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**Report Highlights:**

FAS Manila forecasts pork production in 2026 at 980 thousand metric tons (TMT) carcass weight equivalent (CWE), a rebound from the estimated production in 2025. While the resurgence in African Swine Fever during the second half of 2024 continues to dampen production, expanded coverage of the government-controlled vaccine roll out, strengthened biosecurity measures, and adoption of improved technologies will facilitate production growth in 2026. The beef and carabeef production in 2026 is forecast virtually unchanged from 2025 at 182 TMT CWE as herd numbers have not increased despite increased imports of cattle genetics and live animals. Additionally, pork and beef imports in 2026 are forecast to increase, driven by higher demand, robust economic growth, and the sustained increase in population.

## Executive Summary

### **PORK**

**Production:** Pork production is forecast to expand 2 percent in 2026, supported by expanded coverage of the government-controlled African Swine Fever (ASF) vaccine roll out, heightened biosecurity measures implemented by swine industry, and adoption of available modern technologies. The lower cost of feed is expected to provide cost relief and enhance profitability.

**Consumption:** Pork consumption is forecast to increase 4 percent in 2026, driven by a sustained increase in population and robust economic growth. The Philippine government also continues to implement measures to keep inflation within a target range, which will help consumers access affordable meat products.

**Trade:** Pork imports are forecast 7 percent higher in 2026 amid local production challenges, driven by an animal disease outbreak, combined with increased demand due to the growing population. Brazil is expected to remain as the Philippine's top market source of imported pork products, following the accreditation granted to its pork exporters and benefitting from its competitive pricing.

### **BEEF**

**Production:** Beef and carabeef production in the country is forecast virtually unchanged in 2026 from the 2025 estimate, as total slaughter and inventory may continue to marginally improve. Efforts to improve cattle and carabao genetics have yet to show meaningful changes in total beef production.

**Consumption:** Beef consumption is forecast to increase 2 percent in 2026, supported by population and economic growth. The introduction of more beef products and the visibility of more restaurants offering beef are indicative of continued demand.

**Trade:** Beef imports are forecast up by 3 percent in 2026 due to the shortfall in domestic beef production amid increasing demand of household, food processors, and the food service sector. The increase is also supported by wider market sources for beef products, with Brazil, Australia, and India shown to remain strong players in the domestic market.

## I. PORK

**Table 1. Pork Production, Supply, and Distribution (PS&D) in the Philippines**

Meat, Swine Market Year Begins  Philippines	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Slaughter (Reference)</b> (1000 HEAD)	0	0	0	0	0	0
<b>Beginning Stocks</b> (1000 MT CWE)	74	74	92	92	0	85
<b>Production</b> (1000 MT CWE)	1000	1000	1020	960	0	980
<b>Total Imports</b> (1000 MT CWE)	596	596	630	700	0	750
<b>Total Supply</b> (1000 MT CWE)	1670	1670	1742	1752	0	1815
<b>Total Exports</b> (1000 MT CWE)	2	2	2	1	0	1
<b>Human Dom. Consumption</b> (1000 MT CWE)	1576	1576	1655	1666	0	1734
<b>Other Use, Losses</b> (1000 MT CWE)	0	0	0	0	0	0
<b>Total Dom. Consumption</b> (1000 MT CWE)	1576	1576	1655	1666	0	1734
<b>Ending Stocks</b> (1000 MT CWE)	92	92	85	85	0	80
<b>Total Distribution</b> (1000 MT CWE)	1670	1670	1742	1752	0	1815
(1000 HEAD) ,(1000 MT CWE)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

*Note: Not USDA official data.*

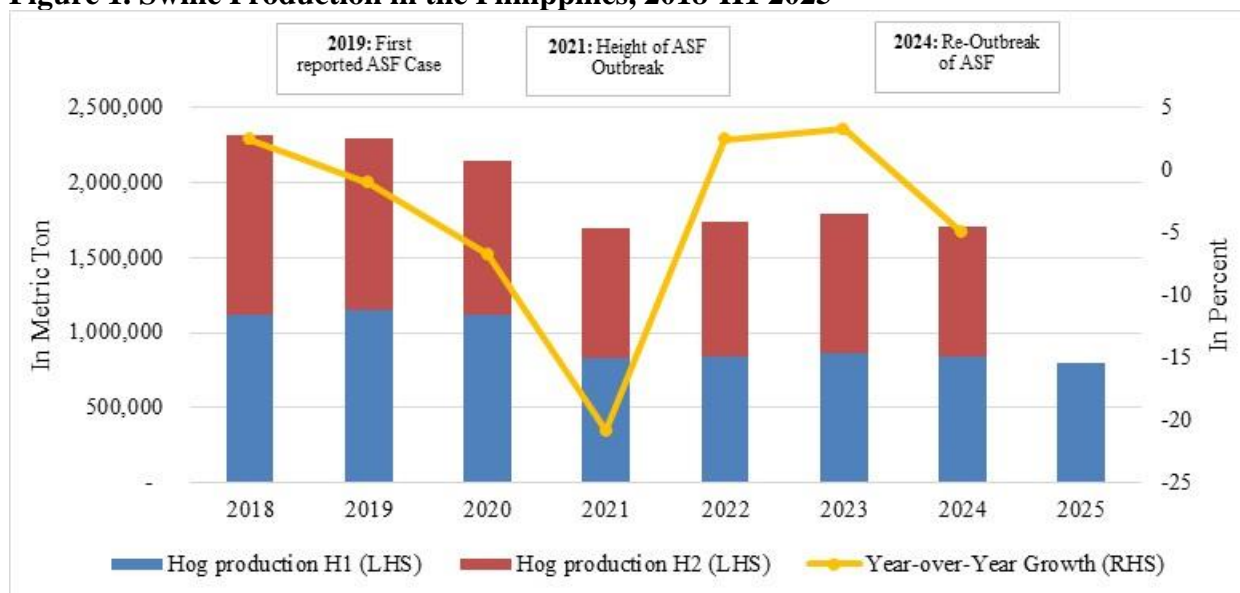
### Production

FAS Manila forecasts pork production at 980 TMT CWE in 2026, up 2 percent from the 2025 estimate. Contributing to the forecast production growth are expanded coverage of the government-controlled ASF vaccine rollout, heightened biosecurity measures implemented by swine industry, and adoption of better swine genetics among commercial farms. Lower feed costs, particularly local corn and imported soybean meal, are expected to provide cost relief and enhance profitability.

