	6800	0	6900
FSI Cons. (1000 MT)	2100	2100	2000	2000	0	2100
Total Cons. (1000 MT)	8900	8900	8700	8800	0	9000
Ending Stocks (1000 MT)	429	429	329	429	0	479
Total Distrib. (1000 MT)	9329	9329	9029	9229	0	9479
Yield (MT/HA)	3.246	3.246	3.1154	3.1154	0	3.1923

(1000 HA), (1000 MT), (MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Corn begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

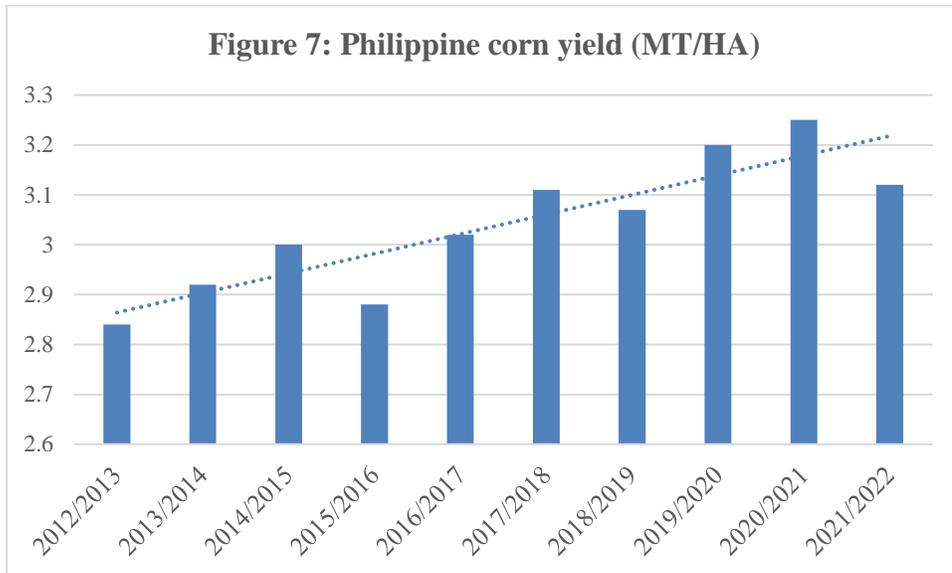
Production

FAS Manila forecasts MY 2022/23 corn production at 8.3 million MT, 200,000 MT higher than the previous year, based on favorable farm gate prices tempered with high fertilizer costs. Post leaves MY 2021/21 production unchanged at 8.1 million MT. Typhoon Odette, which hit the Philippines on December 16, 2021, only caused 24,000 MT of corn loss, compared to the larger impact on rice.

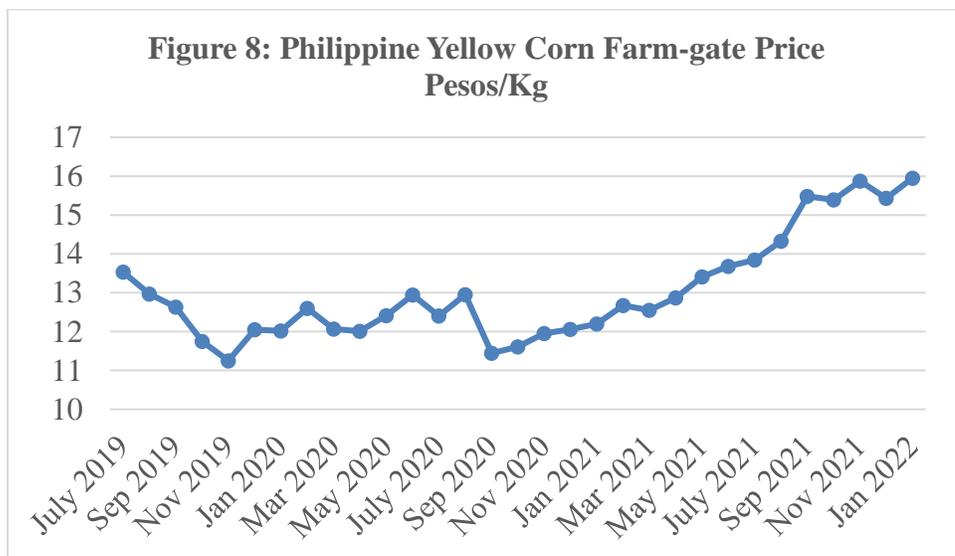
The Philippine Department of Agriculture (DA) has a modest yearly budget of under P2 billion (\$40 million) for the National Corn Program. Double cropping is prevalent with rice planting in the wet

