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Report Highlights:

Global exports of fresh fruit to the Philippines increased by 3 percent year-over-year, reaching \$321 million in 2024, and are projected to grow by 25 percent in 2025. In contrast, U.S. exports declined by 10 percent year-over-year to \$14 million in 2024 and are expected to decrease by at least 7 percent in 2025. Despite the overall forecasted decline, traders anticipate growth in U.S. apple exports in 2025, driven by the promotion of new varieties. The United States is widely recognized for consistently supplying premium-quality fruit, and U.S. exporters are encouraged to leverage this reputation through strong U.S. branding and the introduction of innovative fresh fruit varieties to the Philippine market.

Overview of the Philippine Market

The Philippine market presents significant opportunities for U.S. fresh fruit exports. This report highlights key growth drivers, production and trade trends, and the performance of U.S. exports in the market. It also provides essential information on regulatory requirements, allowable U.S. fresh fruit, and tariff and tax policies to assist exporters in navigating the Philippine market effectively.

Scope

This report focuses on U.S. fresh fruit exports under the USDA Foreign Agricultural Service (FAS) BICO-Fresh Fruit classification. The full list is provided in Annex A, Table A1: USDA FAS GATS BICO-Fresh Fruit Commodity Aggregation Definitions. Information on other classifications, such as BICO-Processed Fruit, is not included in this report. For more information on BICO classifications, visit the [FAS website](#).

Philippine Market Opportunities and Growth Drivers

The Philippines is both a familiar and promising market for many U.S. exporters. A shared history has fostered deep societal ties between Filipinos and Americans, reflected in mutual passion for sports, music, and food. American products enjoy exceptionally high brand recognition and positive perceptions among Filipino consumers. Despite this, U.S. exports have only begun to tap into the vast potential of the Philippine market.

The overall demand for imported agricultural and related products is driven by a young and growing population, rising incomes, and the Philippines' reliance on imports to meet domestic food needs. The population of the Philippines is estimated at 120 million in 2025, with an annual growth rate of 1.53 percent. The population is expected to reach 164 million by 2055, with more than 1 million people added each year, further driving increased demand for food and agricultural products. Demographic data shows that 31 percent of the population is under 15 years of age (young dependents), 64 percent is aged 15 to 64 years (working age or economically active population), and only 5 percent is 65 years and older (old dependents). This structure, characterized by a large working-age population, is expected to fuel consumer spending and sustain economic growth for years to come. All data in this section is sourced from the [U.S. Census Bureau](#).

According to the [World Bank](#), the Philippines is on track to transition from lower-middle to upper-middle-income status by 2026. Additionally, data from the [Philippine Statistics Authority](#) (PSA) indicates that imports account for a quarter of the nation's food supply. These factors collectively present strong opportunities for U.S. exporters to meet the growing demand for agricultural and related products.

Trends in Local Production and Trade

Based on [PSA](#) data, production of the Philippines' major fruit crops, specifically bananas, calamansi, mangoes, and pineapples, has slowly declined over the past decade at a Compound Annual Growth Rate (CAGR) of -0.20 percent, averaging 12.7 million metric tons (MT) annually.

During the same period, Philippine fresh fruit exports, including all of its major fruit crops, grew at a CAGR of 3.6 percent, while imports expanded at a CAGR of 7 percent, with year-over-year growth of 3 percent, reaching \$321 million in 2024, based on data compiled by Trade Data Monitor.

Suppliers of Fresh Fruit to the Philippines

In 2024, the Philippines imported fresh fruit from five key suppliers: China, South Africa, Australia, the United States, and Thailand. According to traders, the United States is known for consistently supplying premium quality fruit with a relatively longer shelf life. With the exception of South Africa, the dominance of regional suppliers is driven by better prices, largely resulting from lower shipping costs and zero tariff advantages under free trade agreements with ASEAN, of which the Philippines is a member-country. South Africa has established itself as a Sectoral Dialogue Partner with ASEAN, which fosters economic collaboration. See **Table 1** for a detailed breakdown of market shares and products by country.

