

출장결과보고

1. 출장목적: 필리핀 쌀산업과 관세화 관련 사항 조사
2. 출장자: 농업관측센터 박동규 선임연구위원
3. 출장지 및 기간: 필리핀 마닐라, 2014. 4. 27(일)~4. 30(수)(3박 4일)
4. 방문처(면담자)
 - 식량청 Atty Jose, Rice Watch Aurora 사무국장, Philrice Eufemio 부소장, KOPIA 여인수박사, IRRI Bruce 부소장
 - ※ Rice Watch는 시민단체, Philrice는 우리나라의 농진청에 해당, KOPIA는 ODA 사업 일환으로 필리핀의 쌀산업 생산성 증대를 위해 농진청이 Philrice에 설립한 사무실, IRRI는 국제미작연구소임

5. 주요 조사내용

<필리핀의 쌀 관세화 웨이버와 관련된 사항은 매우 민감하여 관련 공무원은 명확한 입장 표명을 기피함. 관세화로 전환하였을 경우 태국과 베트남 쌀의 수입량이 크게 늘어날 것을 우려하며, 경쟁력을 향상시키기 위한 시간이 필요하다는 입장>

<주요 면담 내용>

- NGO인 Rice Watch 사무국장(Aurora)은 필리핀이 관세화로 전환하면 가격과 품질 경쟁력이 있는 태국과 베트남 쌀이 대거 유입되고, 중장기적으로 필리핀의 식량안보 문제는 심각한 위협에 직면할 것을 우려함
 - 필리핀의 연간 1인당 소비량이 115kg으로 의미가 큰 품목임
 - 필리핀의 웨이버 요청이 WTO에서 부결되었음. 이유는? 태국에게 228,067톤(2013-14년), 293,100톤(2015 - 2017년) CSQ 제안하였으나 태국은 더 많은 물량을 요구함. 또한 미국과 캐나다 등은 가

금류 등 축산물에 대한 관세 추가인하를 요구하였으나 절충에 실패함.

- 일시적으로 웨이버를 통해서 쌀산업 경쟁력 제고가 필요하다는 주장(특히 관개시설 확충으로 생산성 제고가 필요하다고 강조함)하는데, 5년이라는 단기간에 경쟁력 향상이 가능할 것인가? 최근들어 정부 예산 중 관개시설 개선을 위한 투자액이 급증하였으며, 과거에 정부의 생산기반을 확충하기 위한 투자가 이루어지지 않은 것은 정부의 큰 실책임
- 필리핀 쌀가격이 태국이나 베트남보다 30% 정도 비싸므로 이들 국가로부터 연간 1~2백만 톤 정도의 쌀이 밀수입되고 있는 것도 적지 않은 문제점으로 지적함
- 관세화로 전환된다면 관세상당치는 어느 수준이 된다고 보는가?라는 질문에 국내외 생산비 차이 등을 고려해서 결정되어야 한다고 답변함(관세상당치에 대한 개념 부족으로 여겨짐)

※경제학계 등은 신문 기고 등을 통해서 경쟁력이 향상되기 위해서는 시장개방이 확대되어야 한다는 점을 강조함. 폐쇄적인 정책으로 인해 효율성이 떨어지고 밀수입 등이 늘어나는 부작용이 발생함을 지적함

※보도자료에 의하면 관세화 전환 시 TE는 40%로 여겨짐(붙임자료 참고)

- Philrice 부소장은 관세화 전환은 위험하다는 정부 입장과 동일하며 쌀산업 경쟁력을 제고하기 위한 생산성 향상을 위한 투자 확대가 시급한 과제를 강조함
- 필리핀은 지형적으로 섬이 7천 개나 되어서 경지면적이 협소한데다 인구는 많아서 전통적으로 쌀이 부족한 국가임(한 때 필리핀이 쌀 수출국이었으나 수입국으로 전락하였다는 일부 주장은 잘 못된 이해임)
- 태국과 베트남에 비해서 필리핀 쌀산업이 경쟁력을 가지기 위해서는 품종개량, 관개시설에 대한 투자 등이 필요함. 최근에 농업 예산 중 50% 정도를 관개사업에 투입하고 있음.
- 필리핀 쌀 생산비가 태국이나 베트남의 2배 정도이므로 물사용료

