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**Report Highlights:**

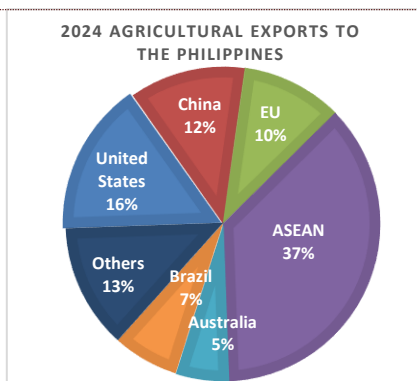
Consistently ranking as the top Southeast Asia destination for U.S. consumer-oriented agricultural products, the Philippines presents a resilient market for U.S. food and beverage products, supported by a young workforce with high disposable income, a growing middle-income consumer base, and remittances from overseas workers. With long-standing trade ties and a strong consumer trust on U.S. origin products, the Philippines provides export opportunities driven by strong demand for fruit and vegetable juices, beef and pork products, tree nuts, fresh vegetables and fruits, poultry meat and products, wine and related products, condiments and sauces, dairy products, and processed vegetables.

## MARKET FACT SHEET: PHILIPPINES MARKET OUTLOOK

The Philippine economy is poised to continue growing at 6 percent in 2025 (National Economic and Development Authority) with higher consumption as incomes rise with population growth. Amidst inflationary headwinds, the country's economy grew at 5.6 percent in 2024 with 26 percent growth in income from remittances. The service (6.7 percent) and industry (5.6 percent) sectors posted growths in 2024 while agriculture, forestry, and fishing (-1.6 percent) sectors declined.

### AG EXPORTS TO THE PHILIPPINES

The Philippines ranked as the eleventh largest U.S. agricultural and related products export market in 2024, reaching [\\$3.53 billion](#). The United States remains the largest single-country exporter to the Philippines.



Source: Trade Data Monitor and FAS

### FOOD PROCESSING SECTOR

Post estimates food sales growth at 5 percent in 2025 with sustained demand supported by easing inflation. Food and beverage manufacturers sales grew 5 percent and 11 percent respectively in 2024, despite inflationary pressures.

### RETAIL FOOD SECTOR

Post estimates retail sales growth at 7 percent in 2025 as the expansion of modern retail stores continues. Despite elevated retail prices, food and beverage retail sales grew 6 percent in 2024, a slower pace than in 2023.

### FOODSERVICE SECTOR

Post sees a robust foodservice sector growth of 12 percent as restaurant chains drive sales through an

increasing number of stores and restaurant concepts while maintaining online deliveries.

### Philippines: Quick Facts C.Y. 2025

#### Demographics

- 121 million population
- 1.5 percent population annual growth
- 47 percent under 24 years old & median age of 25 years old
- 48 percent urbanization rate
- 13 percent reside in Metro Manila (capital city)
- 80 percent speak English & 96 percent literacy rate

#### Gross Domestic Product (GDP)

- GDP: \$527 billion (est)
- GDP per capita: \$4,350 (est)
- GDP growth rate: 6% (est)
- GDP PPP: \$1.6 trillion (est)

#### Agricultural & Related Trade (2024)

- World Exports to PH: \$22.08 billion
- PH Exports to World: \$7.7 billion

#### Consumer-Oriented Agricultural Products:

- Pork, beef, poultry
- Dairy products
- Food preparations
- Sauces and condiments
- Fruits and vegetables
- Biscuits and baked products

#### Top Fast-Food Chains

[Jollibee](#), [Mc Donald's](#), [Chowking](#), [Shakey's](#), and [KFC](#)

#### Top Supermarkets

[SM](#), [Robinson's](#), [Puregold Price Club](#), [Metro](#), [Gaisano](#), and [Landmark](#)

#### Top Convenience Stores

[7-Eleven](#), [Alfamart](#), [Uncle John's](#), [All Day](#), and [Lawson](#)

#### Top Warehouse Clubs

[S&R](#) and [Landers](#)