season and corn planting in the dry season. Recently, DA granted corn farmers P3,000 (\$60) to apply to their fuel purchases.

Private companies do continuous research and development in seed technology and genetics to boost corn yields. The main input in corn production is fertilizer. Pesticides are available on standby but are not regularly used. Biotechnology adoption for yellow corn is widespread, with Bt corn providing a level of protection from Fall Armyworm. This does not apply to white corn, however, which is not genetically engineered and experiences losses from the pest.



Source: USDA-FAS PS&D



Source: Philippine Statistics Authority

Table 12: Philippine Yellow Corn Production by Region (Metric Tons)					
Region	MY 2019/20	MY 2020/21	MY 2020/21 July to Dec	MY 2021/22 July to Dec	%Δ
Philippines	5,983,435	6,160,095	3,062,234	2,959,922	-3%
Cagayan Valley	1,863,117	1,903,587	914,875	880,645	-4%
SOCCSKSARGEN	918,062	942,960	641,552	579,860	-10%
Northern Mindanao	840,961	845,679	579,853	672,169	16%
ARMM	611,976	669,966	360,107	227,045	-37%
Ilocos Region	515,527	522,941	9,076	10,388	14%
Central Luzon	244,930	273,866	13,014	25,587	97%
CAR	230,526	203,557	118,801	112,937	-5%
Western Visayas	223,241	239,399	138,352	162,225	17%
Bicol Region	209,334	219,236	100,210	101,145	1%
MIMAROPA	94,637	104,042	27,482	26,648	-3%
Caraga	82,524	78,550	67,070	73,176	9%
Davao Region	65,431	67,472	36,401	35,116	-4%
CALABARZON	45,020	52,820	32,762	23,505	-28%
Zamboanga Peninsula	29,626	26,865	16,995	20,614	21%
Eastern Visayas	6,723	6,317	3,458	3,367	-3%
Central Visayas	1,798	2,836	2,226	5,495	147%