인하 등의 대책도 필요함

- 최근 3년동안 연간 생산성 증가율은 2.7%인데 반해 인구 증가율은 2% 정도여서 수급사정이 개선되고 있음
- 관세화로 전환된다면 관세상당치는 어느 수준이 된다고 보는가?라는 질문에 국내외 생산비 차이 등을 고려해서 결정되어야 한다고 답변, 관세화에 대한 이해가 부족하다는 느낌

○ IRRI 부소장은 필리핀이 웨이버를 요청한 상황에서 한국에 대한 조언 요청에 **“일본의 사례를 참조”**할 것을 권함

- 필리핀의 웨이버 요청은 매우 한시적이며 불가피한 조치라고 이해할 필요
- 쌀산업 대외경쟁력이 취약하여 관세화 전환 시 생산기반이 붕괴될 수 있다는 주장
- 단시간 내에 경쟁력을 가질 수 있는가? 2000년 필리핀, 태국, 베트남 단위(조곡 기준)는 ha당 각각 3.1, 2.6, 4.2톤이었으나 2012년에는 3.8, 2.8, 5.7톤으로 증가, 특히 필리핀 증가율이 상대적으로 높음. 태국의 단수가 정제된 반면 필리핀의 단수는 꾸준한 증가세를 보이고 있음
- 관세화로 전환된다면 관세상당치는 어느 수준이 된다고 보는가?라는 질문에 필리핀의 쌀가격이 높지 않았으므로 관세상당치 확보에 어려움이 있을 것이라는 소극적 답변.

<필리핀 쌀산업 개요>

- 필리핀은 2008년과 2010년에 쌀 수입량이 2백만 톤을 상회하였고, 국내 작황 호조로 2011년 수입량은 70만 8천 톤으로 줄어들었으나 이는 모두 MMA 35만 톤을 크게 초과한 수준임
- In-quoter에 대한 관세 40%, out-quoter에 대한 관세는 50%

<연도별 수입량과 MMA 물량>

	2005	2006	2007	2008	2009	2010	2011	2012
수입량(만톤)	182.2	171.6	180.6	243.3	175.5	237.9	70.8	100.9
MMA(만톤)	35							

- 필리핀 2010년 벼 생산량은 1,577만 톤이었으며 이 중 관개지역 생산량은 1,199만 톤이며 378만 톤은 천수답 생산량임
 - 2010년 벼 단수는 ha당 3.62톤이며 관개답 단수는 3.99톤인데 반해 천수답 단수는 2.81톤으로 관개답의 70% 수준임.

<벼 생산량>

	벼 생산량(백만 톤)		연간증가율(%)
	2000	2010	
전체	12.39	15.77	2.7
관개답	9.41	11.99	2.7
천수답	2.98	3.78	2.7

<벼 단수>

	벼 단수(톤/ha)		연간증가율(%)
	2000	2010	
전체	3.07	3.62	1.8
관개답	3.49	3.99	1.4
천수답	2.23	2.81	2.6

- 2016년까지 평균단수를 4.53톤/ha로 늘리고 벼 생산량을 2,273만 톤 생산하는 계획을 수립하여 추진 중에 있음
 - 2010년 천수답 비율 31%에서 2016년에는 23.7%로 줄여서 생산성 증대를 도모함

<벼 증산계획>

	2010	2012	2013	2014	2015	2016
전체						
단수(톤/ha)	3.62	4.03	4.23	4.43	4.48	4.53
수확면적(백만 ha)	4.35	4.58	4.74	4.85	4.94	5.02
생산량(백만 톤)	15.77	18.46	20.04	21.50	22.13	22.73
관개답						
단수(톤/ha)	3.99	4.46	4.66	4.87	4.90	4.93
수확면적(백만 ha)	3.01	3.27	3.50	3.65	3.75	3.83
생산량(백만 톤)	11.99	14.61	16.30	17.78	18.37	18.90
천수답						
단수(톤/ha)	2.81	2.95	3.02	3.09	3.16	3.23
수확면적(백만 ha)	1.35	1.31	1.24	1.20	1.19	1.19
생산량(백만 톤)	3.78	3.85	3.75	3.72	3.75	3.83

자료: 'Food Staples Sufficiency Program', Department of Agriculture, 2012.

