

Philippine Agriculture Transformation: *Experiences and Reform Agenda*

April 22, 2025

The Philippine Rice Industry

The rice subsector plays key role for food security and livelihood



- Philippines is among top global rice producers
- 19 Million MT average production from 2017-2024
- USD 8.2 Billion of GVA (19% share to GDP)

Source: Philippine Statistics Authority



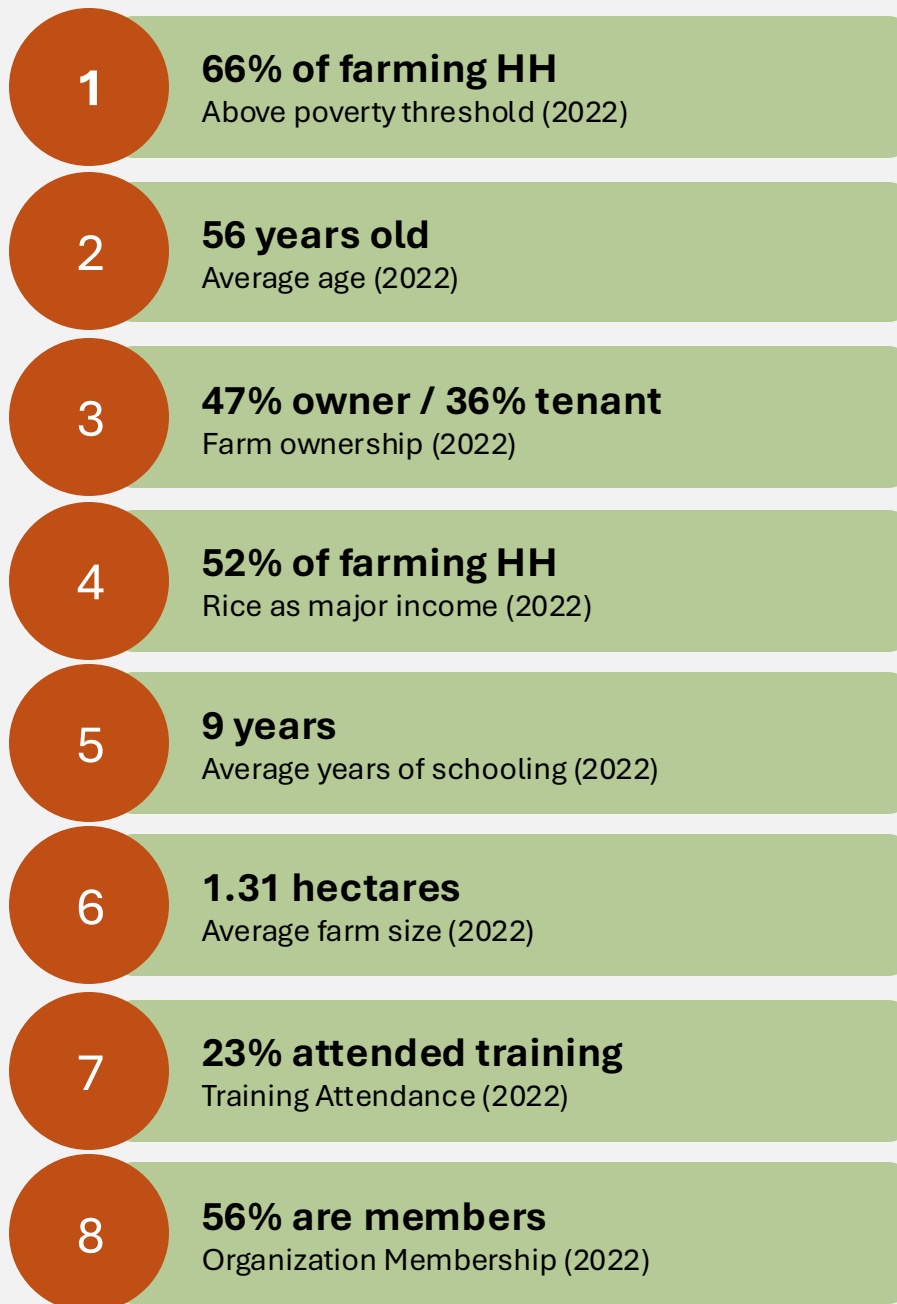
- 2.8 Million rice farmers
- USD 543.8 or Php 29,912 monthly earning per HH of five members

Source:
Registry System for Basic Sectors in Agriculture
Philippine Rice Research Institute

Rice Subsector Performance, average 2017 to 2024



4.76 million ha	4.08 mt/ha	77* percent
Area Harvested	Yield	Self Sufficiency

*Source: Philippine Statistics Authority, data as of 2022



Source: Philippine Rice Research Institute

Poverty Incidence and Malnutrition

17.54 Million Filipinos are poor in 2023	Magnitude (in Million)		Poverty Incidence (in percentage)		Subsistence Incidence (in percentage)	
	2021	2023	2021	2023	2021	2023
 Among Families	3.5	3.0	13.2	10.9	3.9	2.7
 Among Population	19.99	17.54	18.1	15.5	5.9	4.3