Sources: [Euromonitor](#), [Global Agricultural Trade System](#), [International Monetary Fund](#), [The World Factbook](#), [U.S. Census Bureau](#), [Trade Data Monitor](#), [The Economist](#), [World Bank](#), [Philippine Statistics Office](#), [Department of Trade and Industry](#), [National Economic and Development Authority](#), [S&P Global-IHS Markit](#), and FAS Manila research

Strengths	Weaknesses
<ul style="list-style-type: none"><li>Strong preference for U.S. ingredients and perceived higher standard and quality.</li></ul>	<ul style="list-style-type: none"><li>Less competitive shipping costs and tariffs than ASEAN, China, and AU-NZ competitors.</li></ul>
Opportunities	Threats
<ul style="list-style-type: none"><li>A young, growing working-age population that has a strong affinity to American brands.</li></ul>	<ul style="list-style-type: none"><li>Higher agricultural exports from EU, ASEAN, and Brazil.</li></ul>

Contact: USDA-FAS Manila, U.S. Embassy, Philippines

E-mail: [AgManila@usda.gov](mailto:AgManila@usda.gov)

## SECTION I. MARKET OVERVIEW

### Population and key demographic trends

With a young workforce possessing high disposable income, a growing population of middle-income consumers, and remittances from immigrants and workers abroad, the Philippines offers a resilient market for U.S. food and beverage products.

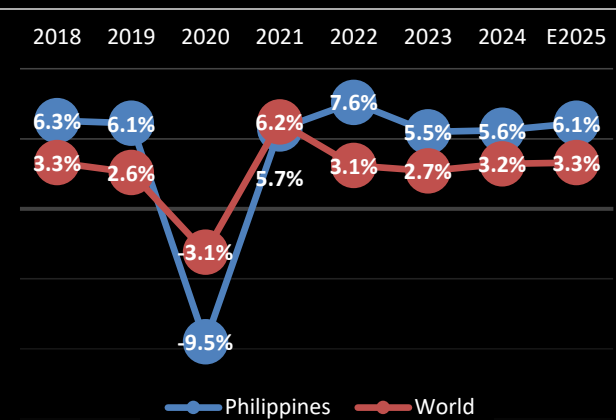
As higher-paying jobs rise, middle-class income grows, paving the way for sustained economic growth. 57 percent of the population is under the age of 30, and consumers aged 35 to 49 have annual earnings exceeding average family income of \$6,500 (Euromonitor). This consumer group increasingly spends on leisure, including travel and dining in restaurants. Household experience increased expenditure by 5 percent year-over-year in 2024, and represented 36 percent of household spending in the same year, signifying sustained spending on food and beverage. Food and beverage spending increased by 3 percent in CY2024 compared to the previous year, as inflation eased at 3 percent and 4 percent, respectively.

The service and industry sectors grew by 6.7 percent and 5.6 percent respectively in 2024, as more individuals relocated to cities or abroad for improved economic opportunities. Meanwhile the agriculture sector contracted by 1.6 percent in 2024 due to successive typhoons, and agricultural imports grew by 7 percent year-over-year.

### Size of economy and consumer behavior

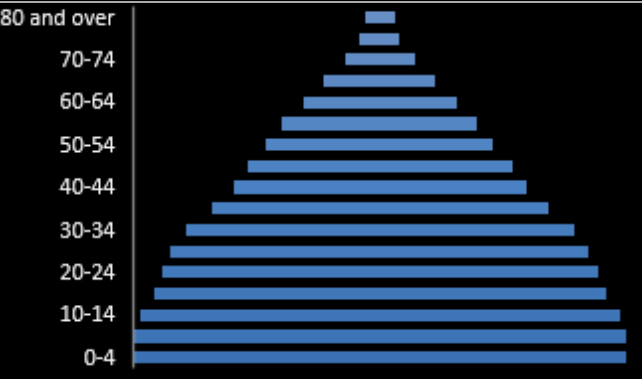
The Philippine economy is estimated to have the second highest growth rate in Southeast Asia at 5.5 percent in 2025, following Vietnam at 6.1 percent. Philippine growth rate will also outpace that of Southeast Asia, currently estimated at 4.1 percent during the same year (International Monetary Fund).