FAS Manila revises its 2025 pork production estimate to 960 TMT CWE due to the impact of ASF resurgence in the second half (H2) of 2024. According to the Philippine Statistics Authority (PSA), the local swine production contracted by 5 percent year-over-year in 2024 and by 5.6 percent in H1 2025 (**Figure 1**). Additionally, the inventory of live swine as of July 1, 2025, was 9.01 million heads, the lowest since 2019 (**Figure 2**). Smallhold farms, which account for 72 percent of the total swine inventory, declined by 5.7 percent year-over-year in July 2025. While Post does not adopt PSA's exact

swine production data, PSA’s production trend aligns with FAS Manila’s analysis (see [Philippines: Livestock and Products Annual](#) in 2024).

**Figure 1. Swine Production in the Philippines, 2018-H1 2025**

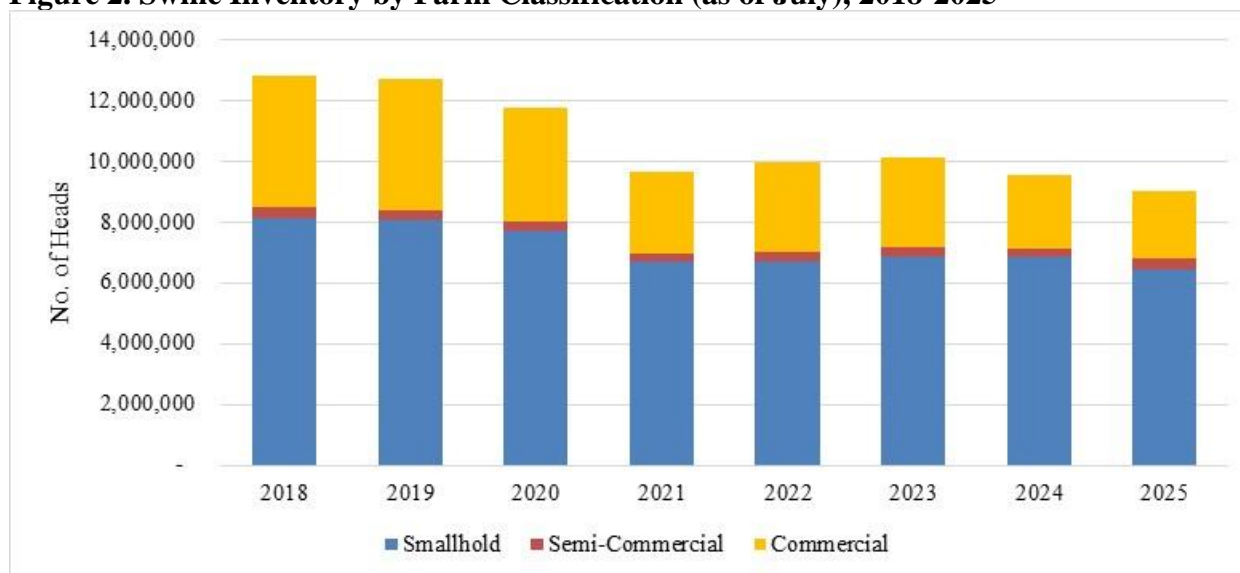


Source: [PSA](#)

Notes:

1. LHS refers to left hand side vertical axis.
2. RHS refers to right hand side vertical axis.

**Figure 2. Swine Inventory by Farm Classification (as of July), 2018-2025**



Source: [PSA](#)

Notes:

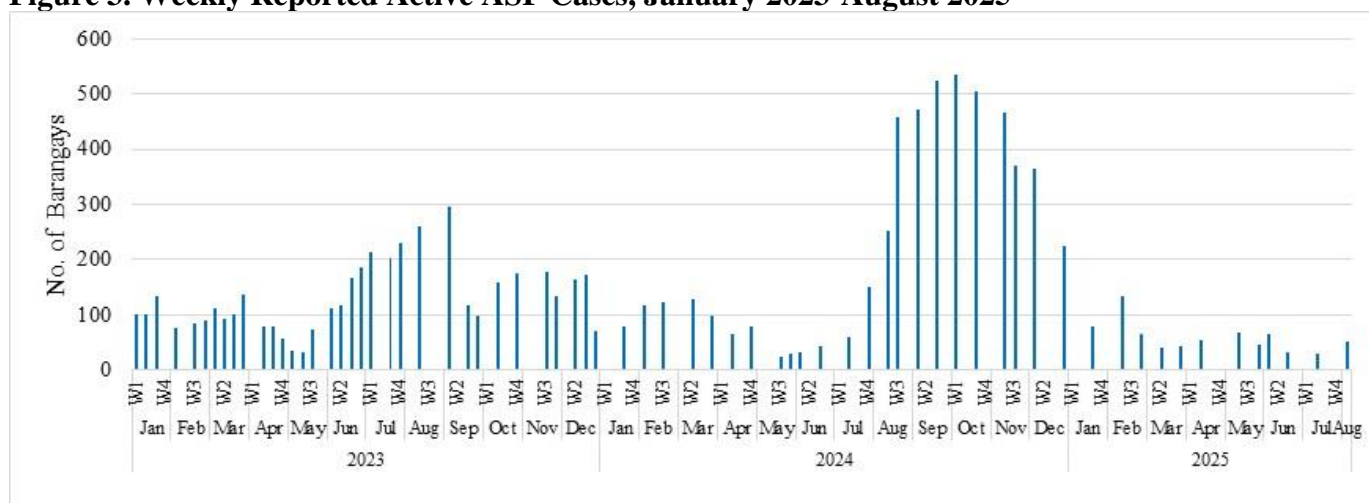
1. Smallhold farms are tending 1 to 10 sow level or 1 to 100 heads.
2. Semi-commercial farms are tending 11 to 50 sow level or 101 to 500 heads.
3. Commercial farms are tending 51 sow level and above or 501 heads and above.