Source: Philippine Statistics Authority

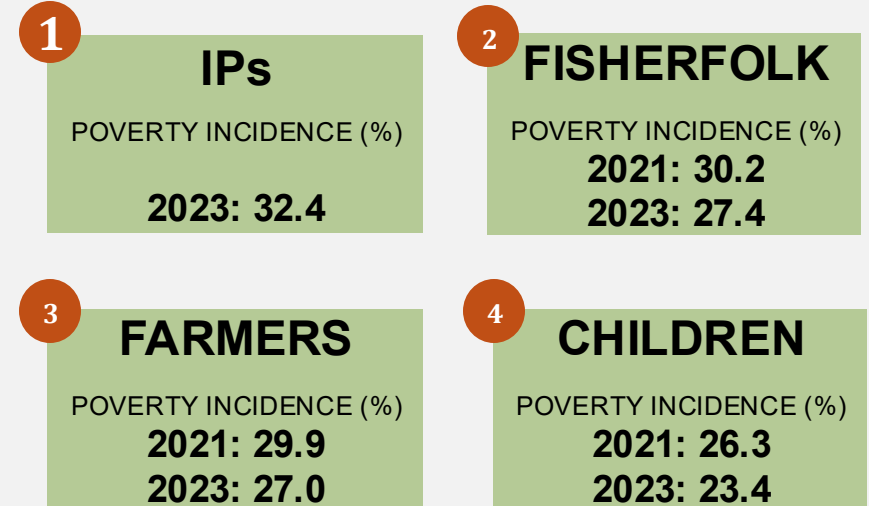
Prevalence of Malnutrition, 2022

Stunting is the country's top nutrition concern

Age Group	Underweight	Stunting	Wasting	Overweight
 0-23 months	12.3	21.6	7.2	3.6
 3-5 years old	19.7	26.6	4.8	5.9
 5-10 years old	20.8	19.7	6.9	14
 10-19 years old		22.3	10.9	13

Source: Food and Nutrition Research Institute

Fisherfolk & Farmer remain poorest among basic sectors in the country



58% of pinoy income is spent to food

of which: 22% for rice; 8% for fish; 4.9% for veggies

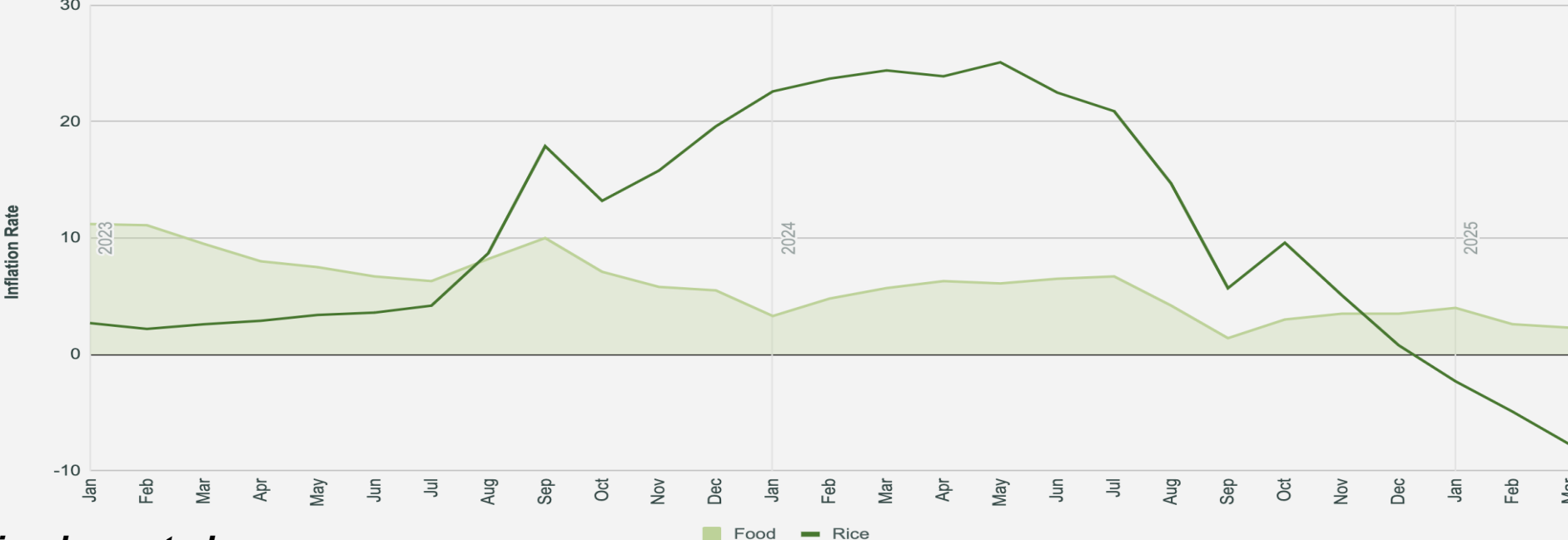
Wide consumer preference for unhealthy, low nutrient food products is linked to:

- hypertension
- diabetes and other chronic diseases
- malnutrition
- stunting
- other health concerns

Source: National Agriculture and Fisheries Modernization and Industrialization Plan

Inflation Situation and Policy Measures

Food inflation vs rice inflation from 2023 to Q1 2025



Government-implemented measures:

Source: Philippine Statistics Authority

Date	Order no.	Title / Details	Maximum Suggested Retail Prices (MSRPs) for Imported Premium Rice, (5% broken)			
			Date	Order No.	Php per kg	USD per kg
Jun 2024	EO 62	Modifying the Nomenclature and Rates of Import Duty	Jan 2025	AC 01	58	1.05
Sep 2024		DA Launch of the Agri-Puhunan Program	Feb 2025	AC 02	55	1.00
Sep 2024	RA 12022	Government passing of the Anti-Agricultural Sabotage Act	Feb 2025	AC 03	52	0.95
Jan 2025	AC 1-7	Imposition of Maximum Suggested Retail Prices (several issuances)	Mar 2025	AC 05	49	0.89
Feb 2025	DC 3	Declaration of Food Security Emergency on Rice ➤ Triggers the NFA-release of 150,000 MT of its rice buffer stocks	Mar 2025	AC 06	45	0.81

Thank you.

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