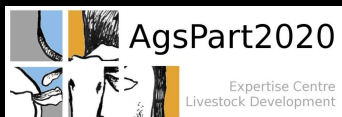


## 'AgsPart2020' and livestock development towards 2020 'duelling' or 'dualling' in the Philippines



creative approaches in product- and process quality

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www.AgsPart2020.com  
Presentation at the Inauguration of AgsPart2020  
Manilla; Dec 10th, 2008

## Outline of the talk 'dualling versus duelling'

- The centre, the scope and the partners
  - The background
- Problems and opportunities in the Philippines
  - Some Dutch experiences
    - We are not alone
    - What is next



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## 'AgsPart2020', the centre

- a virtual centre: slim, smart and flexible  
*(one coordinator with ad-hoc local staff and 'some Dutch')*
- first focus on topical issues identified so far  
*(fertility, feeding, breeding, etc. in dairy & beef, goats, buffaloes)*
- also focus on generic issues along the chain  
*(quality in value chains, resource use, processing, packaging..)*
- later: from product to process quality (GAHP / GAP)  
*(and/or to other sectors and/or beyond Philippines?)*

## First outline of activities

- 1st half year: further scans on critical areas identified thus far, workshops / training, etc.
- 2nd half year: partnering, deepening and/or broadening, start with business opportunities, courses, ...
- beyond 2009:
  - continued partnering / joint projects
  - process quality elaborated towards 2020
  - venture into other sectors (pigs, poultry, crops?)
  - venture into other regions (South East Asia?)

## The 'AgsPart2020' model ..

- used in many countries  
(China, Russia, Ukraine, Brasil, Netherlands ..)
- tested and known in business-consulting as well as work by private advisory services
- next step from 'the basics' to coping with variation  
(Filipinos know how to milk, etc.)
- crucial for 'tailor-made work with variation'

## Who are we and what's our track record?

[www.AgsPart2020.com](http://www.AgsPart2020.com)

- Netherlands Embassy – Agriculture Counselor
- Wageningen University
  - Animal Science Group
  - Wageningen International (former IAC!)
- Bohol-group - Filipinos from public & private sector
- PTC+ (the 'mother' institute of ITCPH)
- La Ventana ASA&D
- ... **your organisation ...?**



- The centre, scope and partners
  - **The background**
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## The Background

- start of ITCPH some 15? years ago
- ideas for similar project on dairy-cattle  
(Mindanao, due to possible funding)
- original project ideas were not taken up
- long time of in-action
- 2007: Adrie de Roo found ways to revive old idea  
(but beyond traditional development co-operation)
- 2008: feasibility and consultations  
(virtual vs. traditional centre; 'towards 2020')
- today: here we are ...
- tomorrow ...



- The centre, scope and partners
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- **Problems and opportunities in the Philippines**
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## 'problems and opportunities' an introduction

Philippine livestock industry is varied & fragmented  
It faces change & opportunity



## Some trends and priorities reasons to duel and/or to dual

- academic discussions on levels of X-breeding
- much private innovation; government tries to keep up
- confused discussion on New Zealand- vs other systems
- oil prices up, clean water scarce, poverty, ..
- more demand for fresh milk
- need for nutrient-management, GAHP / GAP etc..
- export of skills to New Zealand
- import of milk from New Zealand
- self-sufficiency or cheap milk from elsewhere
- local- vs national chains

### More opportunities

- basics are known, improve past or face the future
  - from production towards markets
  - from product to process quality
- from standard to tailor made approaches?
  - private and/or public?
- entrepreneurs and subsistence farmers?
- milk for commodity and for community?

from duelling to dualling  
from competing to complementing  
starting from strengths to work on weaknesses

### the Philippine livestock sector some strengths and weaknesses

#### Strengths

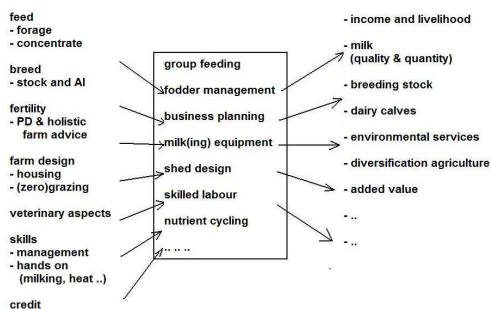
- dairy, beef, etc. is shown to be technically possible  
(Carnation / Philippine Dairy Corporation, Magnolia, Davao Dairies, Wagyu from Mindanao, Monterey feedlots, ..)
- we know how to milk, feed, breed, etc.  
(we even train people to go abroad)
- increasing market demand fresh milk
- expensive imports
- variable conditions, many opportunities
- .....

