

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## **Philippines**

### **Food Service - Hotel Restaurant Institutional**

#### **HRI Sectoral Report**

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**Report Highlights:**

The food service industry in the Philippines continues to expand as more and more shopping malls and new hotels are being opened throughout the country. The influx of foreign-branded restaurants coupled with the growing affluence of Filipino consumers has also contributed to the growth of the HRI sector. This growth in the foodservice industry provides greater opportunities for exports of U.S. food and beverage products to the Philippines.

**Post:**  
Manila

### I. Overview of the Philippine Market

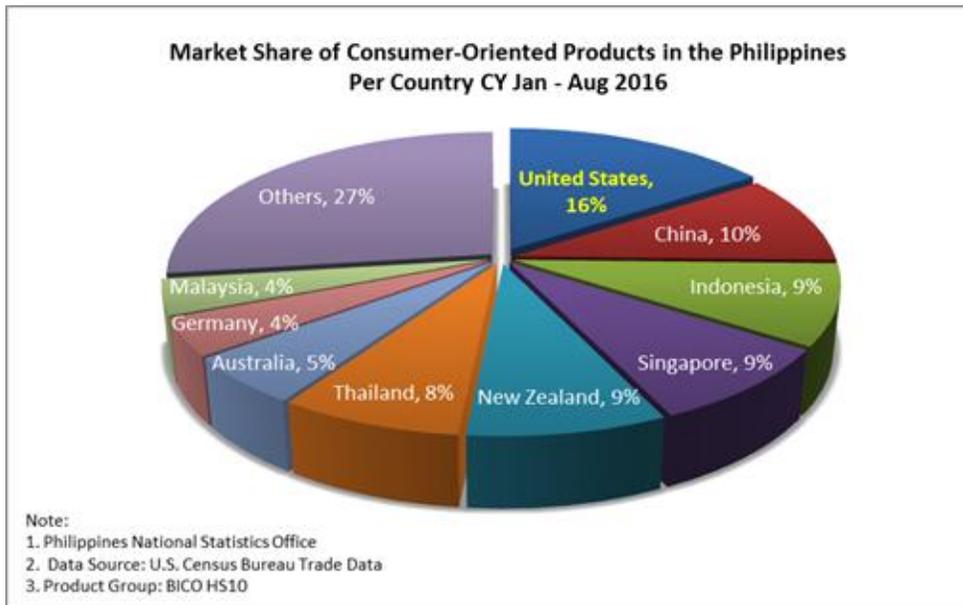
The Philippines is still the largest market in Southeast Asia for U.S. consumer-oriented food and beverage (F&B) products and one of the fastest growing markets in the world, importing \$898.4 million in U.S. F&B products in 2015.

A mature market with growing demand for U.S. consumer-oriented products, the United States remains the Philippines' largest supplier for food, beverage and ingredient products.

Ranked as the 13th largest export market for U.S. high-value, consumer-oriented products, the Philippines imported \$569.8 million from January through August 2016. Based on the chart below, the United States remains the largest supplier with seventeen percent (16%) market share, followed by China (10%), and Indonesia, Singapore, and New Zealand (9%). Total imports of consumer-oriented food grew annually by an average of 15%.

Table 1 – Philippine Market Profile	
<b>Population:</b>	
•	102.5 Million (July 2016 est.)
	Annual growth rate of 1.59%
•	19.17% below 24 years old
•	52% living in urban areas
<b>Land Area:</b> 298,170 sq. km.	
<b>2015 GDP Growth:</b> 5.8%	

### Chart 1 – Philippine Imports of Consumer-Oriented Products



The Philippines has a strong preference for U.S. brands and is always looking for new American products to taste and enjoy. As incomes grow, more American brands are likely to find a market

here.

Post expects demand for U.S. consumer-oriented products will continue to grow for following reasons:

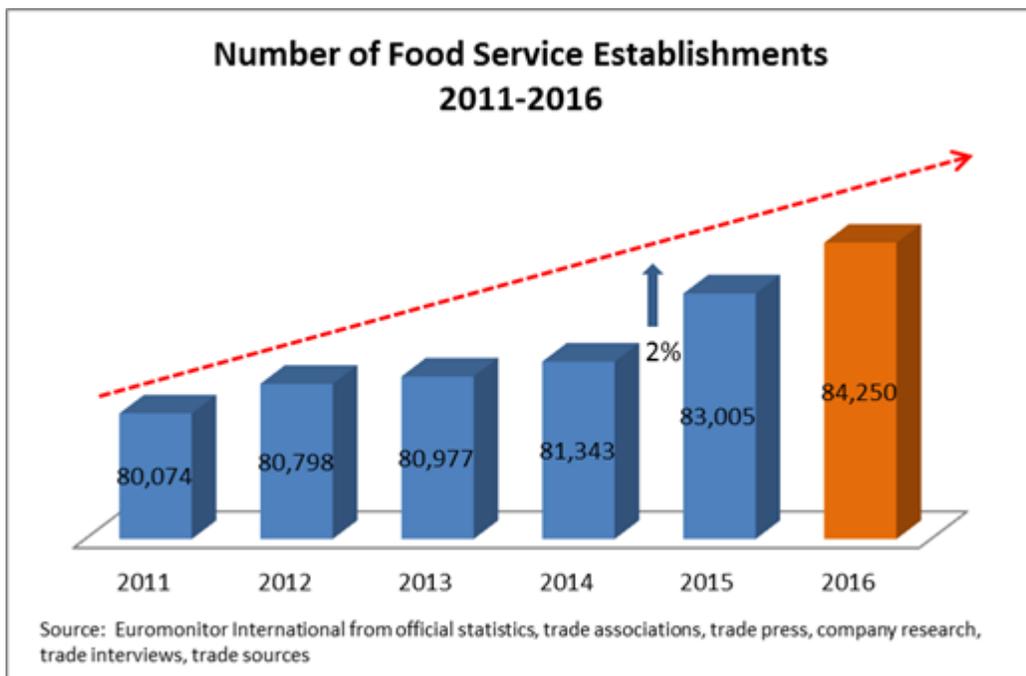
Increasing urbanization (almost 103 million in population)

- Growing upper and middle class (18-20 million)
- Rising number of supermarkets, hypermarkets and convenience stores
- Strong interest in western brands among Philippine consumers
- Growing awareness of the quality and health benefits of U.S. food, beverage and ingredient products

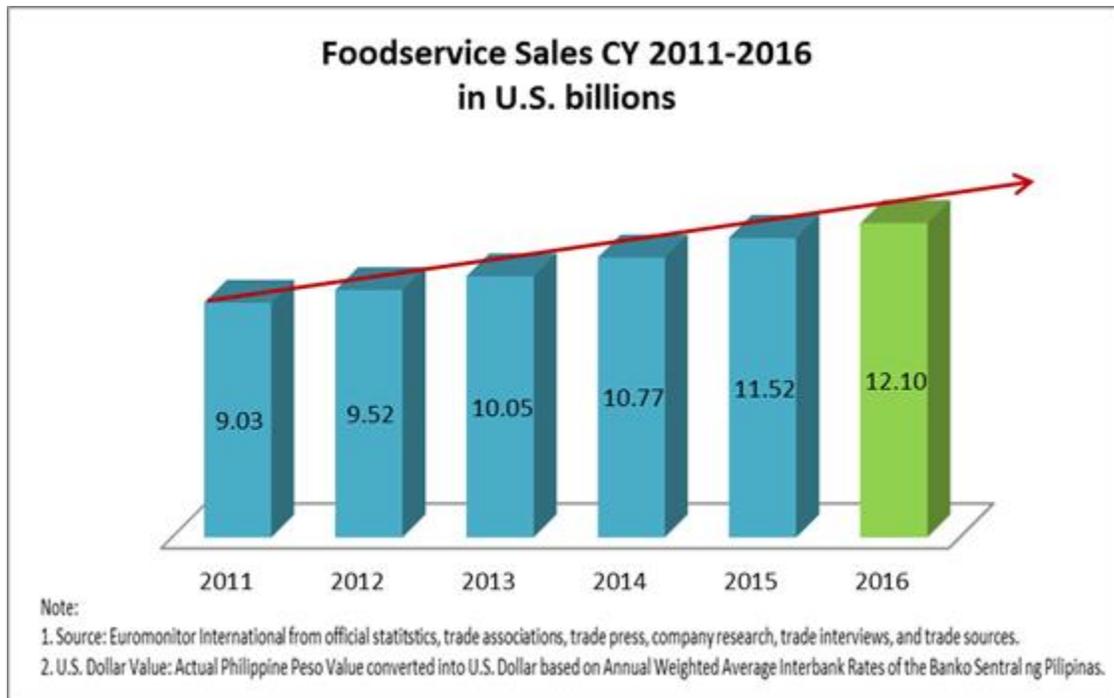
## II. Overview of the Philippine Foodservice Industry

With continued strong economic performance in 2015, the number of foodservice establishments and sales in the Philippines continue to increase. Foodservice establishments increased by 2% in number and sales grew dramatically by almost 7% from 2014 due to increasing frequency of eating out brought by the growing affluence, increasingly busy lifestyles, the desire for convenience and the entry of several international brands in the foodservice industry.