붙임: 필리핀 관세화 관련 신문 기사

DA rejects Neda's proposal to drop rice QR talks

Details Category: Agri-Commodities 23 Mar 2014 Written by Alladin S. Diega / Correspondent



AGRICULTURE Secretary Proceso J. Alcala said on Friday the Department of Agriculture (DA) rejected the National Economic Development Authority's (Neda) proposal to drop negotiations for the extension of the country's quantitative restriction (QR) on rice and replace it with an equivalent tariff.

The DA chief told reporters on March 22 that they are holding back on discussions over the proposed trade policy reform, saying that their main focus is to get the extension for the special treatment on rice to protect local palay farmers from the influx of cheaper grains and ensure the government will meet rice self-sufficiency by end of 2015.

"We are on a wait-and-see posture, especially now that we are so close in securing the nod for our QR extension," Alcala said.

The DA chief was reacting to Neda's push for the shift to tariff as instrument of protection to local farmers.

Neda Director General Arsenio M. Balisacan made public the proposal on trade policy reform on Friday during a forum keynoted by Larry Wong, an expert in rice trade.

According to Balisacan, "the 'tariffication' of rice can alternatively replace QR with tariff equivalent of 40 percent."

According to the World Trade Organization (WTO), the Uruguay Round negotiations led to an agreement for a tariffication package, which provided for the replacement of agriculture-specific non-tariff measures with a tariff. According to the WTO, this "afforded an equivalent level of protection."

On March 22 Balisacan said revenues from customs duties could be used to subsidize poor consumers and develop a cash-for-work type of program for palay farmers.

In most of Asia and other developing economies, particularly the Philippines, rice is a commodity that has direct linkages to food security, livelihood security and rural development needs of millions, Wong said during the forum.

Currently, rice is the only commodity in the Philippines that enjoy special treatment in the WTO, which excluded the staple grain from the agriculture liberalization, in exchange for allowing other countries preferential treatment on several agricultural products entering the country, the expert added.

"We plan to keep it that way [QR on rice] until such time that our palay farmers are ready for trade liberalization," Alcala said.

Meanwhile, Agriculture Assistant Secretary Romeo Recide said they expect to conclude by April the negotiations for the extension of its special treatment on rice.

"We are very positive that we will acquire consensus with interested countries, which would allow us to operate under a new quantitative restriction extension."

Recide, one of the country's two lead negotiators for the Philippines mission to the WTO, added that they expect to wrap up negotiations for the QR extension when they meet with the WTO Committee on Trade and Goods on April 9 in Geneva, Switzerland.

The Philippines has been consistently lobbying with its Association of Southeast Asian Nations neighbors and other major trade partners, citing the need to prepare Filipino farmers for international trade and to achieve rice self-sufficiency.

Recide, on behalf of the Philippines, has been asking for a five-year QR extension until 2017.

But for the Philippines to get the nod on the QR extension, rice-producing countries affected by the restriction can request for concessions or market access for the importation of certain products, documents provided by Recide said.

Only four countries are still in negotiation with the Philippines, Australia, United States, Canada, and Thailand.

Last year, the Philippines acquired the endorsement of China, India and Indonesia for continuing the QR implementation.

"We're expecting to gain approval and endorsement of the CTG [Council for Trade in Goods]. In fact, we are urging them to progress speedily on their decision since we only have that much time [for the extension of the quantitative restriction]," Recide said.

"If there's no further opposition from the four remaining countries, then the WTO Committee on Trade and Goods will submit an official position to the General Council, which in turn will confirm the extension of our quantitative restriction until 2017," he added.

Customs chief shrugs off warning on QR issue

Details Category: [Top News](#) 20 Feb 2014 Written by Joel R. San Juan



Customs Commissioner John Sevilla on Thursday day shrugged off the warning aired by the Office of the Government Corporate Counsel (OGCC) that the country could face sanctions before the World Trade Organization (WTO) if it insisted on imposing quantitative restrictions (QR) on rice imports.

