

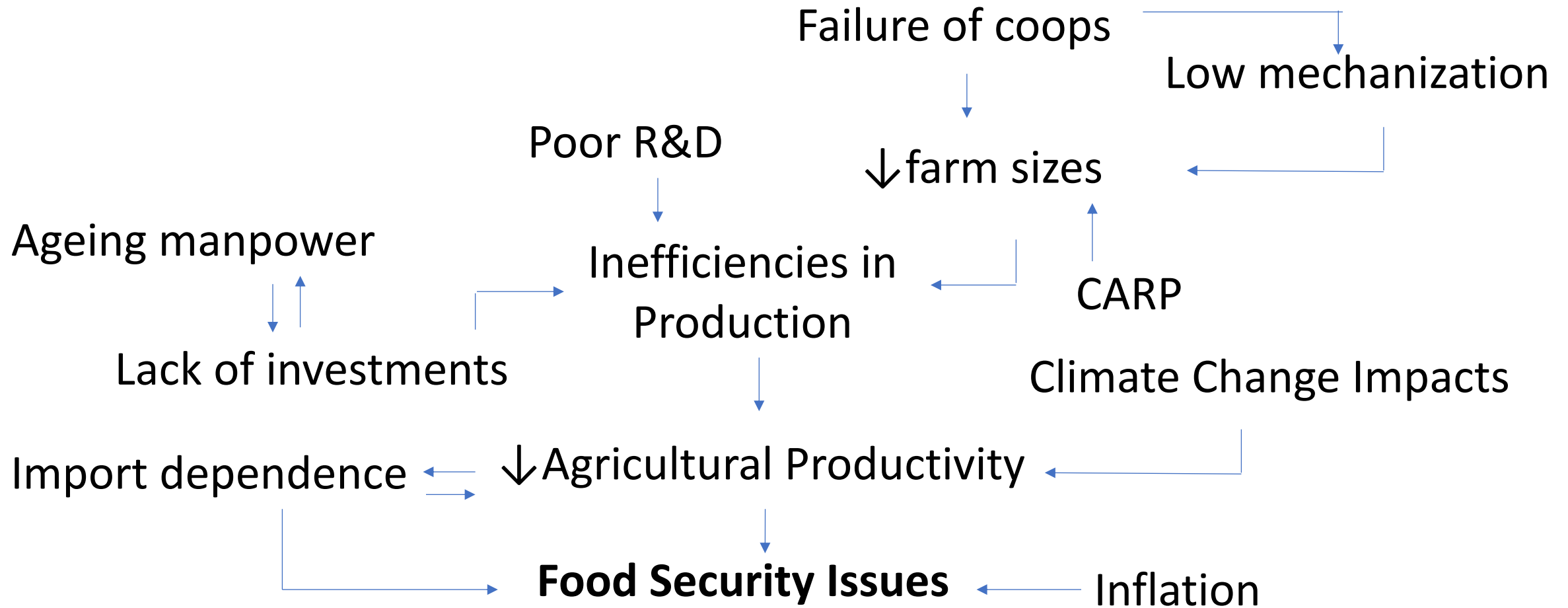
Strategies in Improving the Agriculture Sector

Carlos Primo C. David, Ph.D.