### *Reported ASF cases declined as of August 2025*

Swine output declined during H1 2025, following a spike in active ASF cases in H2 2024 (**Figure 3**). During this period, ASF outbreaks were reported in top hog-producing areas such as the CALABARZON Region (**Figure 4**). As of August 7, 2025, the Bureau of Animal Industry's (BAI) data indicated active ASF cases in 51 barangays,<sup>1</sup> an 80 percent decline compared to the same period in 2024. There have been no reported cases in the province of Batangas, a major hog producer in CALABARZON, as of August this year.

Industry contacts report that some farms have initiated disinfection and repopulation efforts, as shown by the recent rise in demand for gilts. The increase in gilt purchases could support the forecasted modest recovery in pork production by 2026.

**Figure 3. Weekly Reported Active ASF Cases, January 2023-August 2025**



Source: [BAI](#)

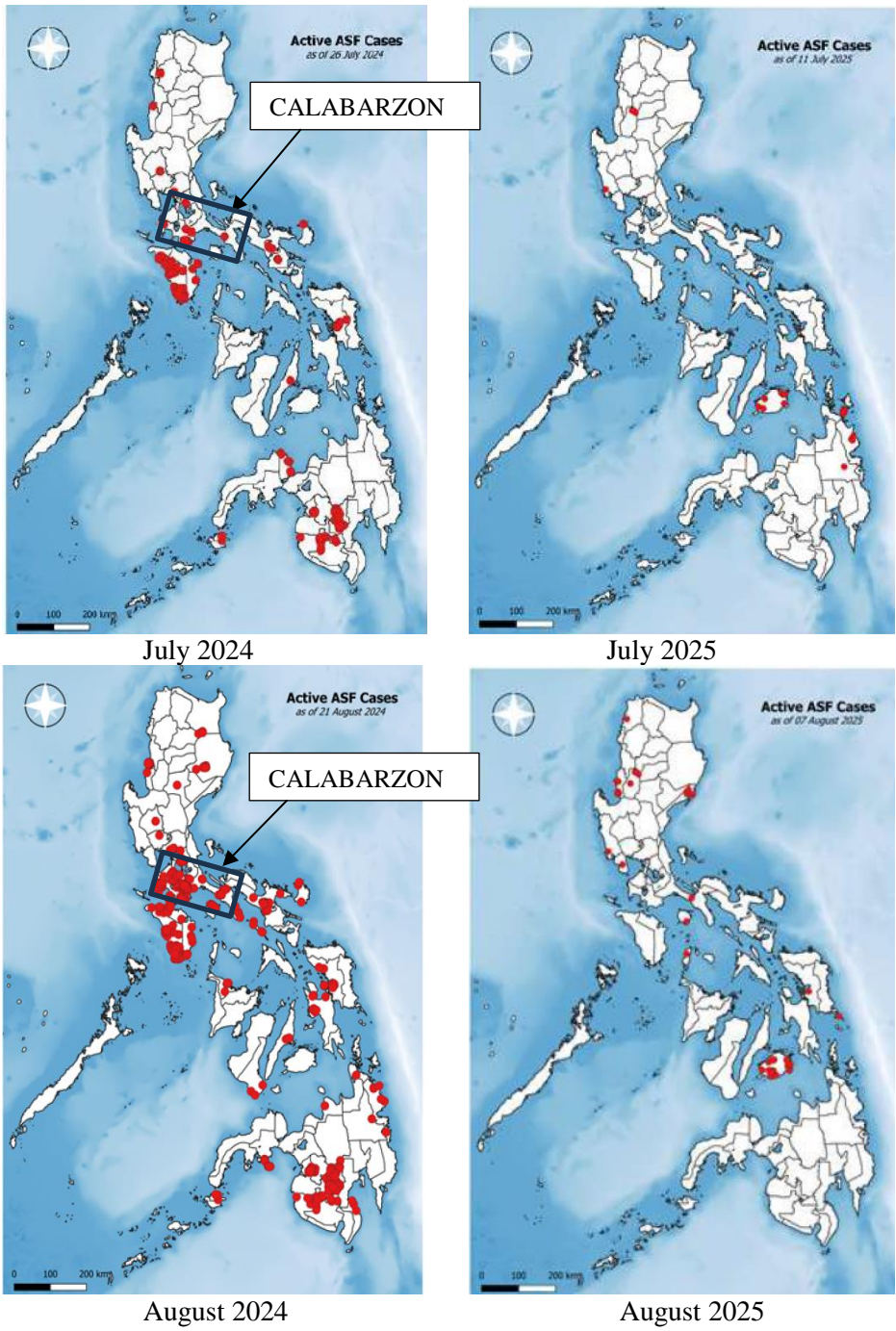
### *Government reinforces commitment to curb ASF spread and boost local hog production*

During his fourth [State of the Nation Address](#) on July 28, 2025, President Ferdinand Marcos Jr. emphasized measures to tackle food security challenges. The Philippine government, through the Department of Agriculture (DA), will distribute piglets and sows; and construct bio-secured facilities to boost production. These interventions are part of the DA's [Swine Industry Recovery Project](#), a PhP1.25 billion-funded (USD21.8 million) initiative announced in January 2025 that will involve smallhold farms, cooperatives, commercial breeders, and other stakeholders.

The DA's controlled rollout of the Vietnam-manufactured AVAC vaccine, which initially [focused on smallhold farms](#) in August 2024, has been [expanded to commercial farms and swine populations](#) under the DA's Integrated Swine Production Initiatives for Recovery and Expansion Program. The expanded coverage aimed to increase vaccination rates and facilitate assessment of vaccine's efficacy against ASF. According to the [DA](#), the government ordered 500,000 doses of AVAC vaccine, 150,000 of which are expected to arrive in August 2025.