### the Philippine livestock sector some strengths and weaknesses

#### Weaknesses

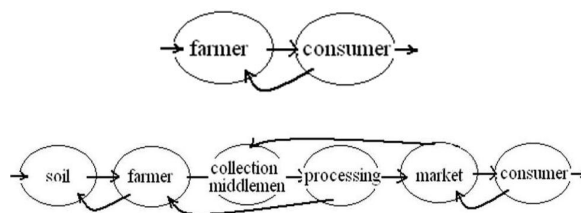
- climate & breeds do not favor livestock production
- product- and process quality just starting
- sector: fragmented and stagnating (past??)
- weak implementation of many (good) policies
- parts of the sector lacks self-confidence / tradition
- duelling vs dualling
- ..

### Identifying farm level action points breed, feed, farm size, fertilizer, health, markets & chains, process and product quality,



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### Short & Long Value Chains

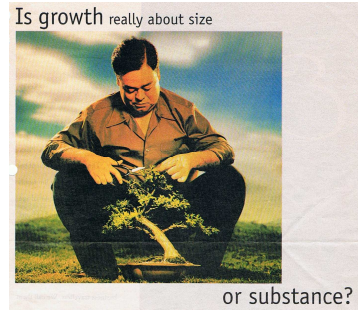


### Changes in Dutch livestock (... since I was a student)

	1970	2000	2020
Milk / cow / yr	5200	8600	10500
Piglets / sow / year	15	22	27
Fattening pigs			
- daily gain	620	750	825
- kg feed / kg gain	3.20	2.70	2.40
Broiler			
- gain / head / day	26	51	60
- kg feed / kg gain	2.10	1.60	1.40

based on Gert Hemke ([www.nutriconsult.nl](http://www.nutriconsult.nl))

### But:



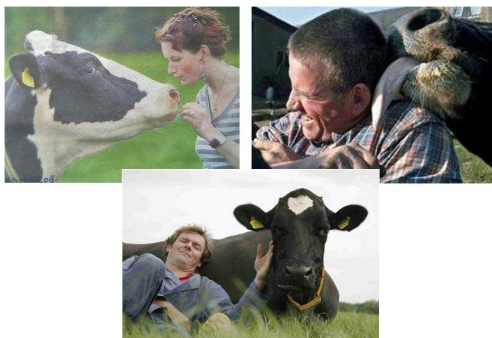
### some Dutch 'tricks' of the trade ...

- favourable climate and soils, tradition and good markets,
- good product quality and farmer organisation
- good roughage (grass, maize, fodder grains, new clovers)
- novel approaches in organic-, local- and broadened farming
- local chains, added value, dual approaches and multiple values
- increasing diversity in breeds ..
- highly developed diagnostics (at farm and national level) ..
- well developed registration and administration ..
- attention to waste stream management
- new R&D approaches, also for policy ..
- towards improved process quality

### holsteens and macheens ... a farm with 120 cows @ 9000 lts



### .. and there's more than holsteens and macheens ..



### Variation in (Dutch) dairy systems from conventional via multiple added value to organic



### (bio)diversity and breeding as innovation

there *is more* than Dutch holstein-friesian



### Dutch breeders can supply:

(from different countries)

- Black and white HF
- Red spotted HF and MRY
- Friesian Holstein
- Limousin, Blonde d'Aquitaine, Charolais
- Fleckvieh
- Jersey & Ayrshire
- Friesian Nellore