**Figure 1. Gross Domestic Product (in percentage growth rate)**



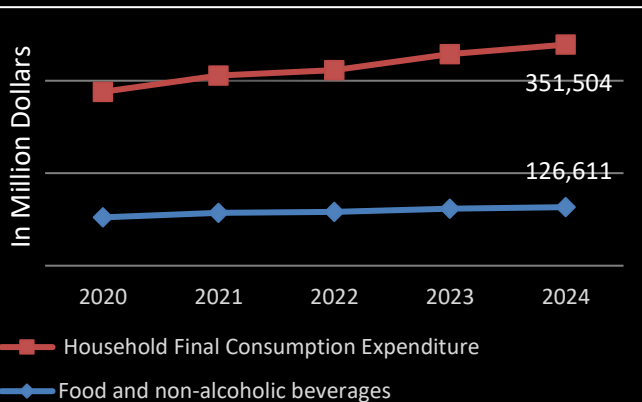
Source: [World Bank](#) and FAS Research

**Figure 2. 2025 Projected Population Pyramid**



Source: [United States Census Bureau](#)

**Figure 3. Household Final Consumption Expenditure, By Purpose (at current prices)**

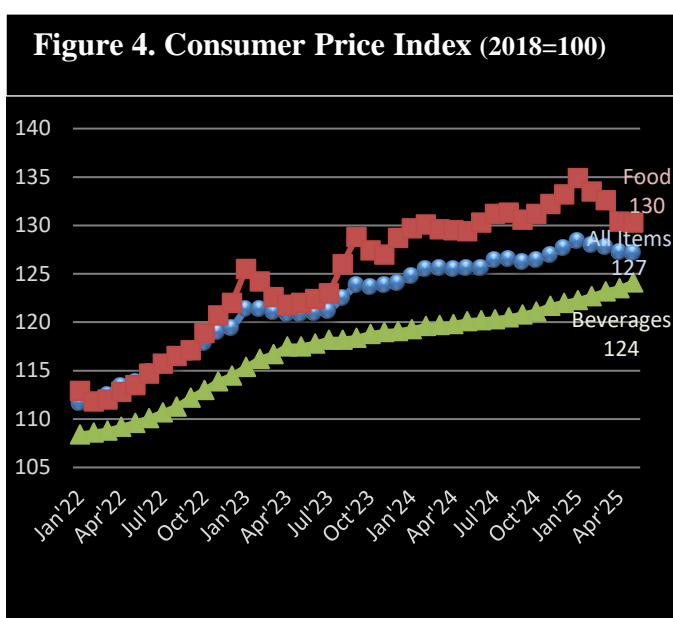


Source: [Philippine Statistics Authority](#)

As overseas workers remittances hit a record high of over \$38 billion in 2024 and employment rate reached a 20-year high, spending on food and beverage increased by 6 percent in 2024. Prices of food and other items started easing during the first quarter of 2025.

### Overall business climate

Driven by higher consumption, investments, and increased government spending, the Philippines' business climate provides opportunities for U.S. exports. The growth in the service and industry sectors were driven by robust full-year growth in construction (10.3 percent), financial and insurance activities (9 percent), professional and business services (7.9 percent), retail trade (5.6 percent) and the manufacturing sector (3.6 percent). An increase in government spending by 10 percent, especially in public infrastructures, contributed to further economic growth this year. Based on the import dependency ratio, the Philippines presents significant export opportunities for various products, including meat, seafood, potatoes, corn, and other agricultural commodities. These opportunities also support the country's food security.