<sup>1</sup>A barangay is a Filipino term for a village. It is the smallest political unit in the Philippines.

Figure 4. Active ASF Case Comparison, July and August 2024 versus 2025



Source: [BAI](#)

Meanwhile, the swine sector is still waiting for the commercial rollout of ASF vaccine. Some industry contacts, who previously operated commercial farms and were affected by the first ASF outbreak, remain cautious and have not yet considered reviving their pig operations due to the challenges in managing ASF.

In May 2025, the DA and Food and Drug Administration (FDA) renewed commitment to improve collaboration on animal disease vaccines. The two agencies discussed updates on ASF vaccine candidates and possible commercial rollout of the vaccine by end of 2025. Two [other vaccines](#) are reportedly undergoing clinical trials in compliance with FDA regulations prior to their commercial use in the country.

Complementing DA's vaccine program are ASF testing kits developed by the Philippine Department of Science and Technology (DOST). Announced in August 2025, the [DOST](#) mentioned that the kits allow "rapid, accurate, and high-quality DNA extraction from the blood samples of potentially ASF-infected pigs." Additionally, these kits are described as user-friendly, optimized for locally circulating ASF strains, and designed to support on-site testing in veterinary and agricultural settings.

#### *Strengthened biosecurity measures and improved technologies will facilitate recovery*

Industry contacts shared that hog raisers are exchanging biosecurity practices among each other to protect their herds and reduce ASF spread. Development partners have also extended training to smallholder hog farmers, helping them become biosecurity champions in their communities.

Among semi-commercial and commercial farms, industry contacts reported the conduct of laboratory testing of inputs (e.g., corn, soybean meal, and additives) to be used in feed production, implementing stricter protocols for personnel assigned in feedmills and farms, and using Polymerase Chain Reaction (PCR) testing to detect presence of the virus in swine herd, contributing to strong biosecurity.

Some industry players are also adopting improved swine genetics accompanied by optimized feed nutrition and rations to increase the liveweight and carcass recovery, supporting pork production growth for 2026 onwards. However, such practices among commercial farms may take years to offset the decline in production among smallhold farms.

## Consumption

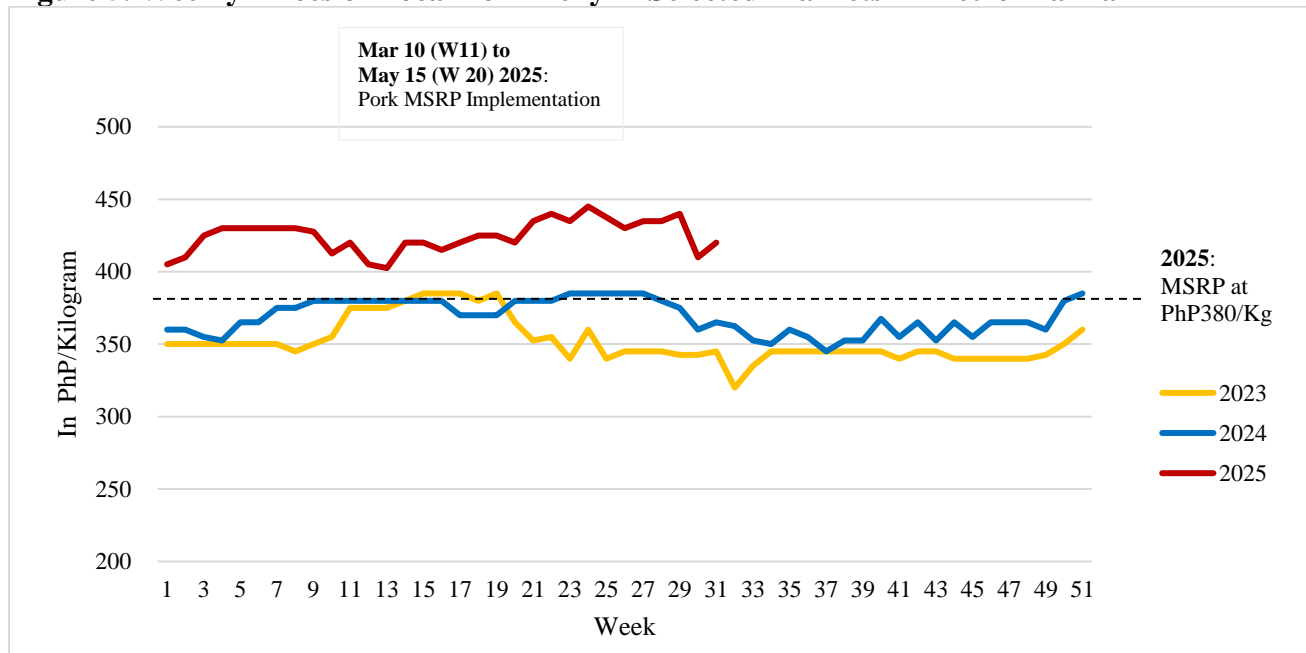
FAS Manila forecasts 2026 pork consumption at 1.73 million MT CWE, higher by 4 percent compared to 2025, supported by the sustained increase in population and robust economic growth. According to the [U.S. Census Bureau](#), the Philippine population in 2026 is projected at 121.9 million, representing approximately 1.5 percent year-over-year growth. The [Philippine economy](#) is projected to expand by at least 6 percent in 2026, maintaining its position as among the fastest-growing countries in the Southeast Asian region.

Additionally, the [Philippine Central Bank](#), locally known as Bangko Sentral ng Pilipinas (BSP), reported higher spending for food and non-alcoholic beverages, and restaurant and hotel services as inflation further eases. BSP projects inflation in 2026 to settle within 2.0-4.0 percent range.