Table 1. Top Fresh Fruit Exports to the Philippines in 2024

Country	Share of Total Exports	Products
China	72%	Apples, grapes, mandarins, pears, lemons and limes, oranges, and other citrus hybrids
South Africa	9%	Mandarins, apples, avocados, grapes, lemons and limes, pears, oranges, and plums
Australia	8%	Grapes, mandarins, oranges
United States	3%	Apples, cherries, grapes, oranges, strawberries, cranberries and blueberries, and peaches
Thailand	1%	Tamarind and langsat

Note. Data from exporting countries compiled by Trade Data Monitor. Category: BICO-Fresh Fruit.

Fresh fruit shipments to the Philippines have shown strong growth in 2025, increasing by 20 percent through August. Traders forecast at least a 25-percent increase for the full year compared to 2024.

U.S. Fresh Fruit Exports to the Philippines

Over the past decade, U.S. fresh fruit exports to the Philippines declined by 73 percent, falling to less than \$14 million in 2024. Exports of apples, grapes, oranges, and plums experienced significant decreases, while sweet cherries, strawberries, nectarines and peaches, and blueberries and cranberries showed remarkable growth.

Despite the overall forecasted decline of U.S. fresh fruit exports to the Philippines by seven percent in 2025, traders anticipate growth in U.S. apple exports. This increase is expected to be driven by the popularity of the Ambrosia, Cosmic Crisp, and SugarBee varieties, which were introduced in 2024 and have gained traction among Philippine consumers. U.S. exporters are encouraged to leverage this momentum and continue introducing innovative fruit varieties to the market.

Table 2 provides detailed data on U.S. fresh fruit exports to the Philippines in 2015 and 2024.

Table 2. U.S. Fresh Fruit Exports to the Philippines in 2015 and 2024 (Values in \$'000)

Fruit	2015	2024	%Δ 2025/2024
Apples	8,090	5,675	-30%
Cherry, other than sour	454	2,353	418%
Grapes	32,874	2,236	-93%
Oranges	6,209	2,063	-67%
Strawberries	110	740	575%
Nectarines and Peaches	119	217	82%
Blueberries and Cranberries	118	415	252%
Plums	68	59	-13%
Total	51,040	13,780	-73%

Note. Data from USDA Foreign Agricultural Service's Global Agricultural Trade System (GATS). Category: BICO-Fresh Fruit.

Regulatory Overview

This regulatory overview provides information on allowable fresh fruit imports and general import regulations. **Disclaimer:** It is not a comprehensive guide, and regulations are subject to change. Exporters are advised to verify requirements with their importers before shipping goods.

Import Requirements

Importers must obtain accreditation from the Bureau of Plant Industry (BPI) under the Philippine Department of Agriculture (DA). Prior to each importation, importers must apply for a Sanitary and Phytosanitary Import Clearance (SPSIC). The SPSIC is non-transferable and specific to individual shipments; it cannot be used to facilitate multiple shipments. According to [DA Administrative Circular 6-2022](#), the “Must Ship Out by Date” for fresh fruit is 20 days from the issuance of the SPSIC. Products should be loaded onto the vessel at the port of embarkation on or before the last day of the “Must Ship Out by Date.” For more information, refer to the GAIN report [Philippines: FAIRS Country Report Annual](#).

All U.S. fresh fruit entering the Philippines must be accompanied by a phytosanitary certificate issued by the USDA Animal and Plant Health Inspection Service. For more information, refer to the GAIN report [Philippines: FAIRS Export Certificate Report Annual](#). Importers must file an Application for Inspection at least 24 hours prior to the arrival of the shipment. Step-by-step procedures for importing fresh fruit, including inspection requirements, are available on the [BPI National Plant Quarantine Services Division \(NPQSD\) website](#).