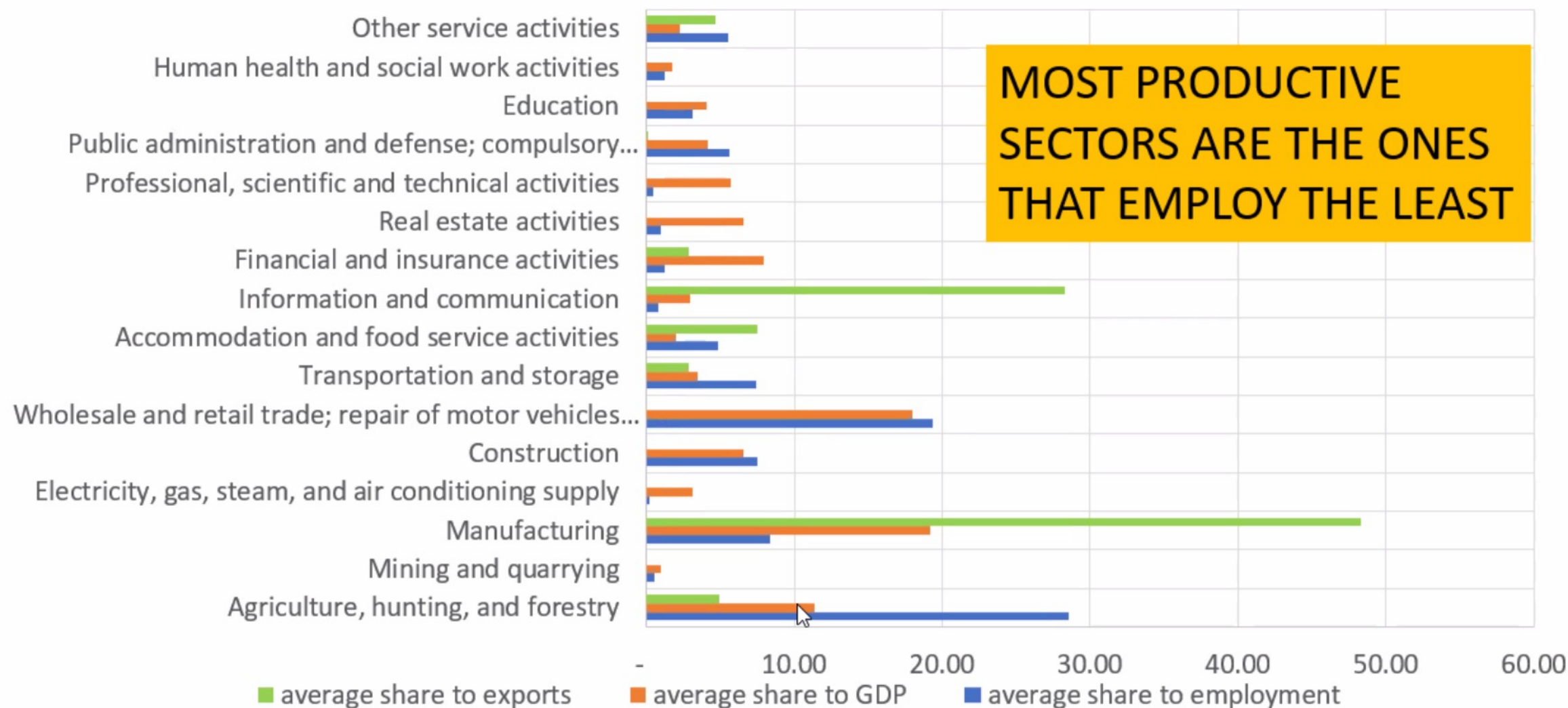


Agricultural (un)Productivity: A Historical Context

- The National Industrialization Program in the 1960s
- ***“An industrial nation is a prosperous and, hence, a strong and dominant nation; while an agricultural nation is a poor and, consequently, a weak and dependent nation” – Claro M. Recto***
- Led to the migration of rural farmers to urban centers
- Decrease in investments in Agriculture
- Farm schools were converted into regular Colleges
- Import Substitution – coconut, mangoes, pineapple, bananas