### Government implemented measures to cushion the impact of high prices on consumers

Pork remains one of the top protein sources for Filipinos, despite a surge in prices caused by limited local supply (**Figure 5**). To mitigate the impact on consumers, the Philippine DA introduced a [maximum suggested retail price \(MSRP\) for local pork products](#) (e.g., pork belly, leg or ham, and carcass) sold in wet markets in Metro Manila, effective March 10, 2025. However, the MSRP was enforced for only two months due to low compliance rates among retailers as traders continued to set higher prices.

**Figure 5. Weekly Prices of Local Pork Belly in Selected Markets in Metro Manila**



Source: [DA](#)

Note: The MSRP of pork belly is about USD6.6 per kilogram.

The DA continues to explore mechanisms to make more affordable pork accessible for consumers. These efforts included an agreement with a major swine industry player to deliver live hogs at a discounted price, which were then slaughtered and sold in wet markets. The government targets to intensify its efforts and purchase more pigs from other local farms.

Additionally, the DA began selling fresh pork through government-subsidized retail stores known as Kadiwa. The Kadiwa initiative aims to provide consumers with lower-priced agricultural products sourced directly from farmers and fisherfolk.

**Pork Products in a Kadiwa Store**



Photo credit: [Philippines News Agency](#)

### *Increased Availability of High-Value Pork Products Across Market Channels*

Vertically integrated industry contacts have expanded their range of offerings from fresh pork to value-added products like ready-to-cook and ready-to-eat meals. These products are increasingly distributed through a wide range of channels, such as wet markets, stand-alone meat shops, supermarkets, convenience stores, and online platforms.



## Trade

FAS Manila forecasts 2026 pork imports at 750 TMT CWE, a 7 percent increase compared to the 2025 estimate. Local production challenges, driven by an animal disease outbreak, combined with growing population demand, are expected to support increased importation.

Meanwhile, FAS Manila raises its 2025 import estimate to 700 TMT CWE, considering higher imports from Brazil – the Philippines’ largest market source (**Table 2**).

**Table 2. Global Pork Exports to the Philippines (MT CWE)**

Reporter	Calendar Year			January to June		
	2023	2024	% Change	2024	2025	% Change
Total	448,313	596,089	33	255,355	329,452	29
Brazil	137,586	276,866	101	87,964	178,758	103
EU 27	144,062	165,899	15	78,386	71,618	-9
Canada	110,716	100,611	-9	61,677	53,622	-13
United States	34,747	29,764	-14	15,070	14,652	-3
South Korea	5,662	8,968	58	4,266	4,295	1
United Kingdom	7,224	5,780	-20	3,868	4,046	5
China	70	91	30	49	29	-41
Taiwan	137	578	322	410	58	-86
Others	8,109	7,532	-7	3,665	2,374	-35

Source: [Trade Data Monitor](#)

### *Expanded Brazil market access enabled higher exports to the Philippines*

In 2024, the Philippine DA granted Brazil system accreditation to export pork, beef, and poultry meat to the country under [Department Order No. 3 \(2024\)](#). This accreditation expanded Brazilian exporters’

access to the Philippine market, supporting the forecast increase in imports for 2025 and 2026. From January to June 2025, Brazil accounted for more than half of the Philippine pork imports. Prior to system accreditation, only specific Brazilian meat establishments were authorized to export certain commodities to the country.

Brazil remains price-competitive, with its pork export prices consistently lower than those of other Philippine major trading partners. As a low-cost supplier, Brazil's pork shipments to the Philippines are expected to increase. Industry contacts within the domestic food processing sector have acknowledged that Brazil's pricing advantage will continue to drive demand for its pork products.

#### *Imported pork from other trading partners may decline*

European Union (EU), Canada, and the United States are expected to remain key sources of pork imports for the Philippines. According to the latest short-term outlook of the [European Commission](#), the decline in breeding sows in December 2024 and risk of ASF outbreaks may result in lower pork production in EU. Such production decline and less competitive EU pig meat prices are expected to translate to lower export volumes to the Philippines in 2025 and 2026. A similar trend is anticipated for Canadian shipments. Meanwhile, pork imports from the United States are forecast to increase in both 2025 and 2026.

#### *Reduced tariffs continue to facilitate import arrivals*

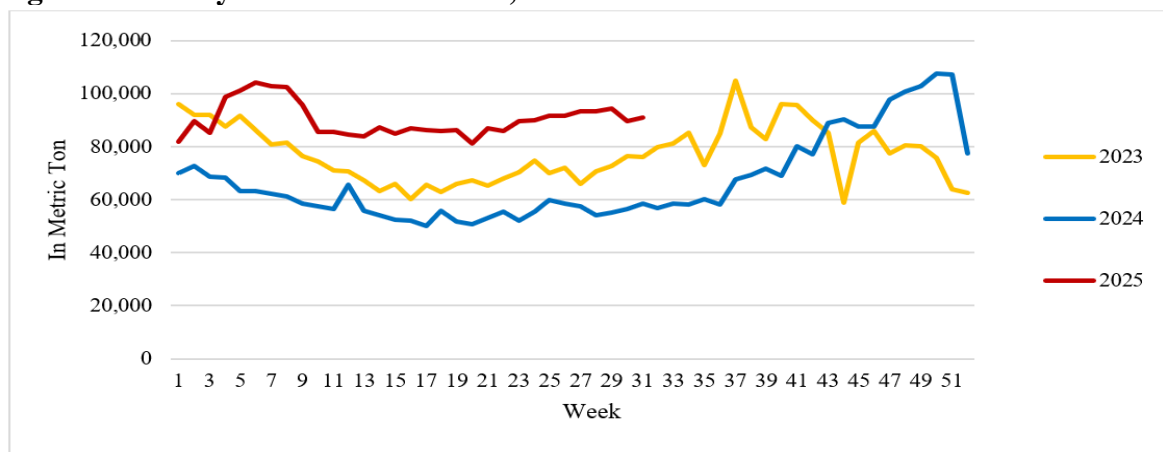
The lower tariffs under [Executive Order No. 62 \(2024\)](#) continue to facilitate trade and augment the local supply of key agricultural commodities such as pork. This Executive Order reduced the most favored nation (MFN) tariff rate on meat of swine to 15 percent (in-quota) and 25 percent (out-quota) from 30 percent (in-quota) and 40 percent (out-quota), respectively. These reduced MFN duties for pork imports will remain in effect until 2028.