List of Allowable Imported Fresh Fruit

BPI-NPQSD maintains an online [list of allowable imported fresh fruit](#). **Table 3** (see next page) summarizes the U.S. fresh fruit approved for import into the Philippines as of October 2025. U.S. suppliers interested in exporting U.S. fresh fruit not included on the list are encouraged to contact USDA-FAS Manila.

Table 3. Fresh Fruit Allowable for Import from the United States

Apples	Cherries	Kiwifruit	Oranges	Persimmons
Apricots	Grapefruits	Lemons	Peaches	Plums
Blueberry	Grapes	Nectarines	Pears	Strawberries

Tariff Rates

This section examines the tariff rates applied to Philippine imports of fresh fruit from the United States and its primary competitors in the market: Australia, China, South Africa, and Thailand.

The Philippines applies Most-Favored-Nation (MFN) tariff rates to imports from most countries unless a preferential trade agreement is in place. As a member of the Association of Southeast Asian Nations (ASEAN), the Philippines participates in the ASEAN Trade in Goods Agreement (ATIGA), which provides preferential tariff rates for trade among ASEAN member states, including Thailand.

In addition to ATIGA, ASEAN has external trade agreements that provide preferential tariff rates with key trade partners. These include the ASEAN-China Free Trade Area (ACFTA) and the ASEAN-Australia-New Zealand Free Trade Area (AANZFTA).

The Philippines does not have a preferential trade agreement with the United States or South Africa. As a result, MFN tariff rates apply to fresh fruit imports from both countries.

Table 4 outlines the MFN tariff rates for allowable imported fresh fruit from the United States.

Table 4. Allowable Imported Fresh Fruit from the United States and the MFN Tariff Rates

Fresh Fruit	MFN Tariff Rate
Apples, Apricots, Blueberries, Cherries, Grapefruits, Grapes, Kiwifruit, Nectarines, Peaches, Pears, Plums	7%
Lemons, Oranges, Persimmons	10%
Strawberries	15%

Note. Tariff rates can be accessed online through the [Philippine Tariff Commission's website](#).

Value Added Tax

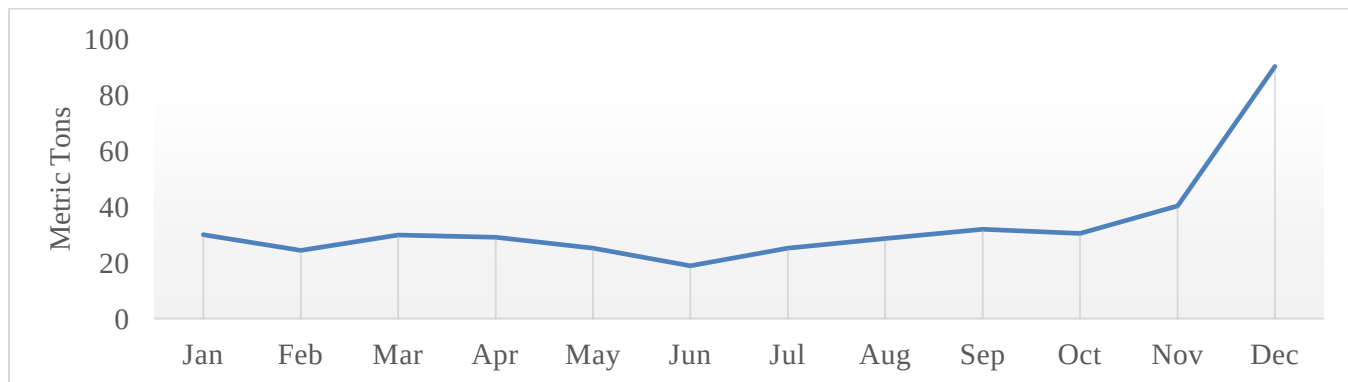
All fresh fruit is exempt from the 12 percent value-added tax (VAT). For additional details, refer to the GAIN report [Philippines: All Imported Fresh Fruits and Vegetables Now VAT Free](#).