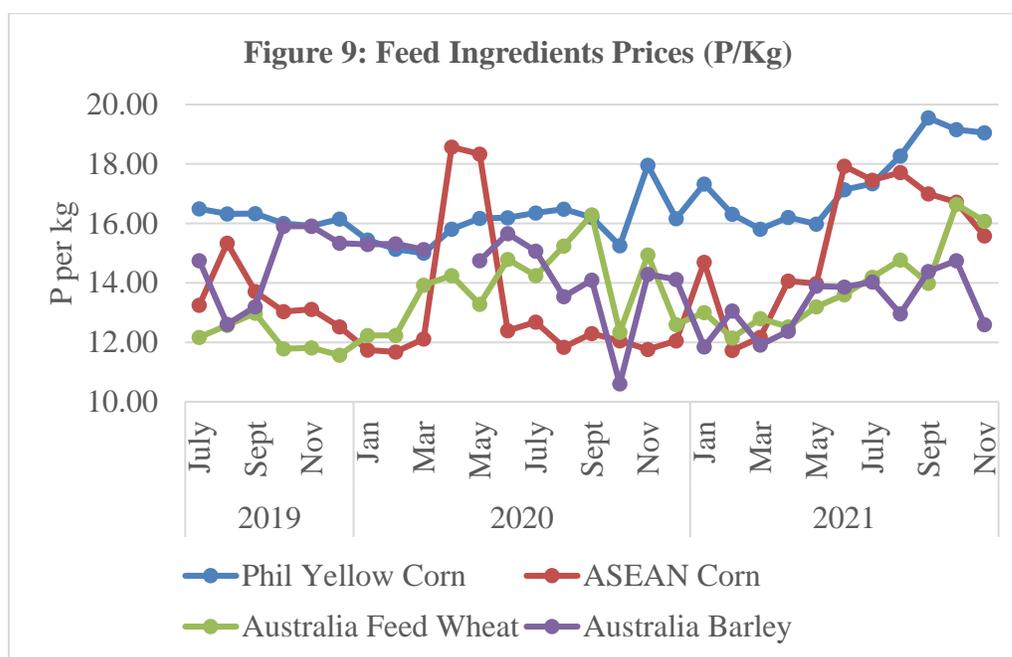
Source: Philippine Statistics Authority

Table 13: Philippine White Corn Production by Region (Metric Tons)					
Region	MY 2019/20	MY 2020/21	MY 2020/21 July to Dec	MY 2021/22 July to Dec	%Δ
Philippines	2,046,602	2,192,185	1,407,708	1,458,062	4%
Northern Mindanao	487,142	507,955	370,106	379,187	2%
ARMM	463,034	539,095	311,437	372,748	20%
SOCCSKSARGEN	208,325	214,352	138,040	147,658	7%
Davao Region	187,206	205,513	123,597	118,791	-4%
Zamboanga Peninsula	152,142	148,493	102,253	118,848	16%
Central Visayas	100,254	125,938	104,161	79,432	-24%
Ilocos Region	45,886	47,702	9,594	8,898	-7%
CAR	16,210	18,257	15,685	15,802	1%
Western Visayas	86,084	92,547	60,961	56,575	-7%
Bicol Region	66,615	71,131	38,269	39,715	4%
Eastern Visayas	66,508	62,047	38,370	33,287	-13%
Central Luzon	40,328	40,335	13,013	9,242	-29%
Cagayan Valley	28,010	26,103	12,266	7,977	-35%
CALABARZON	26,277	23,407	16,498	16,674	1%
MIMAROPA	14,975	14,434	9,293	6,949	-25%
Caraga	57,606	54,876	44,164	46,280	5%

