



# Policy Brief

SENATE ECONOMIC PLANNING OFFICE

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## Rice Tariffication: Why is it a necessary public policy?

*With 8.23 million “food-poor” Filipinos that represent 8.1 percent of the population and who spend as much as 30.6 percent of their total food expenditure on rice, shouldn’t the Philippine lift the quantitative restriction that makes its staple food very expensive?  
A public policy on rice tariffication may be necessary.*

### 1. Introduction

In international trade negotiations, tariffication is the term used to refer to the process of removing non-tariff barriers and converting these into equivalent tariffs – a tax imposed on imported goods and services. Non-tariff barriers include quantitative restrictions such as import quotas.

Currently, the only agricultural commodity in the Philippines that has a quantitative restriction (QR) is rice. This is in accordance with the government’s policy of self-sufficiency in rice because it is the country’s main staple. A rice QR allows the Philippines to prohibit rice imports from coming into the country beyond a minimum access volume (MAV).

The Philippines has a standing international commitment to tariffify its rice QR. However, it cannot do this immediately because there is a domestic law that needs to be amended in order to effect the said tariffication. Due to the urgency of the matter, the Legislative-Executive Development Advisory Council (LEDAC) has subsequently included the proposed amendments to the Agricultural Tariffication Act as part of the priority measures to be passed by the 17th Congress to comply with international trade agreements.

To better appreciate the need to pass a legislative measure to lift the QR on rice (i.e., rice tariffication), this paper aims to: (1) provide a brief history of agricultural tariffication and current status of the rice QR in the Philippines; (2) highlight the primary reasons and benefits that make rice tariffication really necessary, beyond trade agreements; and (3) point out the elements of a necessary public policy that would improve food security situations, reduce poverty, and improve food governance.



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## 2. Except Rice: Tariffication of Agricultural Commodities

The Philippines has committed to remove all non-tariff barriers in agriculture when it joined the World Trade Organization (WTO) in 1995. Before this however, quantitative restrictions (e.g., import quotas, import licensing, import prohibition) and other non-tariff measures restricted agricultural products from other countries.

When the Philippines opened up its agricultural market to other WTO member-countries, it established a tariffication system in 1996 through Republic Act (RA) 8178, otherwise known as the Agricultural Tariffication Act. It is the domestic law that implemented WTO provisions on agriculture for the Philippines. It repealed other laws including those: (1) prohibiting importation of onions, potatoes, garlic and cabbages (RA 1296); (2) prohibiting importation of coffee (RA 2712); (3) centralizing importation of ruminants for breeding, slaughter and beef (PO 1297); (4) authorizing the importation of foreign cigar leaf tobacco and blending services (PO 1483); and (5) that subjected importation to rigid conditions, e.g., sections of the Seed Industry Act, Magna Carta for Small Farmers, and Virginia Tobacco Industry Act (Aquino et al. 2013, 2).

Through RA 8178, all quantitative restrictions on agricultural products were converted into tariffs – except rice. The Philippines was able to negotiate for this “special treatment” under Annex 5 of the WTO Agreement on Agriculture (AoA). It granted the country an initial 10-year exemption for the lifting of the QR on rice and the subsequent conversion of this QR into a tariff. A rice QR allows the Philippines to prohibit rice imports from coming into the country beyond a MAV/in-quota.<sup>1</sup> The MAV then for the Philippines was 238,940 metric tons (MT) and the in-quota tariff was 50 percent.

<sup>1</sup> The MAV refers to the volume of rice that is allowed to be imported with a lower tariff committed by the country under the WTO.

<sup>2</sup> As provided in the Rectification and Modification of Schedule LXXV - Republic of the Philippines G/MA/TAR/RS/99/Rev.1 dated 27

This special treatment would have expired on 30 June 2005. The Philippines, however, negotiated to have the special treatment for rice extended by seven years or up to 30 June 2012.<sup>2</sup> The concessions given in return for this extension was an increase in MAV from 238,940 MT to 350,000 MT inclusive of country specific quotas, i.e., (a) Australia – 15,000 MT; (b) China – 25,000 MT; (c) Thailand – 98,000 MT; (d) India – 25,000 MT; and (e) open to all – 187,000 MT with in-quota tariff at 40 percent and out-quota at 50 percent (unbound).