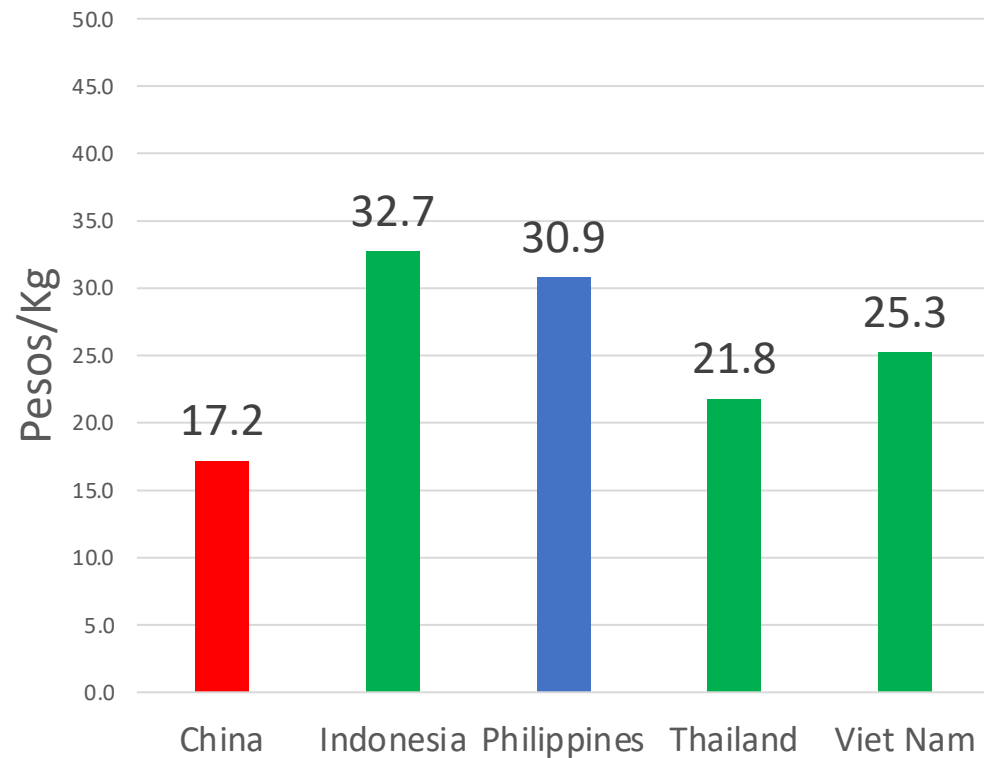


Comparative Shares in Exports, GDP and Employment 2010 - 2020

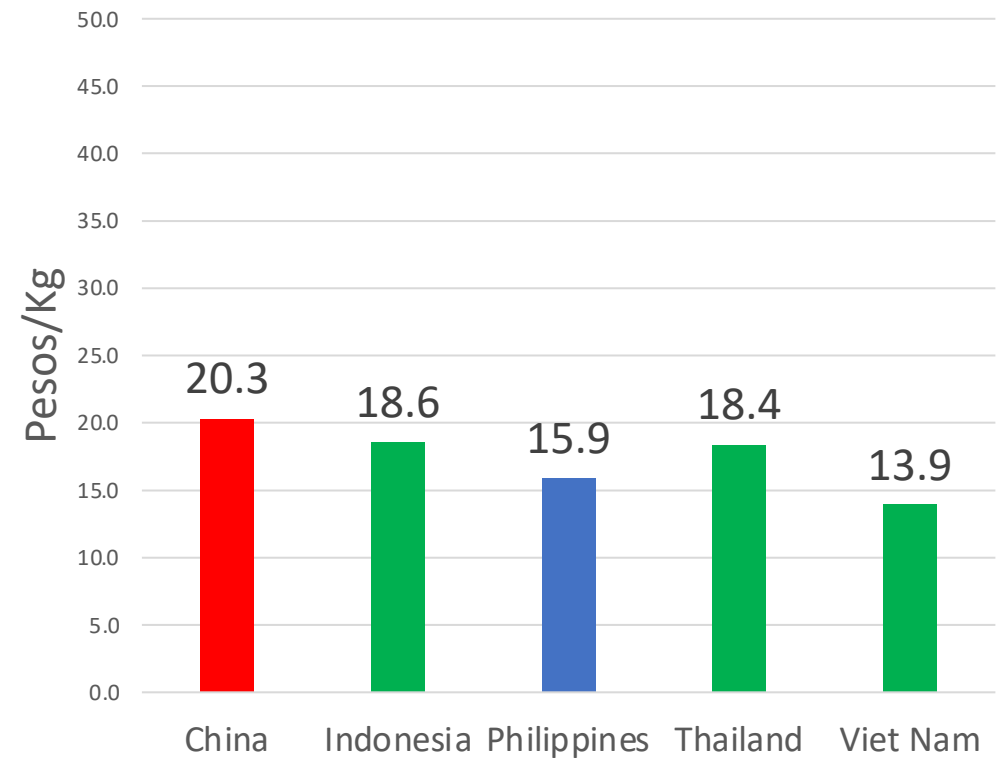