### Stocks

Frozen pork inventory in accredited cold storage warehouses in 2025 is generally higher than in previous years amid the increased volume of pork import arrivals (**Figure 6**). A typical buildup of stocks is expected ahead of the November and December holiday season. However, FAS Manila forecasts that stocks ending in 2026 will be at 80 TMT CWE percent, lower than previous year as demand outpaces local supply.

Pork stocks in cold storage warehouses are primarily imported. Industry contacts involved in meat processing report maintaining approximately six months' worth of inventory in cold storage to minimize disruptions during trade uncertainties, such as temporary import bans caused by animal disease outbreaks.

**Figure 6. Weekly Frozen Pork Stocks, 2023-2025**



Source: [National Meat Inspection Service](#)

## II. BEEF

**Table 3. Beef PS&D in the Philippines**

Meat, Beef and Veal Market Year Begins	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Philippines</b>						
<b>Slaughter (Reference) (1000 HEAD)</b>	0	0	0	0	0	0
<b>Beginning Stocks (1000 MT CWE)</b>	0	0	0	0	0	0
<b>Production (1000 MT CWE)</b>	182	182	184	182	0	182
<b>Total Imports (1000 MT CWE)</b>	276	276	285	290	0	300
<b>Total Supply (1000 MT CWE)</b>	458	458	469	472	0	482
<b>Total Exports (1000 MT CWE)</b>	1	1	1	1	0	1
<b>Human Dom. Consumption (1000 MT CWE)</b>	457	457	468	471	0	481
<b>Other Use, Losses (1000 MT CWE)</b>	0	0	0	0	0	0
<b>Total Dom. Consumption (1000 MT CWE)</b>	457	457	468	471	0	481
<b>Ending Stocks (1000 MT CWE)</b>	0	0	0	0	0	0
<b>Total Distribution (1000 MT CWE)</b>	458	458	469	472	0	482
(1000 HEAD) ,(1000 MT CWE)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

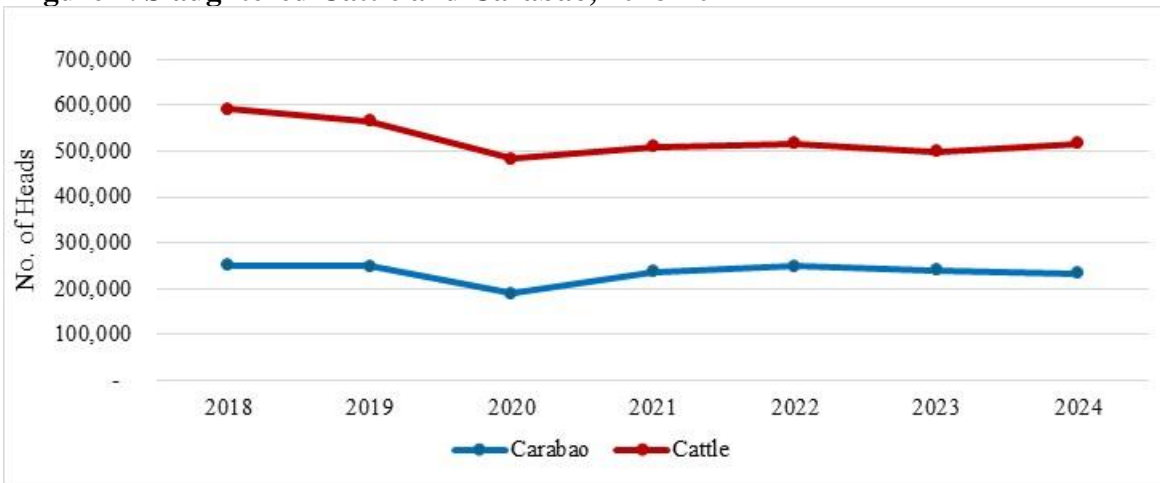
Note: Not USDA official data.

## Production

FAS Manila forecasts beef and carabeef production in 2026 at 182 TMT CWE, unchanged from the 2025 estimate. Over the past three years, total slaughter has remained flat, while inventory has shown a marginal decline (**Figures 7 and 8**). Production in the Philippines continues to face constraints due to limited land suitable for cattle raising. Industry contacts note that the conversion of agricultural land for residential and commercial use poses a threat to the local cattle industry.

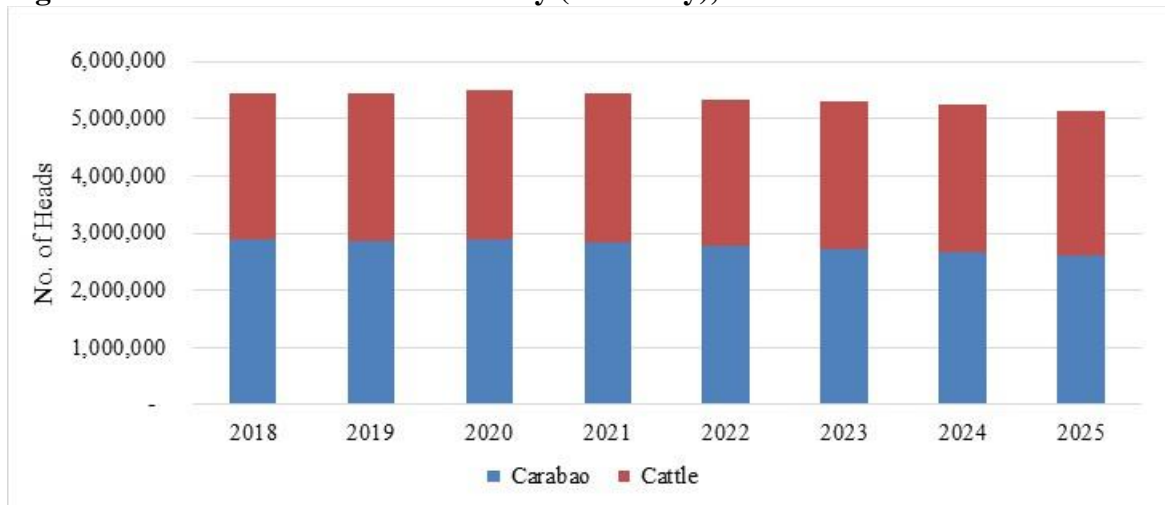
FAS Manila revises its 2025 production estimate to 182 TMT CWE as total cattle and carabao production for H1 2025 indicates only a minimal increase in output.

