

## SWOT ANALYSIS

### Group 1

#### I. Individual Member Economy SWOT ANALYSIS

##### A. Brunei Darussalam

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <li>• One central government administration for livestock industry</li> <li>• Encourage ruminant farming for religious celebration</li> <li>• Halal meat and meat products</li> <li>• High demand of Halal livestock products for export under Brunei Halal brand</li> <li>• Government incentives e.g. subsidies on sale of live animals and medications to farmers</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of manpower (veterinarians and paravets)</li> <li>• Part-time farmers (hire foreign workers)</li> <li>• No farmer associations/no expert farmers</li> <li>• No R&amp;D</li> <li>• High cost of raw materials/production</li> <li>• Limited resources</li> <li>• Limited technology</li> <li>• Lack of important and relevant legislations</li> <li>• No specific bank of agriculture</li> </ul>	<ul style="list-style-type: none"> <li>• Continuing education (government-sponsored)</li> <li>• Hire consultants/experts (e.g. feed accreditation)</li> <li>• Diversification of economy other than oil and gas</li> <li>• Brunei Halal brand for global marketing</li> <li>• Exporting opportunities for Halal meat and meat products</li> <li>• Technological advancement (sharing of information)</li> <li>• Animal disease and quarantine order in progress</li> <li>• To improve GAHP</li> <li>• Government incentives</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of interest by younger generation</li> <li>• Fear of change from traditional farming to new technology</li> <li>• Diseases</li> <li>• High cost of animal feed</li> <li>• Depletion of non-renewable resources</li> <li>• Strict requirements by importing economies</li> <li>• High competition due to high cost of production</li> <li>• Expensive maintenance</li> </ul>

**B. Indonesia**

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Based on small holders farms</li> <li>• Availability of natural resources</li> <li>• Potential feed resources</li> <li>• High level of farmers interest</li> <li>• High level of local potential demands</li> <li>• Climate suitability</li> <li>• Support from government policies</li> <li>• Support for government investment</li> </ul>	<ul style="list-style-type: none"> <li>• Low levels of technology</li> <li>• Low level of expertise</li> <li>• Low genetic improvement</li> <li>• Feed processing ability</li> <li>• Low farmer incomes</li> <li>• Minimum transportation facilities for livestock</li> <li>• Lack of price signal</li> <li>• Lack of marketing board</li> <li>• Small scale farmers</li> <li>• Low livestock genetic quality</li> <li>• Lack of incentive</li> <li>• Low facilities and infrastructure for abattoir service</li> </ul>	<ul style="list-style-type: none"> <li>• Improving farmers expertise</li> <li>• Improving extension activities</li> <li>• Improving research based on local feeds processing availability</li> <li>• Improving price signal information</li> <li>• Improving transportation and infrastructure facilities</li> <li>• Improving local livestock genetics</li> <li>• Improving livestock industry</li> <li>• Import live livestock/embryo/semen for improving genetics</li> <li>• Import live livestock for fattening in Indonesia</li> <li>• Financial support availability</li> </ul>	<ul style="list-style-type: none"> <li>• Foreign competitor affect on product price in local market</li> <li>• Zoonosis diseases</li> <li>• Disease migration from import livestock</li> <li>• Natural hazard (volcano eruption, flood, tsunami)</li> </ul>

## C. Peru

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <li>• Use of renewable resources with potential to be used in different types of livestock</li> <li>• More than 80% of the agricultural units are engaged in cattle breeding</li> <li>• Presence of public and private institutions</li> <li>• Producer organizations with experience and in process of consolidation</li> <li>• There is a low in food safety and agro-alimentary safety regulation</li> <li>• Harmonization with Codex Alimentarius</li> <li>• Peru recognizes economy's international obligations particularly trade</li> <li>• Latest equipment generation in laboratories</li> <li>• Updated web pages</li> <li>• Recognition of credibility for its national and international technical and scientific character</li> </ul>	<ul style="list-style-type: none"> <li>• Limited technological and business knowledge</li> <li>• Informality in the agricultural sector</li> <li>• Poor infrastructure for water management, production and communication</li> <li>• High mini-fund subsistence economy</li> <li>• Limited credit</li> <li>• Degradation and inadequate management of forages</li> <li>• Lack of consumer safety education</li> <li>• Enough food safety inspector</li> <li>• Lack of budget to finance training and communication programs</li> <li>• Absence of traceability systems</li> <li>• Our legislation does not cover aspects such as fraud (product/labeling)</li> </ul>	<ul style="list-style-type: none"> <li>• Existence of a national and international market for livestock products</li> <li>• Political will exists to promote livestock development</li> <li>• Existence of technology globally and nationally likely to be replicated</li> <li>• Presence of research, education and training centers</li> <li>• Free trade agreements</li> <li>• Growing demand for safe food</li> <li>• Private laboratories accredited</li> <li>• Collaboration between the public, private and internationally organizations to train staff of official authorities</li> <li>• International support in international forums on food safety create opportunities for further growth</li> </ul>	<ul style="list-style-type: none"> <li>• Environmental degradation by pollution and irrational use</li> <li>• Extreme adverse natural phenomena changing and unpredictable</li> <li>• Unfair competition from subsidized imported products in their economy of origin</li> <li>• Rapid changes in international health policy can result in technical hampered Peruvian products in international trade</li> <li>• Insufficient budget in the agricultural sector to prevent and promote activities in food safety</li> <li>• No real statistics for decision making in relation to foodborne diseases</li> <li>• Impermanence of human resources trained in the regions</li> </ul>

