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# BUFFALO MEAT IMPORTS AND THE PHILIPPINE LIVESTOCK INDUSTRY: AN IMPACT ASSESSMENT

**SIKAP/STRIVE, Inc.**  
Livestock Development Council

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**PROCESO J. ALCALA**

*Secretary*

*Department of Agriculture*

## Message

The Department of Agriculture is now in the midst of seeking out new ways of doing things to ensure for our countrymen available, affordable, and safe food – always, and to provide our farmers, fishers, agribusiness entrepreneurs, and other stakeholders in the agriculture sector with viable opportunities for making decent and sustainable living out of agriculture. We are reviewing our resources, how and where we have spent and are spending these, and the impact we have had, as an institution, on the agriculture sector, both at the national and household levels. This review will run the gamut of our major programs and projects, as well as the policies which govern the way we do business with the different sub-sectors in agriculture. Ultimately, we do hope to be able to present to all Filipinos a more efficient and effective Department of Agriculture.

We therefore welcome the publication of this scholarly work which discusses one of the most important aspects of the country's sanitary and phytosanitary system – the importation of buffalo meat. The depth and range of the analyses conducted by the authors in investigating as many of the issues related to this import policy as possible should make it a valuable source material for us when we review this policy, together with all the programs and projects we have to develop to ensure the sustainability of the livestock sub-sector.

Our gratitude and congratulations go to the Livestock Development Council for having the foresight to support the work and the publication of its results.





**DAVINIO P. CATBAGAN, DVM**  
*Assistant Secretary for Livestock  
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## Message

The buffalo meat import policy has created substantial benefits for the country. It has provided the consuming public a cheap source of meat and, consequently, of protein. For the domestic meat processing industry, it has made available cheap and good quality sources of raw materials which have allowed it to increase production, not only of traditional products, but also of other products that would have been more expensive to produce had imported buffalo meat not been available. Its increased production has enabled it to generate more employment and increase economic activity in industries upstream from, and downstream to, it. The employment and economic activity the industry generated has resulted in multiple ripple effects that, in turn, generated more wealth throughout the economy.

It has been claimed, however, that the buffalo meat import policy has jeopardized the biosafety of the country. Buffalo meat imports have been alleged to have leaked into the wet markets. There have also been claims that the packaging materials in which buffalo meat is imported into the country have been inappropriately disposed of. These practices, if existing, increase the likelihood of the foot-and-mouth disease and other such biosafety hazards being introduced into the country.

This book contains the results of a study conducted by an eminent group of experts that investigated this import policy comprehensively. The study ran through the most important aspects of the policy, from the motivations both of the Department of Agriculture for formulating it and of those that opposed it; to how the DA has been implementing it; to the effects it has had on the livestock sub-sector, the meat processing industry, and the consumers. As a result of this comprehensive analysis, it has not only settled the more divisive issues that have haunted the policy but also identified legal and administrative inefficiencies in the way the policy has been implemented.

It is therefore a most welcome addition to the wealth of resources we can and must draw on as we at the DA continuously seek to be more effective partners with all the stakeholders in livestock industry in achieving a more expansive, inclusive, and sustainable growth for the whole sub-sector.



**MANUEL R. JARMIN**  
*Acting Executive Director*  
*Livestock Development Council*

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The Livestock Development Council takes pride in having commissioned this comprehensive assessment of the Philippine buffalo meat import policy. The sheer volume of information that it contains, coupled with the scholarly analyses on these information conducted by some of the most eminent experts in the field, make it a must-read for all the stakeholders in the livestock industry, and the whole agriculture sector. What adds to the luster of this research is that it was done by a team that marries the deep theoretical foundations and extensive research experience of the academe, the practical experience of the private sector in engaging in livestock-related enterprises, and the intimate knowledge and experience in governing the livestock industry by members of the Livestock Development Council -- perhaps the first time such valuable assets have been brought together for such an important work.

This research work poses a challenge to the Livestock Development Council and the whole livestock industry. It has laid down a wide array of challenges that confront the whole industry and a correspondingly long list of recommendations on how these challenges can be met adequately and appropriately. These recommendations run the whole range of areas where deficiencies and inefficiencies in the implementation of the policy exist, from the legal, to the organizational, to the operational areas.

It is incumbent upon us, the Livestock Development Council and the units within the Department of Agriculture concerned with the livestock industry, to take a hard look at the results of the research, and then a harder look at the aspects of our implementation of the carabeef importation policy that the research found wanting. It then becomes mandatory that we roll up our sleeves and reformulate policies and approaches, restructure relationships, revise strategies and implementation modalities, and undertake other such forms of reform, when warranted. This we must, AND WILL, do so to ensure the integrity of our borders from the entry of diseases and pests that are harmful to the health of our human and animal populations, and the continued impressive growth and development of the livestock industry.

Our admiration and appreciation are extended to the members of the study team.

# PREFACE

This book records the results of the most comprehensive study so far on the buffalo meat importation policy in the Philippines and on the issues related to this policy. The study first recounted the circumstances that surrounded the formulation and subsequent implementation of the policy and then the processes and instrumentalities that were and are being used to implement it. In the process, it identified 13 deficiencies and inefficiencies at the policy level that need to be addressed. It then analyzed the risks the policy poses on the biosafety and food safety of the country. It did so through two means: qualitative risk assessment and best practices analysis. The qualitative risk assessment it conducted found that the release of the FMD virus from imported buffalo meat is probable through various pathways, particularly if smuggling and illegal trading in the commodity continues and unprocessed meat reaches FMD-free zones unchecked. The best practices analysis it undertook compared the current practices in the country in handling meat importations with those in Japan, Australia, and New Zealand. This analysis found that the country's current practices lag behind and that gaps exist in these practices.