ADVANTAGES	CHALLENGES
Importers are keen to introduce new products as Filipino consumers favor familiar U.S. brands known for quality and food safety, positioning the Philippines as a leading Southeast Asian market for U.S. consumer-oriented goods.	U.S. exporters face trade barriers such as higher tariffs (Most-Favored Nation) compared to Asian countries with preferential trade agreements.
Product quality and consistency are key factors for manufacturers and importers when making purchasing decisions.	U.S. exporters remain at a competitive disadvantage vis-à-vis Asia due to logistics and transportation lead time and cost. Logistical challenges in distributing products across an archipelagic country can also cause delays.
<a href="#">U.S. trade associations</a> , <a href="#">State Regional Trade Groups</a> , <a href="#">State Departments of Agriculture</a> , and <a href="#">USDA Foreign Agricultural Service</a> provide technical seminars, trade servicing, and buying missions to Philippine buyers.	Philippine retailers and importers have minimal volume orders, especially for new export products, and rely on U.S. consolidators for container load shipments. Some U.S. companies are not keen in exporting small quantities.
Premiumization and healthier trends provide opportunities for U.S. exporters.	Staggered oil price hike imposes potential rising costs on transportation, including shipping cost of imported products. This may result in thrifter spending on food and beverage products.

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## SECTION II. EXPORTER BUSINESS TIPS

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Here are some suggestions based on Post knowledge that U.S. exporters may find useful:

### Utilize U.S. Trade Support:

- ✓ Access the [Philippines Country Commercial Guide](#) for more information on the country's economic environment.
- ✓ Contact USDA-FAS Manila to help facilitate trade, provide market information, and promote U.S. products through marketing programs.
- ✓ USDA-FAS Manila collaborates with more than 70 [U.S. agricultural trade associations](#), [State and Regional Trade Groups](#), and [State Departments of Agriculture](#) to support capacity-building and training programs.
- ✓ Know the market and access annual and market brief reports at [USDA Manila](#).

### Contact Buyers:

- ✓ Connect with major importers, large manufacturers, or key processors with offices in Manila, Cebu, Davao and other major cities.
- ✓ Contact central purchasing offices of conglomerates, retail supermarket chains, restaurants chains and groups.
- ✓ Access sectoral reports in [USDA Manila](#) for top food processors, retailers, and restaurants.

### Establish Agreements:

- ✓ Secure an importer agreement to set expectations and delineate roles and responsibilities prior to shipment.
- ✓ Access [Incoterms](#) for shipment options and guidelines.

### Selecting Ports:

- ✓ Determine the nearest or preferred port of the buyer.
- ✓ Avoid shipping during the fourth quarter of the year due to congested ports.
- ✓ Manila Port receives 80 percent of agricultural exports to the Philippines and the rest are shipped to Cebu, Davao, Subic, Batangas, Cagayan de Oro, and other ports. Access the report [Connecting Port to Plate Amid Evolving Food Preferences](#) for details.
- ✓ Access the [Bureau of Customs](#) and [Philippine Ports Authority](#) for updates.

### Maintain Trade Support:

- ✓ Provide trade support such as trade incentives, technical servicing, marketing support, especially for new-to-market products.
- ✓ Provide support for e-commerce to increase online sales and brand awareness of export products. The Philippines regularly tops social media and internet usage global rankings.
- ✓ Build long-term relationships with importers and frequently visit the market.
- ✓ Participate in U.S. agricultural trade organizations and USDA-Manila-led activities and events.

### Exhibitions:

- ✓ Participate in key trade exhibitions to promote and sell U.S. products.
- ✓ Access sectoral reports in [USDA Manila](#) for key trade events in retail food, food processing ingredients, and food service.

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### SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

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New-to-market exporters should contact FAS Manila and U.S. agricultural trade organizations for market information and assistance. Exporters transact with agents, distributors, importers or meet buyers of manufacturers, retail stores, and restaurant chains to facilitate large export volumes. Access the following reports for information on the import procedures:

- [Philippines: Food and Agricultural Import Regulations and Standards Country Report](#)
- [Philippines: Food and Agricultural Import Regulations and Standards Export Certificate Report](#)
- [Philippines Country Commercial Guide](#)

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### SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

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#### **FOOD PROCESSING**

The manufacturing sector experienced a 3.6 percent year-over-year (YOY) growth in 2024 driven by sustained demand. FAS Manila estimates the food and beverage manufacturing sector reaching 5 percent growth in 2025 with export opportunities for soybean meal and soy products, wheat products, powdered milk, buttermilk, pork offal, chipping potatoes, starches, tomato sauce, food preparations, processed fruits and vegetables, dextrins, peptones, proteins, tree nuts, and pulses. Manufacturers actively develop new products and rely on U.S. ingredients for quality and consistency.