Sevilla said it is the legal opinion of the Department of Justice (DOJ), not the OGCC's, which is binding as far as his bureau was concerned.

"The OGCC is not the one that represents the BOC [Bureau of Customs]. I have yet to see the [OGCC's] legal opinion. We are awaiting the final opinion of the DOJ," Sevilla said.

The DOJ earlier issued its initial legal opinion on the issue by saying the National Food Authority (NFA) has no power to extend the imposition of QR on rice importations without approval from the WTO.

But Justice Secretary Leila de Lima said the DOJ and the Office of the Solicitor General would further study the issue before issuing a final legal opinion on the matter.

Sevilla said he would pursue the bureau's policy of "no import permit, no entry" despite pending action from WTO of the government's request to extend the QR.

In his legal opinion sent to NFA Administrator Orlan Calayag, Government Corporate Counsel Raoul Creencia noted that the special treatment on rice for the Philippines of the General Agreement on Tariffs and Trade-WTO already expired in June 2012.

Creencia said the insistence of the NFA to continue imposing the QR might prejudice other WTO member-countries and could prompt them to file a case before the WTO. He said an adverse decision on such disputes might result in a WTO-sanctioned retaliation against the Philippines. He said one of such sanctions could be the "withdrawal of tariff concessions by the complaining state determined to be equivalent to the economic effects of the offending statute."

In a 12-page confidential legal opinion addressed to Agriculture Secretary Proceso J. Alcala, de Lima said the NFA has no power to extend the imposition of the QR after the expiration of government's commitment to the General Agreement on Tariffs-WTO and Trade in June 2012.

De Lima said that while the agreement already expired, it had provisions saying extension of the QR on agricultural products "shall only be by agreement after the conduct of negotiations."

De Lima advised Alcala to honor PHL's commitment on rice QR

Details Category: [Economy](#) 09 Mar 2014 Written by Joel R. San Juan



JUSTICE Secretary Leila de Lima has admitted issuing a confidential 12-page document addressed to Agriculture Secretary Proceso J. Alcala, which contradicts his position that the National Food Authority (NFA) can still impose the World Trade Organization (WTO) quantitative restrictions (QR) scheme on rice importations despite its lapse in June 2012.

However, in an interview this week, de Lima clarified that she "only sent a letter and not a legal opinion."

The "letter," marked "confidential," was dated December 18, 2013, and addressed to Alcala. This is in response to Alcala's "request for opinion" on whether or not the expired QR can still be enforced by the government through the Department of Agriculture and the NFA.

In the said document, de Lima said the Department of Justice (DOJ) believes that the lifting of the WTO's QR should be observed.

"Therefore, it is our opinion that the WTO provisions on the lifting of QR, as well as their exceptions, and the provisions on negotiations for its extension are already Effective and should be complied with," de Lima said.

The WTO first granted the Philippines a 10-year "special treatment" for rice starting in 1995. Prior to its 2005 expiration, an extension was negotiated and granted in 2004. The said extension lapsed on June 30, 2012.

Even before the current negotiations for a second extension until 2017 were launched, the country had been denied twice on its appeals for postponement of the special treatment's expiration.

De Lima's letter was not made public as she said they would issue a more "definitive legal opinion" after considering "varying interpretations."

Stakeholders in the rice industry have been waiting for the legal opinion of the DOJ on the matter, which, they said, would serve as a guide for the courts in resolving petitions for injunction filed by rice importers.

"Since the Philippines's request for the extension of its QR on rice until 2017 is still pending, and there is thus no existing agreement to 'extend' such authority [or more accurately, grant a new one since the first one had already lapsed], the Philippines's government should honor and implement the effect of the expiration of the period granted to it..." she wrote.

However, Solicitor General Francis Jardeleza took a different stand on the issue when it filed a petition before the Supreme Court seeking to stop a Davao court from enforcing the writ of preliminary mandatory injunction it earlier issued ordering the Bureau of Customs to release rice imports it earlier seized due to lack import permits.

Jardeleza insisted that the authority of the NFA to require import permits for rice importations did not cease upon the expiration of the special treatment.