For a second time, the Philippines successfully negotiated for a waiver that allowed the country to again postpone the tariffication of the rice QR from 1 July 2012 to 1 July 2017.<sup>3</sup> The concessions given for the waiver are shown in Box 1. These concessions would have had to revert to the 2012 levels after the waiver expired on 30 June 2017.

Box 1. Concessions given for the waiver	
<ul style="list-style-type: none"> <li>Increase of MAV for rice from 350,000 MT to 805,200 MT broken down as follows:</li> </ul>	
Australia	15,000 MT
China	50,000 MT
El Salvador	4,000 MT
India	50,000 MT
Pakistan	50,000 MT
Thailand	293,100 MT
Vietnam	293,100 MT
Open to all	50,000 MT
<ul style="list-style-type: none"> <li>Reduction of the in-quota rate on rice from 40 to 35 percent which is the same rate agreed under the ASEAN Trade in Goods Agreement (ATIGA);</li> <li>Reduction of tariff rates for certain non-rice products such as livestock, poultry, peas, potatoes, and oil seeds.</li> </ul>	

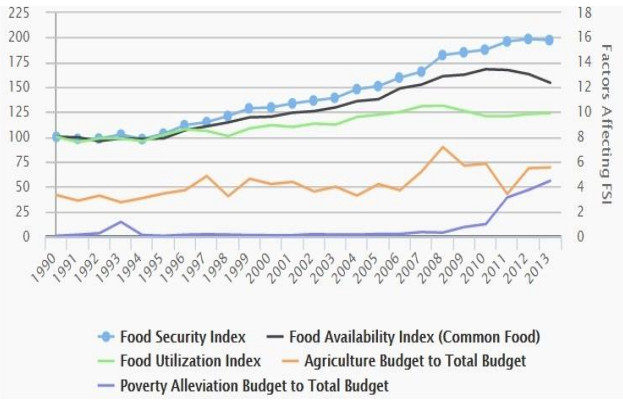
Source: DA 2017, 1

On March 2017, the Philippines notified the WTO that it will tariffy its rice QR once the waiver on the special treatment on rice expires on 30 June 2017. However, rice tariffication in the country cannot take effect until RA 8178 or the Agricultural Tariffication Act is amended. Only then will the Philippines comply with the WTO obligation.

September 2006 (the "Extension Agreement"), which was certified by the WTO under WT/Let/562 on 08 February 2007.

<sup>3</sup> As approved by the WTO in its decision on 24 July 2014 (WTO document WT/L/42).

**Figure 1. Situation of Food Security and its Determinants**



Source: PhilFIS, PSA 2014

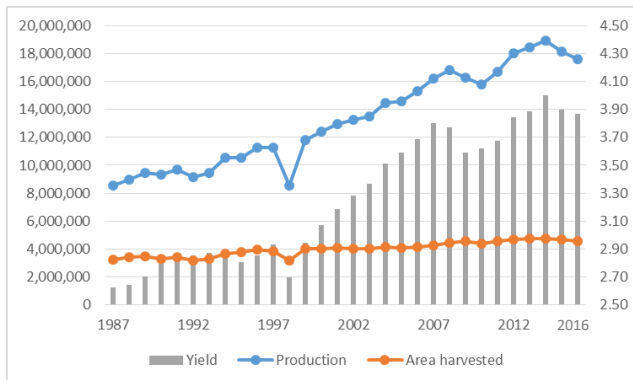
### 3. Reasons and Benefits of Rice Tariffication

Aside from the Philippines being bound to the WTO agreement, there are primary reasons and benefits that make rice tariffication necessary. Lifting the QR on rice would: (1) improve food security by improving the availability and access of rice; (2) reduce poverty by increasing the disposable income of poor households; and (3) dismantle state monopoly and improve food governance.

#### 3.1. Food Security: Enhancing Food Availability

Food security is said to exist “when all people, at all times, have physical and economic access to sufficient, safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life.” With this concept, the four pillars of food security are: (1) food availability, (2) food access, (3) food utilization, and (4) food stability (FAO 2009).