Although inflationary pressures started easing, the industry continues to face elevated production costs, including raw materials and electricity. Some manufacturers look for alternative sources abroad to maintain supply and reduce ingredient costs. See the [Food Processing Ingredients](#) report for details.

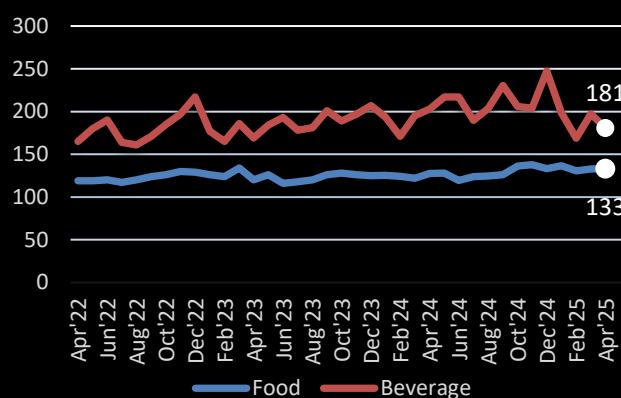
#### **Market Opportunities**

- Buyers prefer U.S. ingredients due to reliable performance and high-quality standards.
- Exporters may introduce new products and flavors as well as exploring healthy and nutritious food options.
- Manufacturers rely on U.S. companies for trainings and trade servicing to increase production efficiency and improve product quality.

#### **Key Issues**

- U.S. shipments have longer lead times compared to Asian countries.
- Buyers look for other suppliers, substitute with other ingredients, or decrease volume of orders as a cost cutting measure.

**Figure 5. Food and Beverage Manufacturing Sector Value of Net sales Index (2018=100)**



Source: [Philippine Statistics Authority](#)



## **FOOD RETAIL**

FAS Manila estimates a 7 percent growth in food retail sales, driven by robust demand and the continued expansion of modern retail outlets. Although retail store prices remain elevated, food and beverage are prioritized as part of essential needs. Retailers are expanding into rural areas and introducing new food and beverage options to meet the demand of discerning consumers, thereby boosting sales in the sector. Some retailers feature promotions of imported products to attract consumers while others offer private label products to deliver value for money to price-sensitive consumers. Retail chains of supermarkets, hypermarkets, convenience stores, and warehouse clubs continue expansion in key cities and rural areas further contributing to food retail sales growth.

Food retail sector provide export opportunities for fruit & vegetable juices, tree nuts, beef, pork and poultry cuts, milk, butter, cheddar, mozzarella, cream cheese, ice cream, soy milk, chewing gum & candy, chocolate, tomato sauces, sausages, hotdogs, luncheon meat, meatloaf, pasta, seasoning, tomato ketchup, raisins, peas, beans, kidney beans, garlic, onions, potatoes, mushroom, cereals, bakery goods, frozen fruits and vegetables, beverages, and pet food. See the latest [Retail Foods](#) report for details.