"With the ongoing negotiations for a waiver, there is effectively acquiescence by interested WTO member-countries to the continued imposition of quantitative restrictions on rice by the Philippines," the petitioners stressed.

De Lima, Alcala disagree on restrictions on rice imports

by Leonard Postrado
March 10, 2014

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The Department of Justice (DOJ) and Department of Agriculture (DA) are apparently at loggerheads over the issue on the lifting of the quantitative restriction on rice importations under the special treatment granted by the World Trade Organization (WTO).

Following the issuance of a DOJ legal opinion stating that the National Food Authority (NFA) has no power to extend the imposition of quantitative restriction, Agriculture Secretary Proceso Alcala wrote to Justice Secretary Leila de Lima defending that a "technical breach" of an international treaty is okay if no foreign government complains.

In his January 21, 2014 letter-response, Alcala took exception to the DOJ's recommendation that WTO provisions on the lifting of rice import quotas are "already effective and should be complied with."

He noted that since the negotiations for the extension of the QR were allowed by the WTO beyond June 30, 2012 "even with the expiration of the extension period... the QR remains in place."

"To subject rice importations to ordinary customs duties is tantamount to abandoning our request for extension of QR. No member-state would negotiate a QR extension if the Philippines has already lifted the same or impose customs duties in the interim," Alcala said.

Alcala's statement directly contradicted De Lima's assertion that the Philippine Government gave its consent to the WTO Agreement aware that the extension of its authority to impose QR on agricultural products like rice "shall only be by agreement after the conduct of negotiations."

De Lima stressed in a December 16, 2013 memo to Alcala that "since the Philippines' request for the extension of its QR on rice until 2017 is still pending, there is thus no existing agreement" to extend the NFA's authority to impose rice import quotas.

Alcala, on the other hand, pointed out that the government's efforts to put in place a new QR regime would be wasted if it will impose ordinary customs duties.

He noted that the country has actively sought consultations with other nine member states which have so far yielded positive feedbacks.

"To date, only the government of Thailand, United States and Canada have unresolved issues with the Philippines. But even with the unresolved issues with the three countries, the developments are encouraging," Alcala said.

"All these would be put to naught if the Philippines will agree to the position of a few individual private rice traders that the QR should be lifted," he added.

Negotiations for the extension of the QR will resume in April this year, with additional rounds in June and October.

The WTO first granted the Philippines a 10-year "special treatment" for rice starting in 1995. Prior to its 2005 expiration, an extension was negotiated and granted in 2004. The extension lapsed on 30 June 2012.

Even before current negotiations for a second extension until 2017, the country had twice been denied appeals for postponement of "special treatment's" expiration.

De Lima's letter was not made public as she said they would issue a more "definitive legal opinion" after considering "varying interpretations."

Stakeholders in the rice industry have been waiting for the legal opinion of the DOJ on the matter, which they said would serve as a guide for the courts in resolving petitions for injunction filed by rice importers.

Agriculture chief says ‘technical breach’ of WTO treaty is ok

Details Category: [Nation](#) 10 Mar 2014 Written by Joel San Juan



A “TECHNICAL breach” of an international treaty is okay if no foreign government complains.

This was the opinion of Agriculture Secretary Proceso J. Alcala, who a month after seeking the opinion of the Department of Justice (DOJ) on whether the National Food Authority (NFA) could continue to implement rice import quotas despite the June 2012 expiration of the special treatment on rice granted by the World Trade Organization (WTO), rejected the DOJ opinion provided by Justice Secretary Leila de Lima, who advised the Department of Agriculture to observe the lifting of rice import quotas when the WTO-issued special treatment on rice expired in June 2012.

Alcala took exception to the DOJ's recommendation that WTO provisions on the lifting of rice import quotas are “already effective and should be complied with,” and in a two-page memo to de Lima dated January 21, 2014, argued that since the negotiations for the extension of the quantitative restriction (QR) were allowed by the WTO beyond June 30, 2012, “even with the expiration of the extension period...the QR remains in place.”

Alcala's statement directly contradicted de Lima's assertion that the government gave its consent to the WTO Agreement aware that the extension of its authority to impose QR on agricultural products like rice “shall only be by agreement after the conduct of negotiations.”