Farmgate Prices (FAO, 2021)

Potatoes

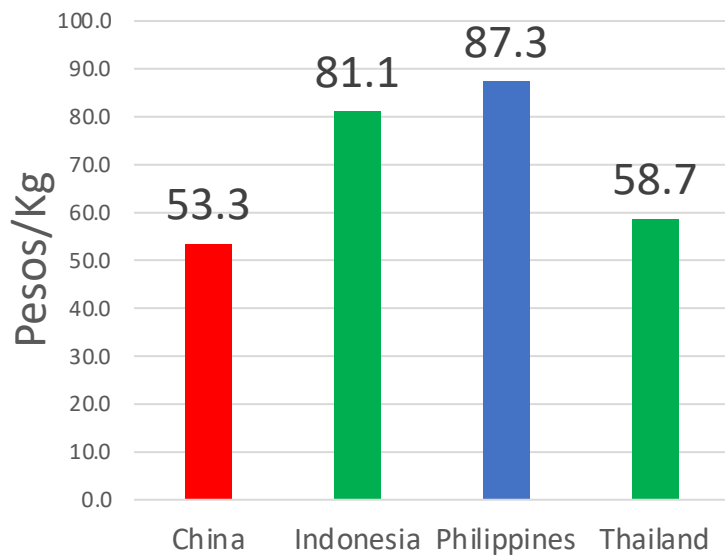


Rice

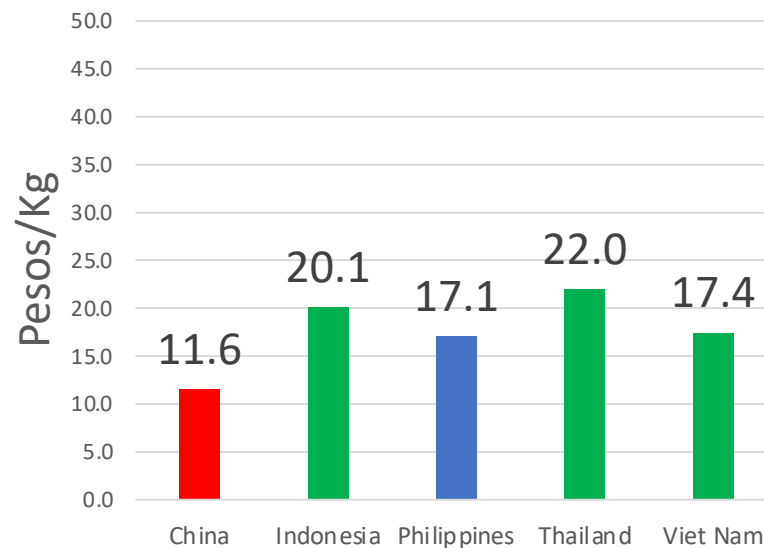


Farmgate Prices (FAO, 2021)