**Figure 2. Supply Trends in the Rice Economy**

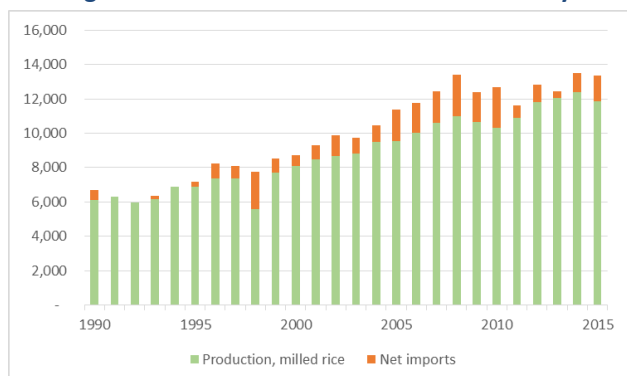


Source: Briones 2017, 14

Tariffication of agricultural commodities has improved the food security situation in the Philippines. Except for the slight downturns in the early 90s, the food security situation improved when it joined the WTO from 1995 onwards (Figure 1). The availability of major food items coming from both local and international sources contributed positively to this upward direction (PSA 2014).

Emphasizing the availability of food, regardless of whether it is produced locally or imported abroad, is a crucial aspect of food security that makes it different from “food self-sufficiency” – a protectionist policy of some countries in trying to produce all the staple food it requires to avoid importing such commodity from other countries. Tariffication thus can also improve the food security situation further by removing the restrictions on the availability of the country’s most important food staple—rice.

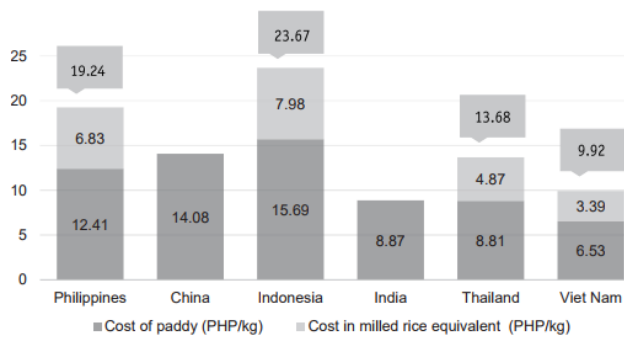
**Figure 3. Demand Trends in the Rice Economy**



Source: Briones 2017, 15

The local supply or production of rice (paddy rice) has been increasing in absolute terms (Figure 2). This has contributed, for example, to the country’s rice self-sufficiency ratio, which has improved from 88.93 percent in 2015 to 95.01 percent in 2016. While rice production has been increasing, it has been increasing at a slower pace, i.e., from an average rate of 4 percent in 2002-2008 to 2 percent in 2008-2014. This slower production growth rate has not kept up with growth in demand. Increasing imports from 1995 to 2010, for example, was necessary to cover for local production shortages (Figure 3). In 2016, the country’s annual per capita production fell by 3.12 percent from

**Figure 4. Comparative cost of producing 1 kilogram**



Source: Moya et al. 2016 In: Briones et al. 2017, 2

the 2006 base record of 115.35 kilograms. Tariffication will remove the artificial rice shortages created by the QR and enable the agriculture and trade sector to supply enough rice that is at pace with the country's population growth.

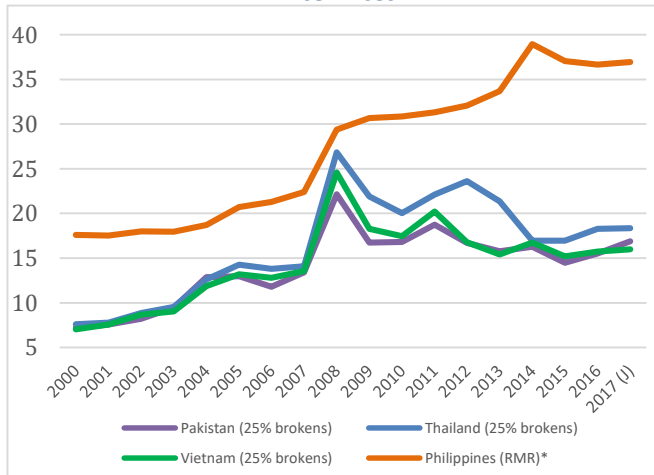
### 3.2. Food Security: Increasing Food Access

Another pillar of food security is food access. This refers to the affordability and allocation of food, as well as the preferences of individuals and households. Economic access of food depends on whether the household has enough income to purchase food at prevailing prices; and one of the determinants of food prices is the cost of production.