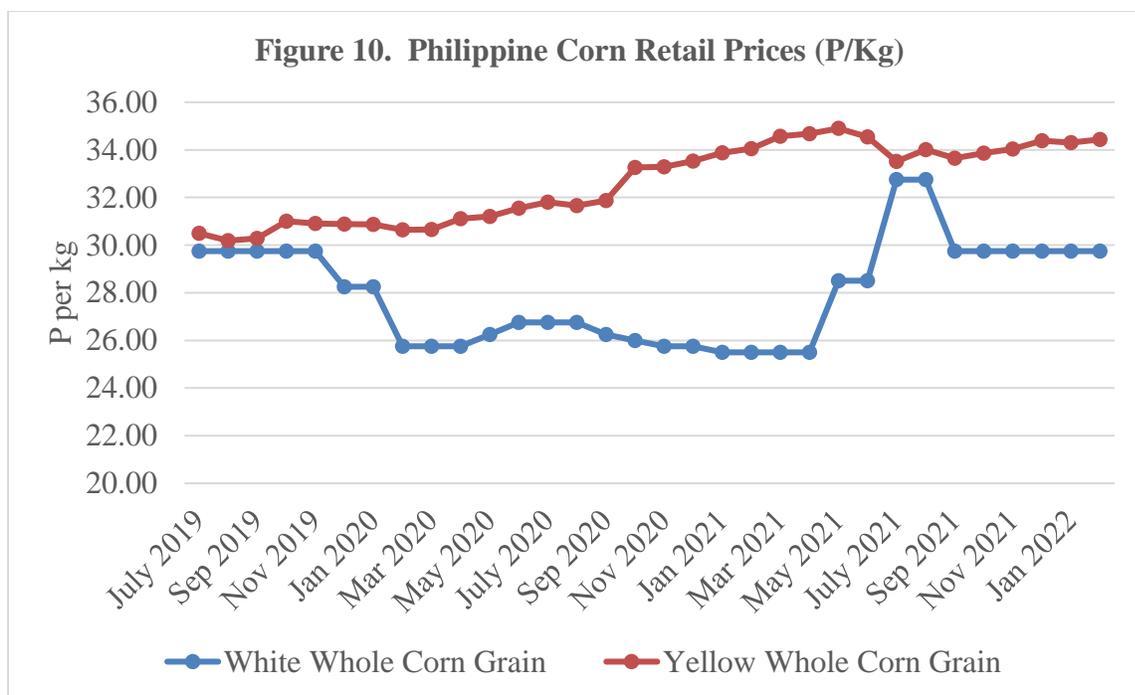
Source: Philippine Statistics Authority

Consumption

FAS Manila forecasts MY 2022/23 total corn consumption at 9.0 million MT, up 300,000 MT compared to the previous year due to higher feed wheat prices. Corn FSI consumption during the same period is expected to reach 2.1 million MT. Meanwhile, Post forecasts MY 2022/23 feed consumption at 6.9 million MT, up 200,000 MT, because of the growth in poultry feed demand and lower feed wheat consumption. Post raises MY 2021/22 feed consumption by 200,000 MT due to the disruptions from the conflict in Ukraine reducing feed wheat availability. The Bureau of Animal Industry reported several Highly Pathogenic Avian Influenza outbreaks in January and February 2022, which Post does not expect to affect broiler or layer production. For more information, see the latest Livestock and Poultry Update.



Source: Philippine Statistics Authority for Ph Yellow Corn;
Trade Data Monitor, LLC for other feed ingredients



Source: Philippine Statistics Authority

Trade

Post forecasts MY 2022/23 corn imports at 750,000 MT, up 250,000 MT from the previous year, due to the disruptions and market uncertainty of feed wheat caused by the Ukraine conflict. Although hog feed demand remains constrained by African Swine Fever, poultry demand is expected to grow 1 to 2 percent during the same period. Moreover, there is an ongoing effort at the Tariff Commission to reduce the MFN corn tariff rate to 5 percent and raise the Minimum Access Volume to 4 million MT to lower the cost of production for pork and poultry. Proponents of the petition note that feed constitutes about 70 percent of the total cost of production, and corn represents half of feed costs. The Tariff Commission held a public hearing on March 18, 2022, with results expected in the coming weeks.

Table 14: Philippines Corn Imports (MT)				
HS 1005				
Reporter	MY 2020/21	MY 2020/21 July to Dec	MY 2021/22 July to Dec	Tariff Rate
Total	622,634	554,721	391,665	
Vietnam	388,883	357,447	116,216	5%
Myanmar	43,158	27,083	217,137	5%
Thailand	12,611	67	45,871	5%
U.S.	84,609	81,176	4,737	35/50%
Argentina	6,599	3,672	5,218	35/50%
Others	114,727	85,275	2,485	35/50%

Source: Philippines Statistics Authority

Table 15: SPSICs Issued and Volume Applied for Corn Per Month 2021 vs. 2020				
Month	2021 SPSICs Issued	2021 Volume Applied	2020 SPSICs Issued	2020 Volume Applied
January	36	26,966	223	379,166
February	34	48,544	99	135,531
March	17	7,042	88	95,920
April	12	14,249	82	127,793
May	28	48,625	72	128,698
June	29	54,262	55	80,144
July	20	29,266	45	72,370
August	49	69,568	53	60,830
September	132	199,997	49	63,216
October	110	202,716	37	8,781
November	152	279,572	17	1,497
December	133	180,756	11	1,676
Total	752	1,161,560	831	1,155,621