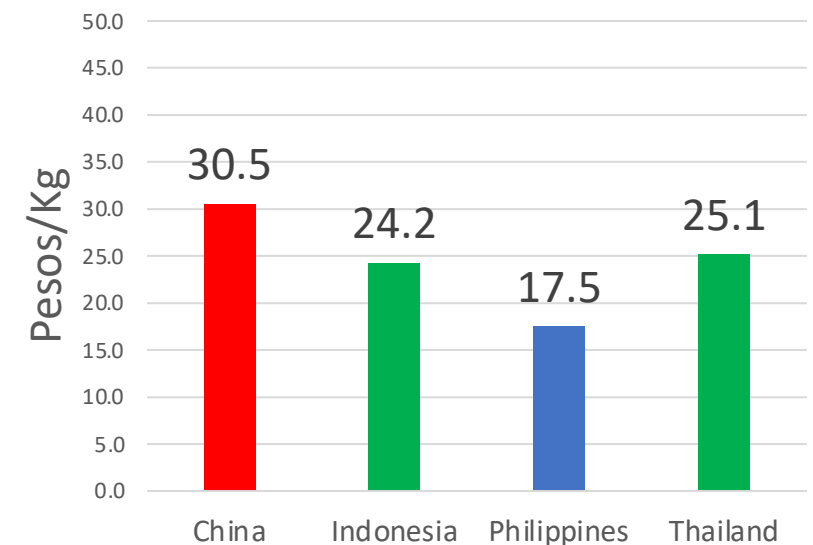
Garlic



Cabbage



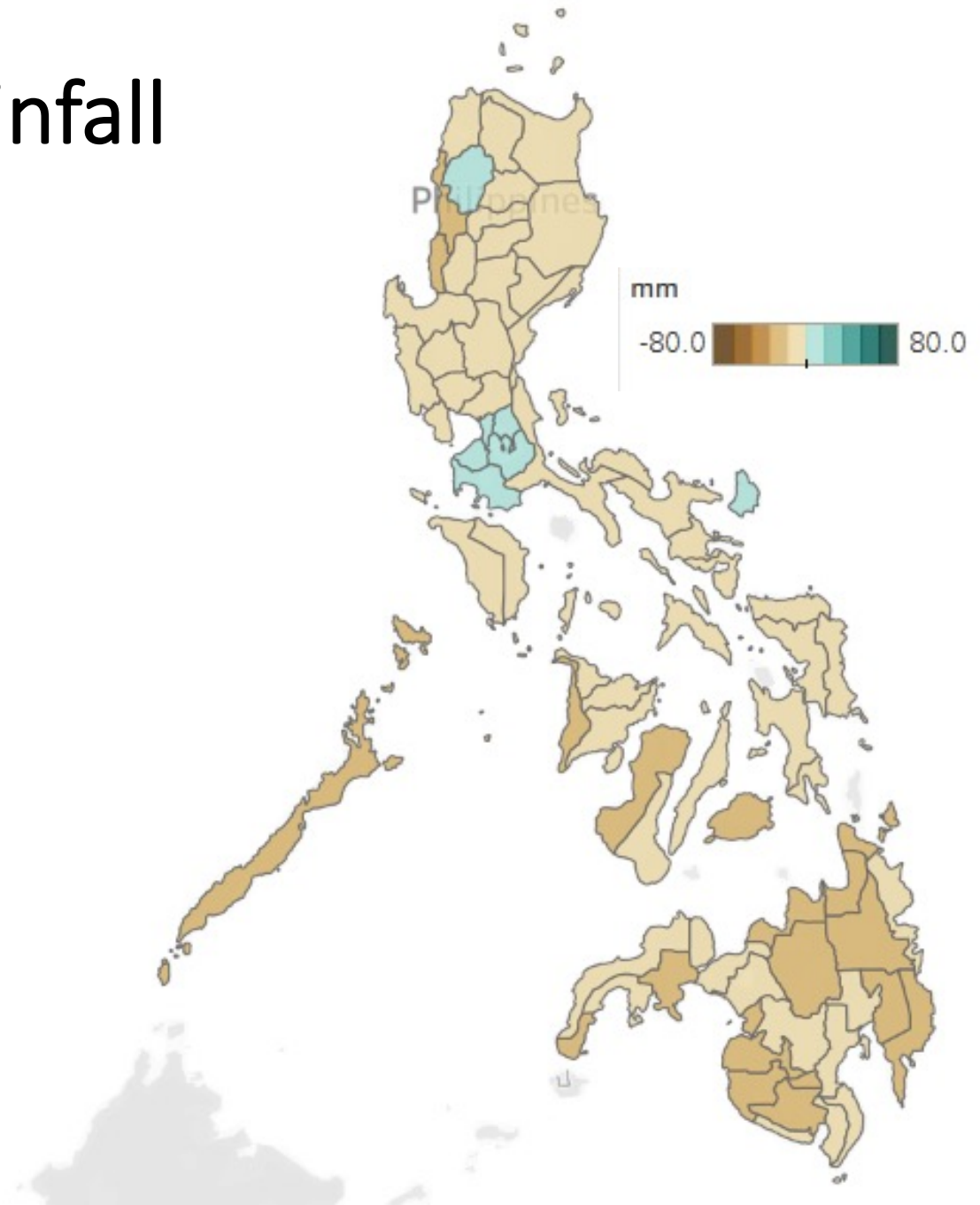
Tomatoes



COMMODITY	FARMGATE PRICE (P)	RETAIL PRICE (kg)	RETAIL PRICE (BANGKOK)
Tomatoes	17.50	80	70
Cabbage	17.10	210	185