In the Philippines, growing rice is more costly because of the country's low competitiveness in rice. This is mainly attributed to: (1) the country's geographical attributes; (2) high labor costs, which comprise 41 percent of total rice production cost; (3) low share of rice area harvested to total crop area harvested; and (4) low rice production per person (Dawe 2012, 55). Figure 4 shows the comparative cost of producing 1 kilogram of palay for the period 2013–2014.

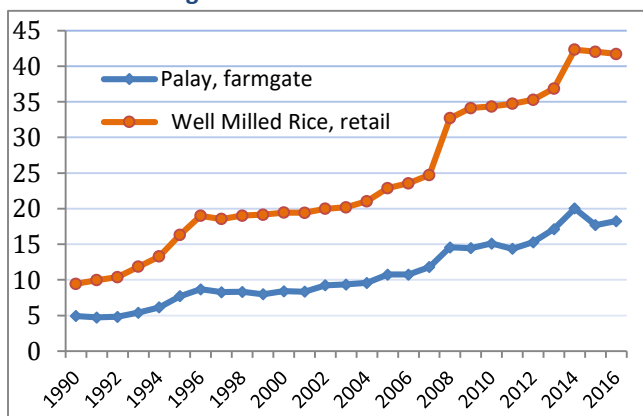
This low competitiveness and the imposition of the QR, which has limited the entry of cheaper rice imports, have translated to domestic rice prices that have been more expensive compared to other Asian countries. The price of rice in Thailand, for example, has declined by 31.7 percent since the World Food Crisis, from PhP26.8 per kilogram in 2008 to PhP18.29 per kilogram in 2016 (Figure 5). In comparison, the price of regular milled rice in the Philippines is double than that of Thailand at PhP36.7 per kilogram in 2016. Figure 6 shows that the nominal prices of paddy rice and well-milled rice have been increasing over time.

**Figure 5. Comparison of Local and Selected International Rice Prices**



Sources: FAO and BSP 2017 In: NEDA 2017, 4

**Figure 6. Nominal Price of Rice**

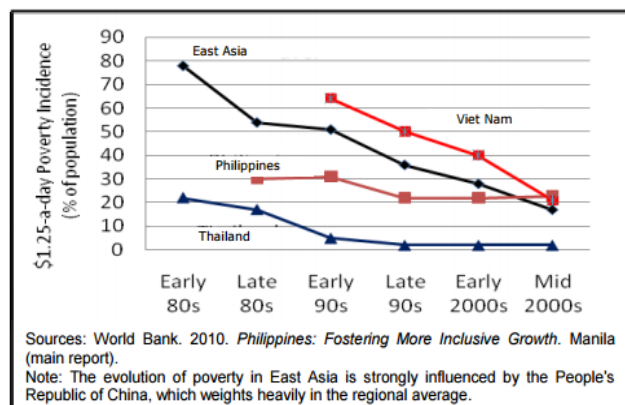


Source: PSA In: Briones 2017, 16 (updated)

Rice tariffication will eliminate the market distortions that currently affect the supply and demand of locally produced rice, which has made farmgate and retail prices of the commodity very high. According to Briones and Tolin (2016, 5), lifting the QR and tariffying rice imports (i.e., at 35 percent) could lower farmgate prices by PhP4.56 per kilogram and retail price by PhP6.97 per kilogram.

Contrary to earlier notions that the Philippine rice industry will bear the brunt of global competition without the rice QR, the National Economic and Development Authority (NEDA) said that prices of locally grown rice will actually be lower compared to the landed cost

**Figure 7. Poverty Incidence Comparison**



of imported rice if QR is removed. At 35 percent tariff, which is the current rate under the Association of Southeast Asian Nations (ASEAN) Free Trade Area, local farmers would have price advantage as compared to the landed cost (of imported rice) of about PhP4.00 per kilo and above; and about 35 of the country's rice producing provinces will be able to compete directly with their Vietnamese and Thai counterparts. NEDA, however, said that the 35 percent tariff remained a rough estimate, saying that the government's economic cluster will have to further study the impact of the ASEAN-level duty once the country undergoes the actual process of rice tariffication.