**Figure 7. Slaughtered Cattle and Carabao, 2018-2024**



Source: [PSA](#)

**Figure 8. Cattle and Carabao Inventory (as of July), 2018-2025**



Source: [PSA](#)

### *Impact of genetic improvement efforts yet to be observed in beef production*

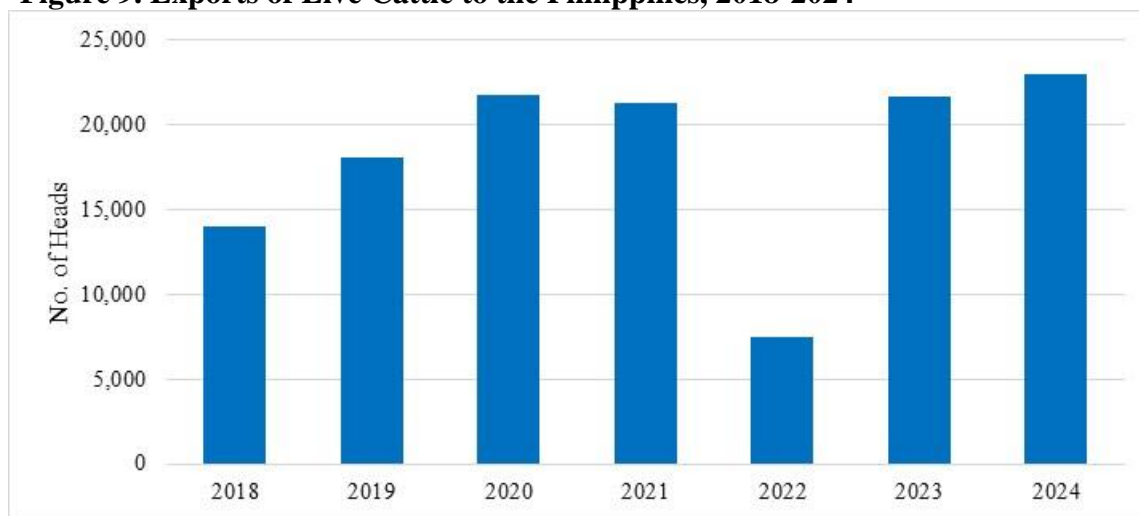
The local cattle and carabao industries have been pursuing measures to enhance herd genetics through artificial insemination (AI), with the goal of improving productivity and profitability. Industry contacts report the use of fixed-time AI, a reproductive technology that can shorten the breeding and calving period, improve fertility rates, and produce more uniform calves, among other benefits.

The Philippine DA also implements the [Unified Artificial Insemination program \(UNAIP\)](#), which focuses on the production and distribution of frozen semen straws to DA Regional Field Offices local government units, and AI technicians. The UNAIP primarily targets cattle and carabao. Additionally, the Philippine Carabao Center implements complementary initiatives to support genetic improvement.

These efforts are expected to support the long-term growth of the beef and cattle sectors; however, they are unlikely to impact 2026 meat production.

Meanwhile, there has been an increase in the importation of cattle genetics and live animals (**Figure 9**). This has not yet resulted in a meaningful increase in beef production, as smallhold farms continue to dominate, comprising more than 80 percent of the cattle industry.

**Figure 9. Exports of Live Cattle to the Philippines, 2018-2024**



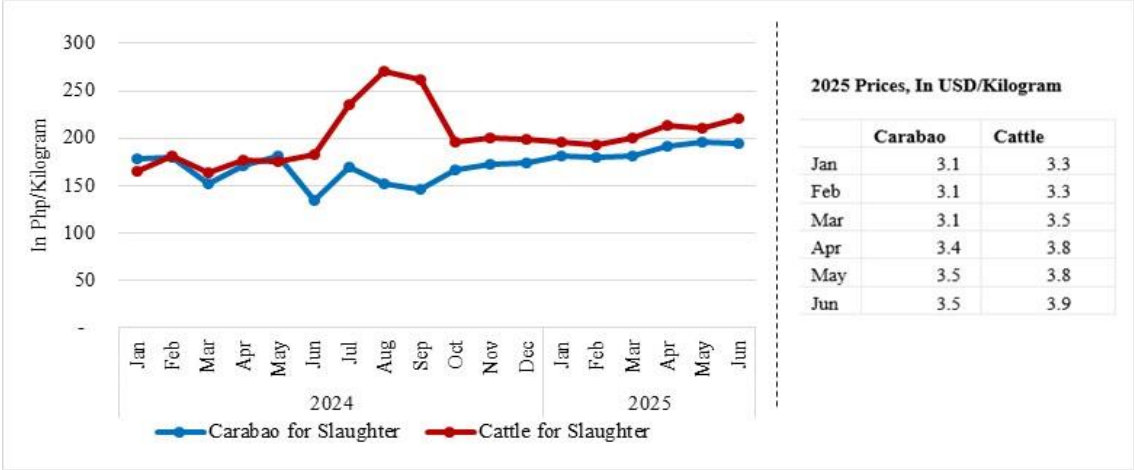
Source: [Trade Data Monitor](#)

### *Higher farmgate price increase indicates limited animals at slaughter age*

Farmgate prices of cattle and carabao for slaughter generally increased during H1 2025, rising by an average of 12-15 percent compared to the same period in 2024 (**Figure 10**). This increase in farmgate prices is due to a limited number of animals at slaughter age coupled with higher demand. During H1 2025, the number of slaughtered cattle and carabao decreased year-over-year by 4 percent and 18 percent, respectively (**Figure 11**).