Onions	39.70	120	100
Milled Rice	15.90	42	46.50

Climate Change Impacts: Rainfall

- Projected for 2050s
- Low vs High Emission Scenario
- Drier Dry Season, Wetter Wet Season



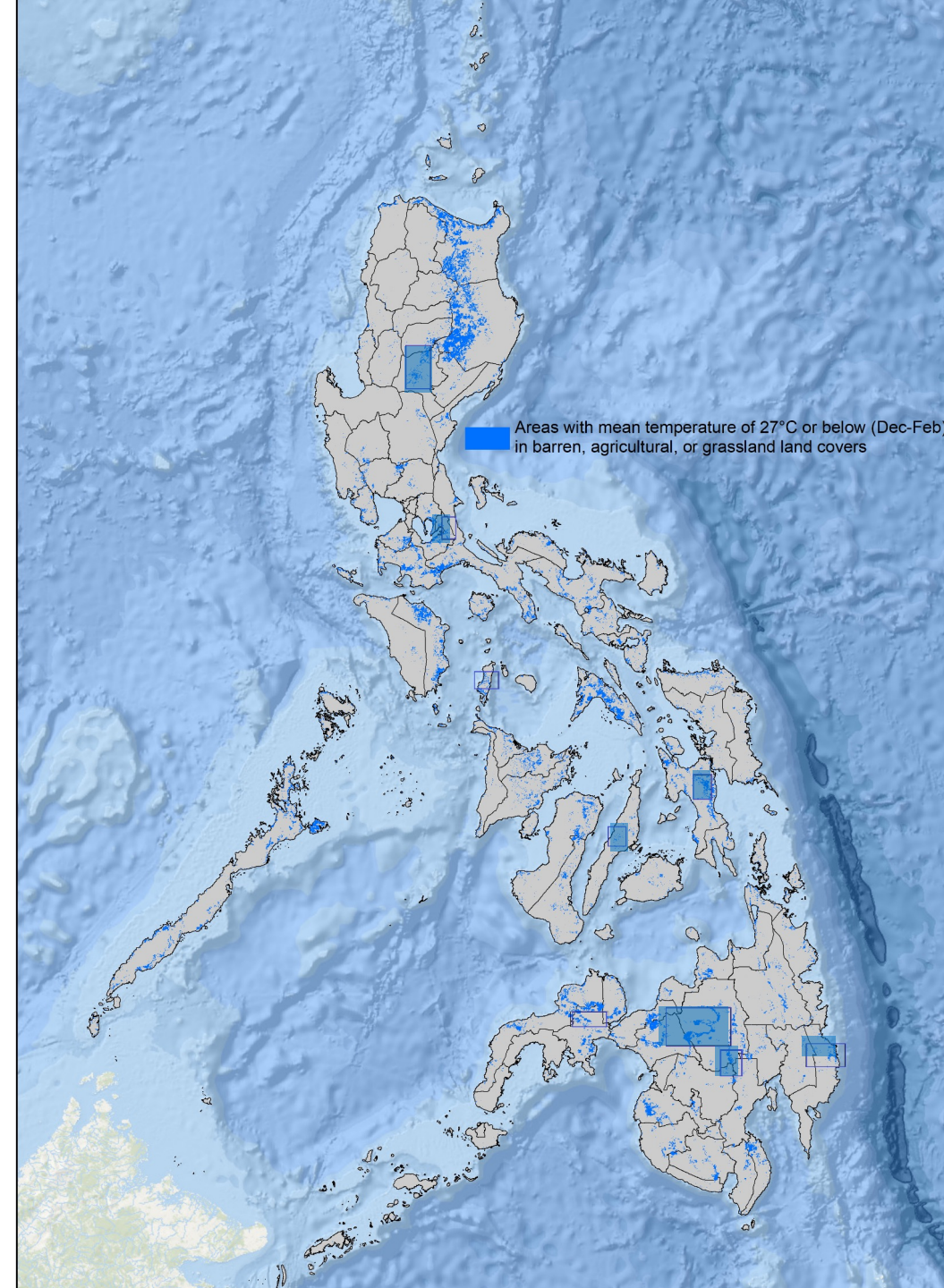
Imports (in million USD)