De Lima said in her December 16, 2013, memo to Alcala that “since the Philippines's request for the extension of its QR on rice until 2017 is still pending, there is thus no existing agreement” to extend the NFA's authority to impose rice import quotas.

Negotiations for the extension of the QR will resume in April this year, with additional rounds in June and October. Talks are ongoing with four countries (Australia, Canada, Thailand, and the United States) that have withheld support for the extension of the QR until tariff concessions are given on agricultural goods such as beef, chicken, swine and turkey. An extension is unlikely to be secured if an agreement is not made by June.

PH seeks US support on continued rice protection

by Bernie Magkilat

March 30, 2014

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The Philippines has sought the US government's support in its bid for extension of the WTO Special Treatment (ST) on rice or quantitative restriction (QR) imposed on rice imports at the recently-concluded Trade and Investment Framework Agreement (TIFA) meeting wherein the US also recognized the considerable efforts the Philippines has done to address labor workers rights and improve intellectual property regime to improve economic relations.

In separate statements, the Philippines and the US Trade Representative (USTR) cited progress on issues of concern by both parties at the conclusion of the TIFA meeting held last March 19-20 in Washington D.C.

On bilateral issues, the United States recognized the considerable efforts the Philippines has made to strengthen its intellectual property regime and overall framework for protecting worker rights, two areas of focus of recent US-Philippines cooperation. The two sides agreed to establish a new work program on labor affairs under the TIFA to further our efforts. In addition, the United States and Philippines held detailed discussions of agricultural trade, including related to rice and meat, and these discussions will continue in the coming weeks.

Speaking as head of the Philippine delegation to the TIFA meeting, Trade and Industry Undersecretary Adrian S. Cristobal Jr. said the Philippines has taken significant steps on the issues on: Extra judicial killings and the adequate protection of workers' right to self-organize in relation to the Generalized System of Preferences-related country review of Philippine labor right.

"The Philippines looks forward to receiving the USTR's country review termination notice while still continuing to work on other deliverables. The Philippines also brought up the country's removal from the Intellectual Property watchlist," Cristobal said in a statement.

On agricultural trade issues, Cristobal said the Philippines is counting on the US' support for the extension of the special treatment on rice in time for the WTO-Council of Trade in Goods meeting on April 9 this year. The QR on rice already expired in 2012.

The Philippines' Department of Agriculture has already petitioned the WTO to extend the quantitative restriction on rice to further protect rice farmers from the influx of cheaper grains and ensure the government meets its target of rice-sufficiency by 2015.

Both parties also discussed market access protocols for the exports of bananas and mangoes to the US and the entry of US vegetables.

The Philippines asked the US to expand market access for mangoes via fast-tracking the issuance of pending regulation to allow importation into the Continental USA of Philippine mangoes from more provinces apart from Guimaras.

In 2005, the US requested for market access for celery, carrots, cabbage, cauliflower, and lettuce to the Philippines. After it was allowed to export carrots to the Philippines, the US is now asking for the Bureau of Plant Industry's issuance of the Administrative Circular to allow exports of cabbage, cauliflower, celery and lettuce. The US also brought up the use of reference prices for meat imports.

In response to Philippine interest in the Trans-Pacific Partnership (TPP) agreement, the United States briefed the Philippines on the goals and objectives that the twelve TPP countries are seeking to achieve. The two sides began a program of technical consultations to provide the Philippine government the detailed information it will need to consider whether to seek to join the TPP agreement.

The United States and Philippines also agreed to intensify cooperation on US-ASEAN issues and on the trade and investment agenda for APEC, which the Philippines will host in 2015.

The United States and the Philippines have had a close trade relationship for more than a century. The two sides meet regularly under the auspices of the TIFA, which is the coordinating mechanism for trade and investment policy discussions between our two governments. Total goods trade between the United States and the Philippines is about \$18 billion, up 41 percent since 2009. Services trade is growing rapidly and exceeded \$6 billion in 2012, also up 41 percent from 2009. US foreign direct investment in Philippines is roughly \$5 billion, concentrated in manufacturing.

The TIFA, signed in November 1989, is the primary bilateral mechanism for address trade and investment issues between the Philippines and the US.