Market Trends and Consumer Preferences

- The Philippines grows a wide variety of fruits. Only bananas and papayas are harvested year-round, while the rest are seasonal. This presents an opportunity for U.S. exporters to fill gaps in the market throughout the year. See **Annex B, Table B1: Philippine Fresh Fruit Seasons** for an overview of local fruit harvest periods and the number of fruits in season each month.
- **Figure 1** highlights the peaks and troughs in the monthly volume of Philippine imports of fresh fruit in 2024. Demand surged during the holiday season, driven primarily by the mandatory “13th-Month Pay,” a legal requirement for employers to provide bonus compensation equivalent to one month's basic salary annually. Employers typically release this payment as early as the

first week of November, providing consumers with more disposable income. In response, importers brought in more fruits beginning in October. Round fruits are especially popular during the holiday season, as traditions like eating 12 grapes and displaying 12 round fruits on the table are believed to bring prosperity for the 12 months of the coming year. Conversely, a trough in demand for imported fresh fruits occurred in June, when the largest number of local fruits were in season, as illustrated in **Annex B, Table B1**.

Figure 1. Monthly Volume of Philippine Imports of Fresh Fruit in 2024



Note. Source: PSA data compiled by Trade Data Monitor. Category: BICO-Fresh Fruit.

- Other than in supermarkets, fresh fruits are sold in wet markets and pop-up weekend markets in upscale residential areas that feature organic, gourmet, and specialty products. Wet markets remain popular for their lower prices on fresh produce, despite limited cold chain infrastructure, with most products stored at ambient temperature. Meanwhile, q-commerce, or quick commerce, has emerged as a key driver of fresh fruit sales by offering rapid deliveries, typically within an hour. This trend has prompted a growing number of fresh fruit traders to move online and partner with delivery service providers to meet increasing consumer demand for fast and convenient grocery options.
- Consumers are eager to try new-to-market fruit varieties and share their experiences on social media. In the past, Northwest Cherries capitalized on this excitement by promoting 15 cherry varieties in a single season. This initiative featured three of the country's influential chefs.
- Health and nutrition remain key drivers of fresh fruit consumption. Findings from the [National Health Promotion and Literacy Longitudinal Study](#), conducted by the Department of Health, revealed that 98 percent of Filipino adults are aware that eating fruits and vegetables lowers the risk of diseases, with 65 percent specifically mentioning "both fruits and vegetables."
- Apples, citrus fruits, and grapes are staples for "get-well-soon" gifts for loved ones.

Market Entry Strategies

- U.S. businesses must choose an entry strategy that aligns with their objectives and operational capacity. The two primary approaches are:
 - **Indirect Exporting:** This strategy involves working with a U.S.-based trading company to manage sales and logistics. It reduces the need for direct engagement in the Philippine market, making it an ideal option for businesses seeking a low-risk entry point.

- **Direct Exporting:** This approach involves collaborating with importers in the Philippines. These importers typically distribute fresh fruits through wholesalers who, in turn, supply wet market vendors, supermarket chains, hotels, and other institutional accounts, such as airline catering services. Restaurants and event caterers typically purchase from supermarkets and wet markets due to their smaller volume requirements. Additionally, some supermarket chains have started importing fresh fruits directly, bypassing traditional intermediaries.
- It is recommended to work closely with local importers and supermarket chains in developing marketing campaigns. Emphasize unique selling points, such as quality, flavor, fruit varieties, nutritional value, and certifications. Provide marketing assets, including training materials, promotional videos, high-resolution photos, brochures, recipes, and other resources to support these initiatives. Merchandising, product sampling, technical seminars, culinary demonstrations, social media campaigns, and public relations efforts are tactics to effectively engage consumers and boost market presence.
- For long-term growth, sustain brand-building efforts. Schedule regular visits to strengthen relationships with local stakeholders. Explore new channels, such as direct sales to large hotels and institutional accounts. For detailed insights into distribution channels, refer to the GAIN report [Philippines: Connecting Port to Plate amid Evolving Food Preferences](#).