1. USD862 million worth of rice in 2020;
2. Processed foods dominate our importation requirements;
3. Importation of cool weather fruits and vegetable is increasing at a rate of 15 to 28% a year.

Commodity	2016	2017	2018	2019	2020
Beef	334.99	404.77	439.28	415.10	361.55
Pork	130.52	171.91	195.27	169.19	128.24
Chicken	0.27	0.11	2.02	2.23	0.96
Processed Meat	276.79	529.79	479.05	551.88	486.94
Potato	8.87	9.12	10.80	11.40	12.72
Onion/Garlic	37.51	24.19	42.48	28.23	40.59
Peas	15.85	20.76	22.02	24.86	29.81
Mushrooms	0.30	0.59	1.55	2.64	2.82
Preserved Vegetables	232.72	301.69	286.90	347.89	290.83
Dried Vegetables	19.22	23.12	21.74	24.18	18.97
Apples	176.02	178.32	187.03	211.37	300.55
Citrus	63.42	72.80	95.41	127.40	170.26
Grapes	56.89	60.04	71.04	118.90	138.81
Wheat	1,040.76	1,303.52	1,682.64	1,847.09	1,573.21
Baking flour	386.09	413.04	432.91	504.29	583.96
Milled starches	235.28	240.59	281.10	300.29	226.41
Rice	210.67	357.72	736.65	1,144.67	862.01
Corn	201.93	129.09	268.11	158.68	212.52
Sorghum	5.66	4.33	6.53	8.08	17.15
Seeds/Soy	17.02	22.49	24.50	50.99	38.73
Salt	24.45	26.97	23.37	36.00	28.83
Coffee	83.52	58.54	91.45	74.06	81.13
Tea Leaves	6.08	7.07	7.67	11.69	8.14
Other food preparations	1,291.41	1,420.85	1,464.58	1,717.47	1,587.63
Milk	491.41	495.25	507.60	624.03	635.01
Beverages/Spirits	472.63	563.10	612.82	661.30	515.99
TOTAL	5,820.27	6,839.79	7,994.53	9,173.91	8,353.75

Cool Weather Areas

- Cool weather from Dec-Feb
- Perennial cool weather areas
- Highly valuable agricultural lands



The Concept of Food Production Areas (FPAs)



Industrial Farms



Processing Plants



Smallholder Farms



Farm Schools

End

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