Source: Department of Agriculture-Bureau of Plant Industry

Cassava

FAS Manila forecasts MY 2022/23 overall cassava production at 2.57 million MT, down 32,000 MT from MY 2021/22. Industry contacts notes that cassava production and area have historically been declining due to low prices for cassava feed. Meanwhile, cassava for food production is forecast to grow to 1.23 million MT because of the growing population. Post forecasts MY 2022/23 cassava feed production declining to 1.33 million MT due to the low profitability of cassava feed.

DA support to cassava growers includes provision of planting materials, machinery and equipment, tractors, and trainings. Two prominent feed millers use cassava, although it is believed that some other feed millers use it in small quantities. Cassava can partially replace corn and wheat as an energy source. Cassava is often used to feed pigs and in smaller quantities for broiler, layer, and aquaculture feeds.

Table 16: Philippines Cassava Production, Area, and Yield			
	MY 2020/21	MY 2021/22	MY 2022/23
Cassava Production (1000 MT)	2,634	2,600	2,568
Area Harvested (1000 Hectares)	217	213	209
Cassava for Food (1000 MT)	1,184	1,208	1,232
Cassava for Feed (1000 MT)	1,450	1,392	1,336
Yield (MT/Hectares)	12.1	12.2	12.3

Note: MY 2020/21, MY 2021/22, and MY 2022/23 are estimates based on historical PSA data.

Sorghum

Production, Supply, and Distribution

Table 17

Sorghum Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
Philippines	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvest. (1000 HA)	0	0	0	0	0	0
Begin. Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	34	30	25	25	0	30
TY Imports (1000 MT)	28	30	25	25	0	30
TY Imp. U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	34	30	25	25	0	30
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Res. (1000 MT)	34	30	25	25	0	30
FSI Cons. (1000 MT)	0	0	0	0	0	0
Total Con. (1000 MT)	34	30	25	25	0	30
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distrib. (1000 MT)	34	30	25	25	0	30
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA), (1000 MT), (MT/HA)

MY = Marketing Year, begins with the month listed at the top of each column

TY = Trade Year, which for Sorghum begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

FAS Manila forecasts MY 2022/23 sorghum imports at 30,000 MT, based on stable demand from feed millers. According to the Philippine Department of Agriculture's Corn Program, sorghum production is still in the experimental stage. Local production is therefore negligible. Industry contacts note that sorghum is not a common choice in broiler and swine feed. Sorghum is instead used as a feed ingredient for game fowl and aquaculture.

Table 18: Sorghum Exports to the Philippines (MT)				
Country	MY 2020/21	MY 2020/21 July to Dec	MY 2021/22 July to Dec	Tariff Rate
Total	29,761	17,588	13,475	
Australia	26,038	15,165	12,799	0%
Thailand	1,182	414	292	5%
India	869	533	384	0%
Others	1,672	1,476	-	

Source: Trade Data Monitor, LLC

Barley

FAS Manila forecasts MY 2022/23 barley imports at 700,000 MT, buoyed by feed milling companies' need to explore alternative energy sources as a result of high wheat prices. Post estimates MY 2021/22 barley imports at 720,000 MT based on year-to-date data. Australian barley imports started to increase from August 2020, as feed wheat prices began to rise. With the ongoing conflict in the Black Sea, a major supplier of feed wheat to the Philippines, Post expects barley imports to remain elevated.

Table 19: Barley Exports to Philippines HS 1003 Metric Tons				
Reporter	MY 2020/21	MY 2020/21 Jul - Dec	MY 2021/22 Jul - Dec	Tariff Rate
Total	115,775	11,481	326,341	
Australia	115,757	11,475	326,311	0%
Others	18	7	30	7%

Source: Trade Data Monitor, LLC

Attachments:

No Attachments