**D. Philippines**

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Available competent personnel (government and academe)</li> <li>• Skilled livestock farmers and extensionists</li> <li>• Livestock associations at commercial level</li> <li>• Available indigenous genetic resources</li> <li>• Available feed resources for ruminants</li> <li>• Available area for growing livestock</li> <li>• Available credit institutions</li> <li>• Linkage to stakeholders</li> <li>• Available micro-financing</li> <li>• Technology commercialization financing program</li> </ul>	<ul style="list-style-type: none"> <li>• Weak HRD program</li> <li>• Low adoption of technology</li> <li>• Inadequate number of extensionists</li> <li>• Backyard raisers not organized</li> <li>• Lack of genetic/breeding base</li> <li>• Land tenure/urbanization</li> <li>• High turnover rate of trained manpower</li> <li>• Inadequate infrastructure facilities</li> <li>• Low adoption rate by small-hold farmers</li> <li>• Limited technology transfer</li> <li>• Export and import protocols not yet completely aligned to international standards</li> <li>• Insufficient quality assurance program/traceability/ accredited laboratories</li> <li>• Limited cash ceiling</li> </ul>	<ul style="list-style-type: none"> <li>• Global pool of experts</li> <li>• Institutions promoting GAHP</li> <li>• Animal genetic resources with potential market</li> <li>• Experiences of APEC members on GAHP</li> <li>• Creation of a program on the promotion, conservation and utilization of domesticated native animals</li> <li>• Open global market</li> <li>• Value adding</li> <li>• FMD and H<sub>1</sub>N<sub>1</sub> free</li> </ul>	<ul style="list-style-type: none"> <li>• Competitors</li> <li>• Disease outbreak/biodiversity</li> <li>• Zoning</li> <li>• Volatile market</li> <li>• Natural hazards due to climate change</li> </ul>

**II. COMMON SWOT ANALYSIS**

<b>STRENGTHS</b>	<b>WEAKNESSES</b>	<b>OPPORTUNITIES</b>	<b>THREATS</b>
<ol style="list-style-type: none"> <li>1. Government support</li> <li>2. Natural resources</li> <li>3. Experienced farmers</li> </ol>	<ol style="list-style-type: none"> <li>1. Technology availability and adoption</li> <li>2. Infrastructure</li> <li>3. Manpower</li> <li>4. Finance/genetics</li> <li>5. Legislation and enforcement</li> <li>6. R&amp;D</li> </ol>	<ol style="list-style-type: none"> <li>1. Information sharing/education</li> <li>2. Global and regional markets</li> </ol>	<ol style="list-style-type: none"> <li>1. Competition</li> <li>2. Natural disasters and diseases</li> <li>3. Environmental degradation/loss</li> <li>4. Cost of inputs</li> <li>5. Human resources</li> </ol>

## ACTION PLANS

### 1. Introduce government loans/subsidies/incentives

The group recognized that while there is existing government support in terms of providing a legislative framework, relevant policies, soft and hard investments and availability of competent personnel, it is also equally necessary to introduce other forms of support such as loans, access to credit or increase of credit ceiling to address high costs of raw materials/inputs or the cost of animal production in general. Farmer incentives were found to be lacking. Subsidies for example on the sale of live animals and animal medications to farmers were recommended. There is also a need for government to finance activities such as genetic transfer, improvement of livestock genetic quality and technology commercialization.

### 2. Seek international aid and support for training of farmers, extension workers, food safety inspectors and exchange program

The group further recognized that economy governments more often than not do not have sufficient funding to support activities related to improving their respective GAHP programs. Farmers and government personnel also do not have the required level of expertise. Thus there is a need to solicit support from international organizations to train farmers, extension workers and food safety inspectors. An exchange program of experts between and among APEC economies can also enhance competence of these relevant personnel.

### 3. Improve natural resources/pasture/forage

With the threats of natural disasters and diseases, depletion of non-renewable resources, environmental degradation and loss, and the harmful effects of climate change, it is deemed necessary to improve natural resources, pasture and forage. Sustainable farming practices should be adopted to replenish the depleting natural resources and further protect the environment.

### 4. Research and development - information sharing (rapid alert system for disease), WAHIS

Research and development on genetics and animal breeding technologies, disease management are still lacking in most APEC developing economies. There is a need to continue to share information on current issues related to animal diseases, researches and technologies through established networks such as the rapid alert system for disease and WAHIS.

### 5. Provide the necessary infrastructure – processing, abattoirs, fish farms

Currently, there is poor infrastructure for water management, animal production, abattoirs and facilities. It is suggested that priority should be given to provide infrastructures for animal farms, abattoirs and animal processing to ensure animal food safety and quality throughout the food chain and support the program.

### 6. Provide technology - seek international support for genetic improvement

Poor genetic quality and genetic improvement, lack of genetic/breeding base were identified as weaknesses in relation to animal genetics. International support may be sought to provide technology to improve local livestock genetics and import livestock/embryo/semens to improve current local genetics which may have potential international market.

7. Establish GAHP regional standard – for ease of trade

While most APEC economies have existing GAHP programs, it is necessary to establish GAHP regional standards to further facilitate inter and intra-trade within the APEC economies.

Economy standards harmonized to that of international standards will further increase market access.

8. Adopt and train, share experience/expertise on food legislation and enforcement

Current economy food legislations are not updated and some lack the important and relevant legislations. Legislations should be aligned to that of international standards. Considering the lack of expertise on developing up-to-date and relevant food legislation especially by developing APEC economies, it is recommended that they adopt best practices on food legislation (including enforcement regulations) of other economies. Training on food legislation of the APEC member economies is a venue to share experiences on their current food legislation.

9. Develop a response SOPs and preparedness on environmental disaster

Considering the inevitability of environmental disasters which may affect animal production, it is recommended that APEC member economies draft guidelines and procedures on environmental disaster response and preparedness. Best practices on disaster response and preparedness of APEC member economies and international organizations may be used to draft the proposed guidelines and procedures.