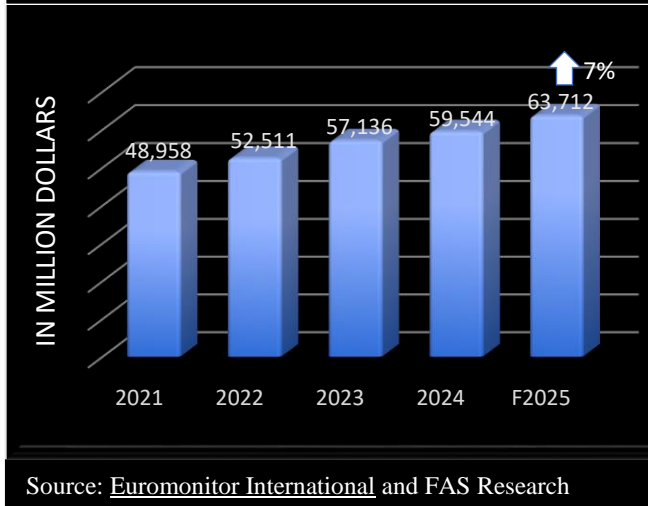
## **Market Opportunities**

- Popular U.S. brands of food and beverages sold in warehouse clubs and supermarkets have high brand recognition and higher sales compared to their competitors (i.e., snacks, chocolates, canned meat, juices, and other products).
- U.S. frozen beef, pork and poultry as well as fresh fruits and vegetables are preferred by consumers for their quality.
- Retail stores sell industrial packages of ingredients used in restaurants, hotels, and catering such as dairy products, condiments, sauces, seasonings, and juices.
- Retail stores retain imported sections and feature U.S. products during American Independence Day and Christmas.

## **Key Issues**

- Most retailers don't import directly and buy from importers or consolidators.
- Retail chains continue to charge high retailer fees to carry new products or feature products in promotions.
- Some U.S. products and unknown brands sold in rural areas may have difficulty selling in stores.

**Figure 6. Food and Beverage Retail Sales**



## **FOOD SERVICE**

FAS Manila sees the sector's prosperity driven by consumer dining, event bookings, and tourist influx to hotels, boosting sales by 12 percent. Consumers spending increased by 15 percent in restaurants and hotels from 2023-2024 ([Philippine Statistics Authority](#)) as tourism flourishes.

Restaurant and kiosk franchises continue to open more stores in key cities and rural areas to surpass last year's sales figures.

While many hotels and restaurants are featuring imported premium ingredients, some restaurant chains, including quick service restaurants, explore direct importation for stable ingredient supply. Many people regularly visit quick service restaurants due to their affordability and convenience.

Restaurant chains present volume orders for chicken leg quarters, mozzarella, and other imported ingredients used to serve fried chicken, pizza, and burgers. Meanwhile, coffee shops and street kiosks offer opportunities for bakery products, potato fries, processed meat, fruit beverages, and roasted coffee and bean extracts. As more consumers drink distilled spirits and wines at bars and fine dining restaurants, others resort to online deliveries for gatherings at home. Mobile food delivery applications such as Grab and Food Panda continue to provide convenience and augment sales.

Restaurant groups with more than 200 stores nationwide provide volume orders such as [The Bistro Group](#), [Moment Group of Restaurants](#), [Jollibee Foods Corp.](#), [Max's Group Inc.](#), [Shakey's International Inc.](#), and [Yum! Brands Inc.](#) For further information, access the [Food Service- Hotel Restaurant Institutional](#) report.

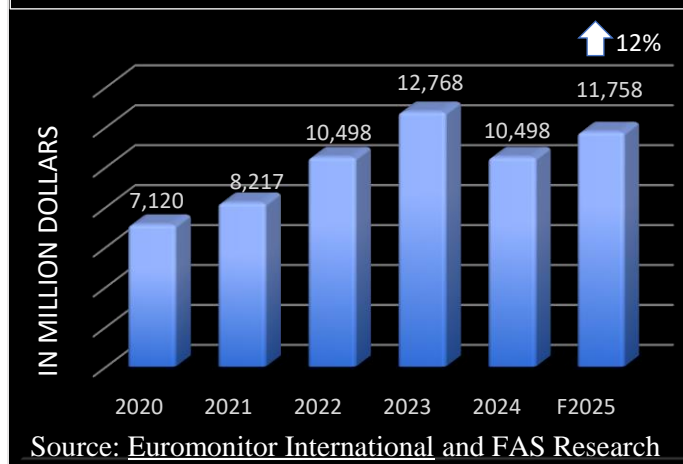
### **Market Opportunities**

- Chicken leg quarters for quick-service restaurants and mozzarella for pizza restaurants offer large export volumes.
- Opening of new hotels, increased occupancy in hotels rooms, and more event bookings provide volume orders of export products for dining and catering services.
- High-end restaurants and hotels highlight U.S. ingredients on the menu (i.e., ribeye, porterhouse, tenderloin, Kurobuta pork, duck, cheese, and wines).
- Warehouse clubs, supermarkets, and convenience stores open food service dining area to provide food menus for consumers.