Further Information

USDA-FAS Manila utilizes USDA's [Global Agriculture Information Network](#) (GAIN) system to provide stakeholders with insights into the Philippine market for U.S. agricultural and related products. Below are some of the available reports:

- [Philippines: Exporter Guide](#)
- [Philippines: Food and Agricultural Import Regulations and Standards \(FAIRS\) Report](#)
- [Philippines: Food Processing Ingredients](#)
- [Philippines: Food Service - Hotel Restaurant Institutional](#)
- [Philippines: Retail Foods](#)

For additional information on the Philippine market, contact the USDA Foreign Agricultural Service, U.S. Embassy in Manila, by phone at +632 5301-2000 or email AgManila@usda.gov.

Attachments:

No Attachments.

Annex A

Table A1. GATS BICO-Fresh Fruit Commodity Aggregation Definitions

HS Code	Commodity Description
80300	Bananas & Plantains, Fr/Dr
80310	Plantains, Fr/Dr
80390	Bananas, Fr/Dr
80430	Pineapples, Fr/Dr
80440	Avocados, Fr/Dr
80450	Guavas & Mangoes, Fr/Dr
80510	Oranges, Fr/Dr
80520	Mandarins and other Citrus Hybrids, Fr/Dr
80521	Mandarins, incl. Tangerines & Satsumas, Fr/Dr
80522	Clementines, Fr/Dr
80529	Wilkings and similar Citrus Hybrids, Fr/Dr
80530	Lemons & Limes, Fr/Dr
80540	Grapefruit & Pomelos, Fr/Dr
80550	Lemons & Limes, Fr/Dr
80590	Citrus NESOI, incl. Kumquats, Fr/Dr
80610	Grapes, Fresh
80710	Melons, Fresh
80711	Watermelons, Fresh
80719	Melons, ex. Watermelons, Fresh
80720	Papayas (Papaws), Fresh
80810	Apples, Fresh
80820	Pears & Quinces, Fresh
80830	Pears, Fresh
80840	Quinces, Fresh
80910	Apricots, Fresh
80920	Cherries, Fresh
80921	Sour Cherries, Fresh
80929	Cherries, ex. Sour Cherries, Fresh
80930	Peaches, incl. Nectarines, Fresh
80940	Plums, Prune Plums & Sloes, Fresh
81010	Strawberries, Fresh
81020	Raspberries, Blackberries & similar, Fresh
81030	Currants & Gooseberries, Fresh
81040	Cranberries, Blueberries & similar, Fresh
81050	Kiwifruit, Fresh
81060	Durians, Fresh

HS Code	Commodity Description
81070	Persimmons, Fresh
81070	Persimmons, Fresh
81090	Fruit Not Elsewhere Specified Or Included/Indicated (NESOI), Fresh

Note. List retrieved from the USDA FAS Global Agricultural Trade System (GATS) [website](#).

Annex B

Table B1. Philippine Fresh Fruit Seasons

Crops		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Major Fruit Crops													
1	Banana												
2	Lime/Calamansi												
3	Mango												
4	Pineapple												
Other Fruit Crops													
1	Avocado												
2	Breadfruit/Rimas												
3	Durian												
4	Granatis/Balimbing												
5	Guava												
6	Jackfruit												
7	Java Plum/Duhat												
8	Lanzones												
9	Lime/Dayap												
10	Mandarin												
11	Mangosteen												
12	Marang												
13	Melon												
14	Orange												
15	Papaya												
16	Pummelo/Suha												
17	Rambutan												
18	Santol												
19	Sapodilla/Chico												
20	Sineguelas												
21	Soursop/Guyabano												
22	Star Apple/Caimito												
23	Sweetsop/Atis												
24	Tamarind												
25	Velvet Apple/Mabolo												
26	Watermelon												
Number of Fresh Fruits in Season		7	5	8	12	17	20	17	15	14	13	14	14

Note. Source: [PSA Crops Production Survey Manual of Operations \(Appendix J\)](#) and FAS interview with traders.