### Nutrient management as innovation

from >500 - <200 kg nitrogen/ha/yr

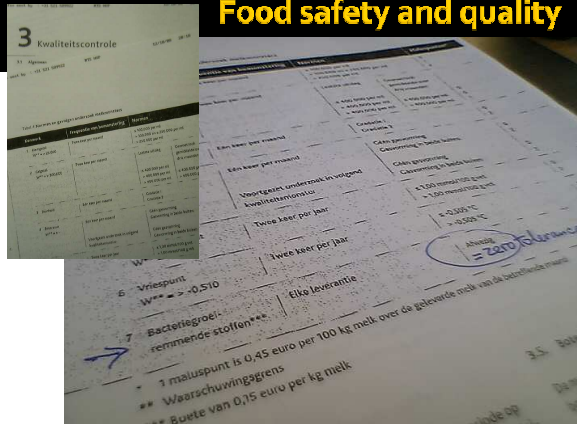


### Quality on the input side

putting waste streams to use



### Food safety and quality



### Food safety and quality

sector and national level





## Innovative scenarios for change in dairy by academics, consumers and farmers



## Innovative R&D systems



## We're also involved in

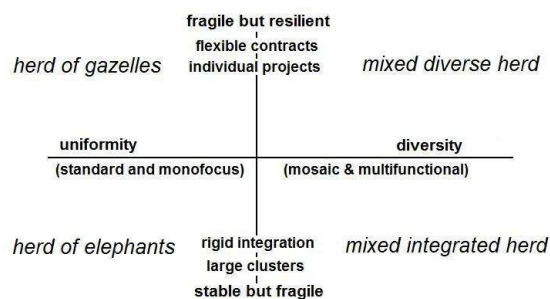


- Malaysia
- Brasil
- China
- Ethiopia
- Turkey

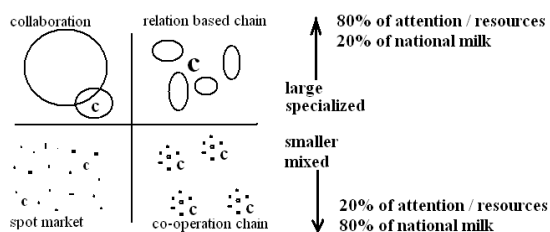


- at farm and national level
- commercial and community development
- ... as we are (of course) in the Netherlands

## Scenarios on country level a case from Malaysia



## Scenarios on resource use efficiency a case from China



## Brazil product and process quality

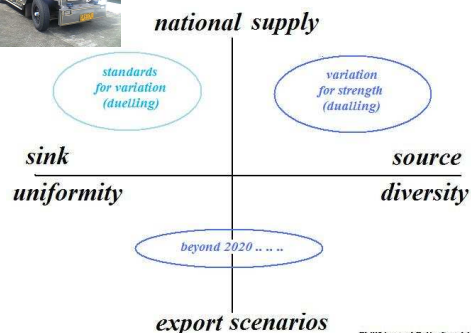


## Livestock & rural development



## More on scenarios

(a sketch for the Philippines)



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## We are not alone ...

and we do seek dualling ... no duelling

- **In the Philippines:**  
NDA, Nestle, Starbucks, PCC, DA, Dairycon, Badaco, KarlenMilk, OTOP, DTRI, Land'O Lakes, TetraPack, Ms. Yum, ..
- **In the world:**  
New Zealand, Australia, China, India, Europe, US, Brazil, Russia (not to speak of darker forces and the changing climate)

## hardware and software duelling or dualling



Intervet, Advance Consulting, van der  
Goudys, UT-Agro, Sprayfo, FMO  
Vriegen c.s., CAH, Kemke Consult, WI  
tSG, vdWoude-Sneek, Veepra, Mic  
ethusa & Van der, Van Aarsen



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### What's the need and what's on offer dualling rather than duelling on variation for strength

- work on diversity & change; dairy and meat; cows, buffaloes, goats ..
- work at farm level topics with local & national chains for product & process quality
- work on national level, consultancies / courses / workshops on topics identified
- focus on generic issues (quality, waste, transition, recycling, packaging, ..)
- eventually broadening in sectors and SEAsia region
- ...

### Short term actions

(till May '09 - laying a basis for later - an outline)

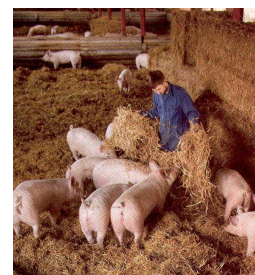
- 2-3 value chain quick-scans / action plans (local & national; private & public)
- 2-3 generic issue 'scans' (nutrient cycle, local markets, ..)
- 2-3 transition 'scans' (cane, ranches, estates)
- 2-3 topical 'scans' (fertility, milk quality, added value)
- 2-3 trainings / workshops (management, breeds, rural development)

### Mid term action 2nd part of 2009 and beyond

- Partnering
- Proceed on scans
- Initiate and start specific business and/or development projects
- Further develop courses / workshops ..
- *.. it takes two to tango!*

### Beyond 2009 including other sectors

poultry (by McDonalds & Tesco) and pigs (by farmer himself)



### Beyond 2009 including other sectors (meeting the need for water)



### Potential long term actions on process quality towards 2020

#### Technical ...

- nutrient-cycles and water use, from >500 to < 200 kg N/ha/yr
- quality control and diagnostics
- special feeds / supplements

#### Environmental ...

- improve waste management,
- environmental services (CO<sub>2</sub> sequestration, biodiversity, ..)
- improve biogas, resource use efficiency

#### Social ...

- multifunctional development, rural resilience / reconstruction
- variation and commodity / community
- policy design (participatory and use of planning models)



## So let's 'dual' ..

Maybe we have what you want,  
Maybe you need what we have.  
(paraphrased after Botica Pharmacy, Davao, Mindanao)



# AgsPart2020

Expertise Centre  
Livestock Development

## Thank you, on behalf of ..

the Dutch dairy community..



## ... and on behalf of my 'director'