### **Key Issues**

- Some small-volume restaurants work with importers for sourcing or purchase from retail stores with industrial packages.

**Figure 7. Consumer Food Service Sales**





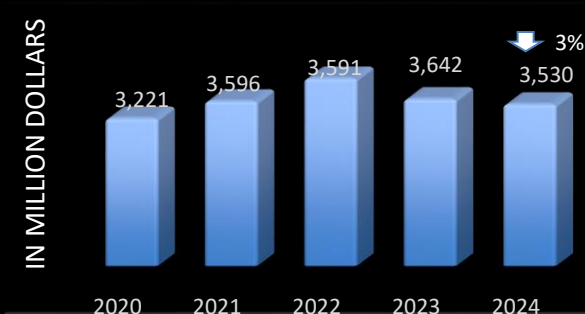
## SECTION V. AGRICULTURAL AND FOOD IMPORTS

The Philippines remains one of the top destinations for U.S. agricultural exports in the world: intermediate (top 5), consumer-oriented (top 9), and bulk (top 13). Total U.S. agricultural and related exports to the Philippines declined by 3 percent in 2024, primarily due to price reductions in soybean meal and wheat.

The top U.S. agricultural exports to the Philippines in 2024 were soybean meal (\$1,272 million), wheat (\$736 million), dairy products (\$365 million), poultry (\$194 million), ethanol (\$147 million), beef (\$132 million), pork (\$121 million), and processed vegetables (\$119 million).

Access the [U.S. Agricultural & Related Exports to the Philippines 2020-2024 and January-April YTD 2025](#) for other products.

**Figure 9. U.S. Agricultural and Related Exports to the Philippines**



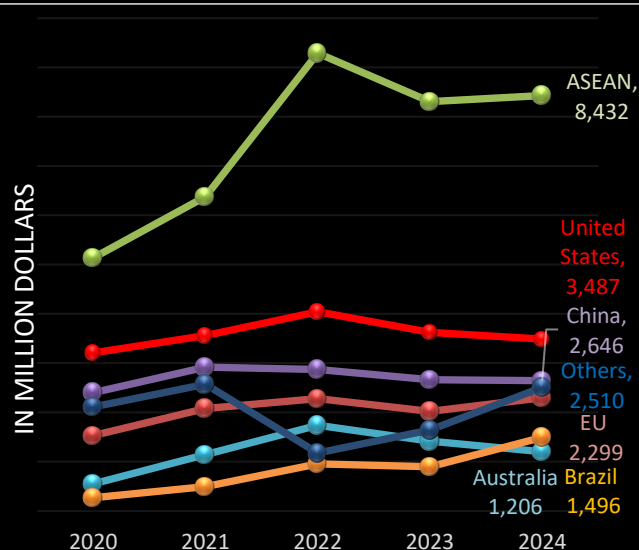
Source: [Global Agricultural Trade System](#)

**Figure 10. Ranking of U.S. Consumer-oriented Exports to the Philippines**

PRODUCT	RANK 1	RANK 2	RANK 3	RANK 4
Fruit and Vegetable Juices, Meat Products, and Tree Nuts	✓			
Fresh Vegetables, Poultry Meat and Products, and Wine & Related Products		✓		
Beef and Beef Products, Condiments & Sauces, Dairy Products, and Processed Fruit			✓	
Chewing Gum and Candy, Dog and Cat Food, Fresh Fruit, Pork & Prok Products, Processed Vegetables, and Pulses				✓