The study also determined the impact of buffalo meat imports on the meat processing industry and found that substituting imported buffalo meat as raw material in hotdogs, corned beef, and luncheon meat will drive output prices up by at least 14% and with these products having elastic price elasticity, this would mean less demand for the product and a foregone revenue of P3.3 billion a year for the meat processing industry, a decline in employment, and lower tax revenues for the government from the meat processing industry. Using a modified FAPRI/CARD International Livestock and Poultry Model of the University of Iowa, a partial equilibrium, econometric, non-spatial policy model, the study also investigated the impact of the policy on the domestic carabao industry. It found that buffalo meat imports are positively correlated with increases in both caracow and non-caracow inventories. Finally, the study investigated claims that carabeef imports have leaked into wet markets, thus posing competition for fresh domestic pork and beef. By conducting surveillance and analyzing





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government records, it estimated that about 15% of the total carabeef imports in 2005 indeed leaked into wet markets.

Based on the outcomes of the extensive analyses it conducted, the study supported the continuation of the policy's implementation although it made 34 recommendations that would improve such implementation. These recommendations focus on (1) the manner by which the policy is being implemented and ways through which such implementation can better safeguard biosafety in the Philippines; (2) the strengthening of the legal framework for the policy; (3) the strengthening of the different government agencies tasked with implementing the policy and the better delineation of functions and improving of coordination among these agencies; (4) the streamlining of the procedures for importing buffalo meat into the country, in the process improving efficiencies and efficacy along the line; and (5) the improvement of border security operations, especially the infrastructure and facilities, operations, and manpower of the Veterinary Quarantine Office.

We offer our study in the hope that it acts as a catalytic to the changes that are urgently needed to safeguard our biosafety and food safety from the entry of FMD and other such diseases into the country through carabeef imports. We look to government, particularly the Department of Agriculture and those of its agencies directly involved in the governance of carabeef importation, to expend the required resources for the conduct of an objective, unfettered, and comprehensive review of the policy, giving due consideration to our study's findings and recommendations. We further look to these institutions to then implement the necessary measures to strengthen the integrity of our borders against the biosafety and food safety perils brought about by the import policy. We also look to the meat processing industry to likewise look at our study results and our recommendations, especially as these relate to the illegal trading of buffalo meat imports, and then opt for the long-term and sustainable measures instead of the quick and fast, but unsustainable ones. Finally, we look to the Filipino consumer to, instead of being silent and acquiescent witnesses, be watchful, relevant, and proactive participants in efforts to ensure that food safety and biosecurity in the country are safeguarded.

**THE AUTHORS**



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# LIST OF ABBREVIATIONS AND ACRONYMS

AFMA	Agriculture and Fisheries Modernization Act
AHRCD	Animal Health Regulation and Control Division (DA-BAI)
AIMS	AQIS Information Management System
ANZFA	Australia-New Zealand Food Authority
A.O.	administrative order
AQIS	Australian Quarantine Inspection Service
AusVetPlan	Australian Veterinary Plan
BAI	Bureau of Animal Industry (DA)
BOC	Bureau of Customs (Philippines)
BSE	Bovine Spongiform Encephalopathy
DA	Department of Agriculture (Philippines)
DAIM	Department of Agriculture Inspection Mission
EU	European Union
FAIN	Food Automated Import Notification
FAPRI/CARD	Food and Agriculture Policy Research Institute/ Center for Agricultural and Rural Development
FCC	Food Control Certificate
FDC	Food Development Center
FMD	Foot and Mouth Disease
FME	foreign meat establishment
GATT-WTO	General Agreement on Tariffs and Trade – World Trade Organization
HACCP	Hazard Analysis and Critical Control Point
HAIL	Hind-Agro Industries Ltd.
Hd	head
ICON	Import Conditions Database
IFIR	Imported Food Inspection Report
IHS	Import Health Standards
IMUC	Imported Meat Utilization Certificate
IVC	International Veterinary Certificate
kg	Kilogram
MAF	Ministry of Agriculture (New Zealand)
MAFF	Ministry of Agriculture and Food (Japan)

MHLW	Ministry of Health, Labor and Welfare (Japan)
M.C.	memorandum circular
MPP	meat processing plant
M.O.	memorandum order
MT	metric ton
NCR	National Capital Region
NFA	National Food Authority
NFSDC	National Food Safety Development Council
NGA	National Government Authority
NMIC	National Meat Inspection Commission
NMIS	National Meat Inspection Service
NVA	National Veterinary Administration
NVQS	National Veterinary Quarantine Service
NZFSA	New Zealand Food Safety Authority
OIE	Office International des Epizooties
PAMPI	Philippine Association of Meat Processors, Incorporated
PCC	Philippine Carabao Center
R.A.	Republic Act
RCR	resource cost ratio
RDA	recommended dietary allowance
RFU	regional field unit
SGS	Societe Generale de Surveillance
S.O.	special order
SPS	sanitary and phyto-sanitary
SRM	specific risk material
SUR	Seemingly Unrelated Regression
SWOT	Strengths, Weaknesses, Opportunities and Threats
TAHC	Terrestrial Animal Health Code
USDA	United States Department of Agriculture
VQC	Veterinary Quarantine Certificate
VQMILC	Veterinary Quarantine Meat Inspection and Laboratory Certificate
VQO	veterinary quarantine officer
WTO	World Trade Organization