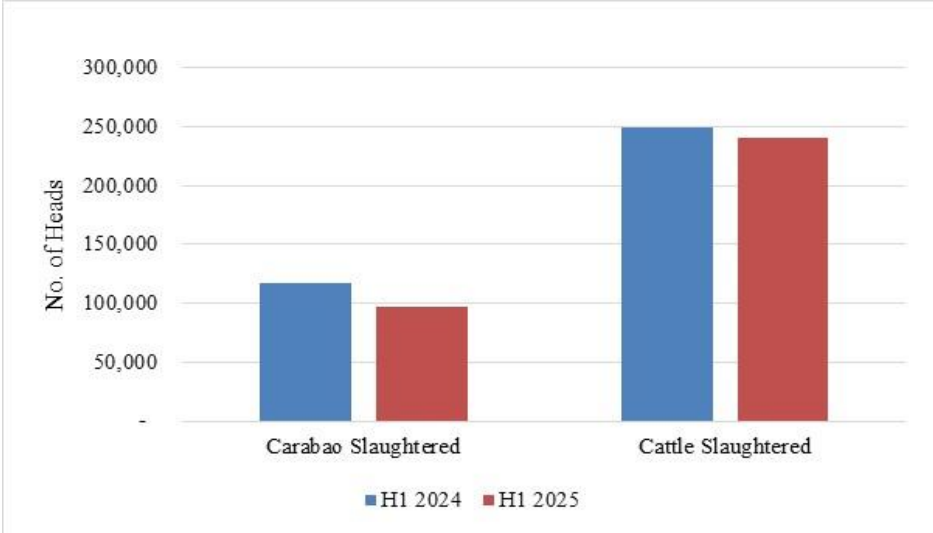
Considering the increase in farmgate prices and industry contacts' reports that input costs have remained stable, cattle and carabao raisers may have experienced some profit gains.

Figure 10. Monthly Farmgate Price of Cattle and Carabao for Slaughter, 2024-2025



Source: [PSA](#) (for farmgate price) and [BSP](#) (for exchange rate)

Figure 11. Cattle and Carabao Slaughtered, H1 2024-2025



Source: [PSA](#)

Consumption

FAS Manila forecasts beef consumption in 2026 at 481 TMT CWE, up 2 percent from the 2025 estimate of 471 TMT CWE. Economic and population growth in the Philippines will continue to drive consumption of food products, including processed meat and imported beef. Government measures to manage inflation are expected to support domestic demand, with overall inflation projected at 2.0-4.0 percent in 2026.

Growth in the food service industry

The country’s flourishing food service sector is also indicative of strong demand, including increased dining out and growing interest in exploring new cuisines and restaurants among the upper and middle-

class income groups. Illustrating this trend, several new restaurants featuring beef menus, primarily serving imported beef, have recently opened in Manila's business district in just the last year. See also FAS Manila's [Food Service - Hotel Restaurant Institutional Annual](#).

### *Expansion in meat processing*

According to [Euromonitor International](#), the market for corned beef – a popular processed meat product in the Philippines – is expected to grow due to consumers' preference for convenient meal options. The availability of corned beef across retail channels, such as supermarkets and community-based stores, facilitates consumption. Euromonitor International further reports that a leading player in the food industry will expand its corned beef product line, offering various culinary experiences with minimal preparation.

Industry contacts shared that local corned beef products use imported beef, typically brisket, trims, and fat. Brazil, Australia, and some European countries are the major suppliers of one of the country's established and widely consumed corned beef brand.

## Trade

FAS Manila forecasts 2026 beef imports at 300 TMT CWE, an increase of 3 percent compared to 2025. This growth is driven by increasing demand of households, food processors, and food services sector amid stagnant domestic beef production.

FAS Manila estimates 2025 imports higher at 290 TMT CWE, considering the latest import arrivals. Supporting this is the increase in market sources for imported beef as more foreign meat establishments have been accredited since 2024, while some temporary import bans were also lifted this year.

### *Wider market sources of imported beef*

Indian beef exports are expected to increase in 2026 following the Philippine DA's accreditation of 34 exporters to supply carabeef in December 2024. The [Philippine DA](#) underscored that the accreditation provides local food processors more options, including for corned beef production. India receives a preferential tariff under the ASEAN-India Free Trade Agreement. In 2024, Brazil was also granted systems accreditation for its beef, pork, and poultry exports to the Philippines expanding their market access. See also [Philippines: Livestock and Products Annual](#) in 2024.

As of July 2025, additional countries allowed to export beef to the country include Russia, Sweden, Uruguay, and Argentina.

### *Beef imports from traditional market sources*

Imports from Australia and New Zealand are expected to rise, despite declines in their market share. Australia and New Zealand continues to enjoy a zero-tariff advantage for beef exports to the Philippines. Meanwhile, U.S. beef imports will remain strong, considering Filipino's preference for U.S. products.

The [USDA's export sales](#) data as of August 7, 2025 further indicate that accumulated sales of U.S. beef muscle cuts to the Philippines rose by more than 20 percent compared to a year ago.

**Table 4. Global Beef /Carabeef Exports to the Philippines (MT CWE)**

Reporter	Calendar Year			January to May		
	2023	2024	% Change	2024	2025	% Change
Total	197,239	276,320	40	101,436	102,473	1
Brazil	76,591	125,503	64	36,136	36,425	1
Australia	33,692	51,686	53	17,783	20,087	13
India	52,055	46,606	-10	24,748	27,646	12
United States	13,678	19,473	42	8,077	7,717	-4
New Zealand	6,759	14,445	114	6,238	6,503	4
EU	12,893	15,351	19	6,987	3,173	-55
Canada	150	622	315	236	354	50
United Kingdom	1,020	1,150	13	1,051	260	-75
Japan	300	714	138	145	198	37
Others	101	770	662	35	110	214

Source: [Trade Data Monitor](#)

**Attachments:**

No Attachments