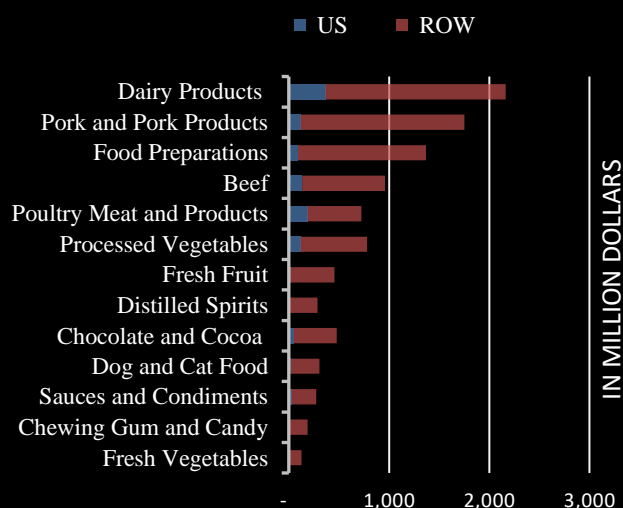
Source: [Trade Data Monitor](#)

**Figure 8. Agricultural Exports to the Philippines**



Source: [Trade Data Monitor](#)

**Figure 11. 2024 Top Consumer-oriented Agricultural Exports to the Philippines**



Source: [Trade Data Monitor](#)

## SECTION VI. KEY CONTACTS AND EVENTS

USDA-FAS Manila is ready to assist U.S. exporters in facilitating and promoting trade in the Philippines. See the contact details below of USDA Manila and other key contacts and events:

KEY CONTACTS		
<a href="mailto:AgManila@usda.gov">USDA Manila AgManila@usda.gov</a> Tel: (632) 5301-2000	<a href="mailto:IS.Manila.Philippines@usda.gov">USDA APHIS Manila IS.Manila.Philippines@usda.gov</a> Tel: (632) 5301-2000	<a href="mailto:businessphilippines@trade.gov">Foreign Commercial Service businessphilippines@trade.gov</a> Tel: (632) 5301-4249
<a href="#">Department of Trade and Industry (DTI)</a>	<a href="#">Department of Agriculture</a>	<a href="#">Food and Drug Administration</a>
<a href="#">Tradeline Philippines</a>	<a href="#">Philippine Chamber of Commerce (PCCI)</a>	<a href="#">American Chamber of Commerce of the Philippines (AMCHAM)</a>
<a href="#">Anti-Red Tape Authority</a>	<a href="#">Philippine Exporters Confederation, Inc. (PHILEXPORT)</a>	<a href="#">Philippine Food Processors and Exporters Organization Inc.</a>
<a href="#">Center for International Trade Expositions and Missions (CITEM)</a>	<a href="#">Philippine Chamber of Food Manufacturers Inc. (PCFMI)</a>	<a href="#">Association of Purchasing Managers of Hotels and Restaurants of the Philippines</a>
<a href="#">Hotel and Restaurant Association of the Philippines</a>	<a href="#">Food Caterers Association of the Philippines (FCAP)</a>	<a href="#">Philippine Retailers Association (PRA)</a>
<a href="#">Filipino-Chinese Bakery Association, Inc.</a>		
EVENTS		
<a href="#">FOODEX Japan*</a> Tokyo Big Sight, Japan March 10-13, 2026	<a href="#">Food and Hotel Asia*</a> Singapore Expo, Singapore April 21-24, 2026	<a href="#">Seoul Food and Hotel*</a> KINTEX, Seoul, Korea June 10-13, 2025
<a href="#">Manila Food and Beverage Expo</a> World Trade Center, Manila June 11-15, 2025	<a href="#">World Food Expo</a> SMX Convention Center, Manila August 6-9, 2025	<a href="#">Food Ingredients Asia*</a> Jakarta International Expo, Jakarta, Indonesia September 16-18, 2026

\*USDA Endorsed Trade Show

**Attachments:**

No Attachments