### 3.3. Poverty Reduction: Increasing Disposable Income

Poverty is highly recognized as the main cause of food insecurity. Achieving food security can only be possible if certain conditions in the economy are met. To a large extent, it is dependent on the rate of economic growth and the distribution of incomes in a country (Cabanilla 1999, 11).

Poverty reduction in the Philippines has generally been slow compared to other countries in the region; and this is partly explained by its slower pace of per capita economic growth compared with its neighbors (ADB 2011, 1).

From 1991 to 2012, the proportion of the poor people among the population declined from 34.4 percent to 25.2 percent or at a rate of only 0.4 percentage point per year. The poverty incidence inched upward on the years when the country was affected by political instability, natural disasters (volcanic eruption and earthquake), or a financial and energy crisis. In recent years, however, a relatively faster pace of poverty reduction has been seen. Comparing 2012 and 2015, poverty incidence decreased from 25.2 to 21.6 percent or at a rate of 1.2 percentage point per year (Table 1).

In 2015, the annual per capita poverty threshold or the minimum income required to meet the basic food and non-food needs was estimated at PhP21,753. On the other hand, the food threshold or the minimum amount needed to meet a person's basic food needs, was estimated at PhP15,189 (Table 1).

Based on these thresholds, it is estimated that 21.93 million Filipinos (21.6%) cannot afford to buy their basic food and non-food needs; and that 8.23 million Filipinos (8.1%) are subsistence poor (or food poor) as their incomes are not sufficient to buy even their basic food needs.

**Table 1. Annual Per Capita Poverty and Food Thresholds**

INDICATOR	1991	2012	2015
<b>Poverty Threshold and Poverty Incidence</b>			
Annual Per Capita Poverty Threshold (in Pesos)	5,949	18,935	21,753
Poverty Incidence of Families (%)	29.7	19.7	16.5
Poverty Incidence of Population (%)	34.4	25.2	21.6
<b>Food Threshold and Subsistence Incidence</b>			
Annual Per Capita Food Threshold (in Pesos)	4,135	13,232	15,189
Subsistence Incidence of Families (%)	14.4	7.5	5.7
Subsistence Incidence of Population (%)	5,949	10.4	8.1

Source: PSA 2015

**Table 2. Share of Rice to Total Food Expenditure**

QUINTILES*	Share of rice expenditure to total food expenditure (%)
1 (poorest 20%)	30.60
2	29.14
3	23.95
4	18.97
5 (richest 20%)	13.89
All	23.31

\*Quintiles are based on the national decile definition.

Source: PIDS based on FIES 2012 In: NEDA 2017, 5



With the increased rice supply and lower rice prices, tariffication essentially reduces poverty by increasing the disposable income of poor households, who spend as much as 30.6 percent of their total food expenditure on rice (Table 2).

This benefit will also be extended to rice farmers, especially the small ones, who are net buyers of the commodity and, hence, are currently consuming the relatively expensive domestic rice because of the QR.

According to Cororaton and Yu (2016, 19), eliminating the present rice QR is estimated to reduce poverty by 620,000; and retaining the protection on domestic palay production through tariffication (and earmarking the revenue generated as cash transfer to poor households) will reduce poverty considerably by 4 million in 10 years.

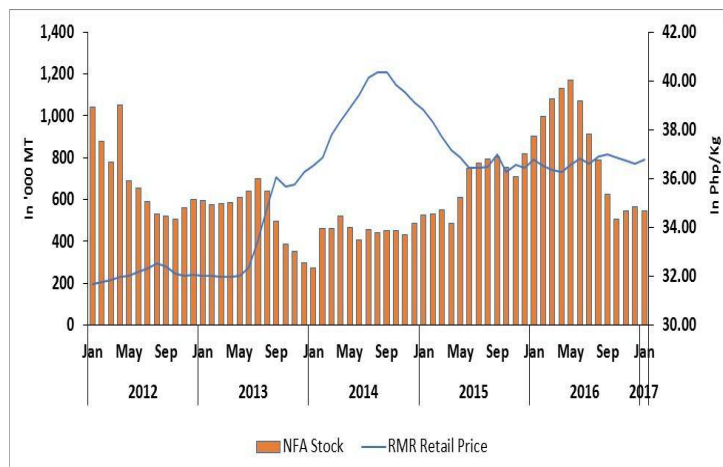
### 3.4. Dismantling State Monopoly and Improving Food Governance

The National Food Authority (NFA) undertakes a program of buying and selling palay and corn aimed to stabilize the price and supply of these staple commodities. The NFA buys palay and corn from farmers and farmers' organizations at a predetermined government support price. The NFA also sells rice and corn at prices that are affordable and available to the poorest consumers. It is also supposed to maintain a buffer stock of rice to provide an immediate supply during emergencies.

The Philippine government policy of "stabilizing" the price of rice, both for producers and consumers, has been proven to be very costly and difficult to implement efficiently and effectively. The NFA implements the price stabilization mandate by maintaining a high farm gate buying price for palay to ensure a reasonable return for farmers, while also selling rice at low prices to ensure the affordability for poor consumers. Figure 8, for example, shows what happened when rice imports were "restricted" in late 2013 to 2014. The price inflation of rice reached more

than 11 to 12 percent in 2014 due to the low level of NFA stocks.

**Figure 8. Retail Price of Milled Rice versus NFA Rice Stocks**



Source: PSA In: NEDA 2017, 2

Maintaining this policy has been a big burden to the national government, with the NFA requiring PHP44.535 billion in subsidy for the past 10 years. Despite these massive expenses, the NFA's ability to influence the price of palay for the majority of rice farmers has been negligible. At the same time, the NFA's program to distribute cheap rice to poor consumers has been hampered by poor targeting, substantial leakages and corruption. With government's resources already spread quite thin, there has been a longstanding concern that the NFA's current operations are far too costly and inefficient and that massive policy and institutional reforms need to take place immediately.

In case the NFA assigns import privileges to the private sector, tariffication avoids the perennial problem of allocating the import quota to private traders in a fair and transparent manner. The allocation problem poses a severe test to good governance, in as much as traders have the incentive of spending up to the amount of quota rent, in rent-seeking activity. Under tariffication, entry into the import business is liberalized, subject only to ordinary licensing, permits, and payment of custom duties.

#### 4. The Necessary Public Policy: Proposed Amendments and Farmer Support

The beneficial effects on food security, poverty reduction, and governance provide the compelling reasons for government to amend RA 8178 and tariffify rice.

In view of the possible delay of amending RA 8178, Malacañang issued on 22 May 2017 Executive Order No. 23 extending the concessions granted by the Philippines to interested trading partners. The extension shall be in effect for three years or until the enactment of a law removing the QR provisions of RA 8178, whichever comes first.

In the Senate, Sen. Ralph Recto filed Senate Bill (SB) No. 1476 which proposes to: (a) delete the provisions in RA 8178 that exempted rice from tariffication; and (b) reorient the role of the NFA solely for food security and national buffer stocking, i.e., removing functions that are inconsistent with a tariffied regime such as certifying supply shortages before allowing rice importation. Other key provisions include the:

- *Creation of a Rice Competitiveness Enhancement Fund (RCEF).* The RCEF will be created out of the tariff revenues of rice imports and will be used to: (i) directly support rice farmers, especially those who will initially be displaced by the removal of the QR; and (ii) provide funds for innovative undertakings that will further strengthen and modernize the rice industry, improve production efficiency, and develop value chain.
- *Formulation of a Rice Industry Roadmap.* The Department of Agriculture (DA) together with relevant agencies will have to formulate a Rice Industry Roadmap to spell out the critical interventions that need to be put in place to assist the small rice farmers, especially those that will be most affected by the tariffication.<sup>4</sup>

The said bill is currently being deliberated in the Senate Committee on Agriculture and Food, which initially recommended to include a provision that would state the maximum volume of rice that NFA can import for buffer stocking to address the issue of over importation by the agency in the past. According to NEDA, however, the inclusion of this provision may not be practical since the level of NFA buffer stocks may go lower than what would be stated in the amended law, given that the supply of rice will now be more available and accessible when the QR is removed. The NFA buffer stock is generally used for relief during calamities and disasters. The requirement for such calamities and disasters, however, is difficult to predict given the erratic intensity of typhoons, El Niño phenomenon, and other disasters. Based on the data from the DA, the volume of palay production losses since 2000 ranges from a low of only 80,724 MT (2007) to a high of 1,345,678 MT (2009). Should a maximum volume be deemed necessary notwithstanding these comments, NEDA suggests to set a maximum volume that is equivalent to the MAV of 350,000 MT, subject for review by the NFA Council as needed.

In the House of Representatives, the following House Bills (HBs) have been filed to amend RA 8178: (a) HB 4904 by former DA Secretary Arthur C. Yap; (b) HB 5023 by former President Gloria Macapagal Arroyo; (c) HB 5433 by Rep. Jose T. Panganiban, Chairman of the House Committee on Agriculture and Food; and (d) HB 5443 by Deputy House Speaker Sharon S. Garin. Currently, the House Committee on Agriculture and Food has already consolidated the four bills, and has scheduled technical working group meetings to further discuss the consolidated bill.

Aside from the proposed legislative measure, the government needs to come up with a program/roadmap that would form part of the public policy on rice tariffication, specifically to: (1) enhance the productivity and efficiency of the rice sector, and (2) put in place the needed support for affected farmers in the post-QR regime. In this

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<sup>4</sup> Last 21 March 2017, DA Secretary Emmanuel Piñol issued Special Order No. 358 which created a National Rice Roadmap Team.

program/roadmap, the DA in close collaboration with the Department of Agrarian Reform, Department of Trade and Industry, NEDA, Department of Science and Technology, National Irrigation Administration, Land Bank of the Philippines and other relevant agencies, should include the following activities:

- Increase rice yields by encouraging farmers to use high yielding inbred seeds and hybrid seeds. The soil analysis being done by the DA nationwide will help determine appropriate areas for cultivation of high yielding varieties to maximize production performance.
- Further develop irrigation systems to cover areas that have great potential to provide sufficient and sustained water to support crop/rice cultivation. The remaining area that can be developed for irrigation is about 1.32 million hectares out of the 3.0 million potential irrigable areas based on NIA.
- The availability and access to affordable credit can be revisited to support both production intensification and diversification. Hand in hand with credit is the up-scaling of insurance coverage to act as a safety net given the vulnerability of the agricultural sector to natural disasters and climate change risks.
- Strengthen extension services to facilitate the promotion and up-scaling of best practices and appropriate adaptation and mitigation measures to strengthen agriculture and enhance its resilience to climate change.
- Investment in infrastructure and post-harvest facilities, including farm-to-market roads and bridges, should be further increased. Investment to modernize post-harvest facilities should also be a focus. The rice mills are fairly modern, especially in Luzon, but drying methods leave so much wastage. Moreover, the government needs to encourage farmers to adopt farm machinery and equipment to lower production costs.
- Strengthen research and development (R&D) program to develop technologies and farm

practices that respond to changing environment, particularly continued uncertainties to climate change, pest and diseases and other natural disasters.

- Promote diversification to high-value crops, especially those that have greater potential for processing in uncompetitive provinces. In this case, DA's banner programs on high-value crops, livestock and fisheries should be provided greater focus to enhance participation of farmers in the commodity value chain.

## 5. Conclusion

The production of food as the most basic of human needs, and the goal of achieving food security for a population both define and summarize the very essence and importance of agriculture and agricultural trade in any economy. Since the Philippines and other developing economies are basically agriculture-based economies, where a large portion of its population, especially the poor, depends on food or food-related activities, the need to ensure sustainable agricultural growth and development becomes an imperative.

Ensuring sustainable agricultural growth and development, however, does not necessarily require the agricultural policy of equating food security to food self-sufficiency, which has been the longstanding basis for maintaining the QR on rice. Food self-sufficiency, unlike food security, is neither necessary nor desirable because a country can partially rely on imports to meet the national demand for food, especially if such country does not have the comparative advantage in producing such food crops (DA 2012, 8; Tiongco and Francisco 2011, 2).

Considering the advantages of tariffication, the Philippines should tariffy its QR on rice. The country should negotiate a tariff that offers equivalent protection to its producers as well as a schedule of reduction that would eventually improve the availability and affordability of rice to consumers, particularly the poor.



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