**Chart 2 – Number of Food Service Establishments in the Philippines (2011-2016)**



**Chart 3 – Philippine Foodservice Sales (2012-2016)**



The foodservice industry in the Philippines is dominated by independent players, most of which have outlets in stand-alone locations. Among chain players, local operator Jollibee Foods Corporation leads through its wide portfolio of leading fast food brands. Other important players include Golden Arches Dev Corp (with the McDonald's brand), Ramcar Inc. (Mister Donut and KFC), Pizza Hut, and Shakey's.



For casual dining, Bistro Group, Moment Group, Global Restaurant Concepts, Inc., and LJC Restaurants, are the main players.

**Table 2 - Foodservice by Type**

Types of Foodservice	Description
Independent	One-branch restaurant concept that's often homegrown and starts with limited staff and marketing efforts.
Chain	An independent restaurant with one or more branches. The owner has full control of the operations of each branch in one holding company.
Franchise	A mother company (international or local) that shares branding, marketing efforts, operational systems, and supplies with multiple independent business owners in exchange for royalties and monthly commissions. Can be

	a street stall/kiosk or fast food outlets.
Quick Service/Fast Food	Known for quick food production, serving food in about 10 minutes, these restaurants pre-cook food that can be heated and served quickly when ordered.
Casual Dining	More creative in menu items, boasting of signature food and specialties, and a relaxed ambiance.
Fine Dining	Leisure dining with pricier cuisine and longer service, usually patronized for special occasions and business functions. Usually in stand-alone locations or in high-end hotels and resorts.

Source: Types of Restaurants: Entrepreneur, October 2013

**Table 3 - Foodservice by Location**

Location	Description
Stand-alone (Independent restaurants, cafes, kiosks)	Food service establishments located in a commercial area, near a mall, school, or hospital. Usually, street-stall/ kiosks, food chains, quick service restaurants and cafes.
Retail (Malls and supermarkets)	Restaurants located inside a commercial mall. Usually fast-food chains, quick-service and casual dining restaurants, and cafes.
Travel (Transportation terminals, stations incl. gas stations)	Food service establishments located in airport terminals, bus stations, and service areas alongside motorways and expressways. Usually fast-food chains, quick-service restaurants, cafes and street-stall/ kiosks.
Leisure (Hotels & Resorts)	Restaurants in nearby hotels and resorts.
Lodging (Hotel restaurants)	In-house outlets, exclusive fine dining restaurants located in high-end hotels.

Foodservice through retail posted the highest growth in 2015 with 7.7% increase in sales with 44% market share. This strong position the result of the common practice among Filipinos to head to shopping centers during weekends after work. As such, foodservice outlets located in retail establishments benefit from high foot traffic and are able to serve the requirements of mall-goers after they shop or watch a movie. This, in turn, is driving the consistent expansion of chained shopping malls such as SM and Robinsons, especially those outside Metro Manila.



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**Table 4 - 2015 Figures on Foodservice by Location**

Foodservice by	No. of	No. of Transactions (in	Sales (in US \$)
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Location	Outlets	millions)	
Stand-Alone	44,851	2,240.40	4,459,192,711.92
Retail	26,695	1,277.70	5,033,975,859.38
Travel	6,131	252.10	946,954,885.49
Leisure	3,767	127.00	678,532,745.88
Lodging	1,561	25.90	405,186,103.08
Total	83,005	3,923.10	11,523,842,305.75

Foodservice through travel, meanwhile, generated a significant growth as it expanded by 7% in current value terms. This growth was supported by the availability of low fares from budget airlines and promotions by the Department of Tourism to expand in both domestic and inbound tourism. It is common for consumer foodservice brands located in airport terminals, bus stations and gas stations that service areas alongside motorways and expressways to charge slightly higher prices, which contributed to the strong value growth recorded in foodservice through travel in 2015.

Foodservice through stand-alone grew by almost 6% in 2015, with 39% market share. This is accounted for the growing number of foodservice establishments that are generally more flexible about establishing their own opening and closing policies. Stand-alone outlets are also the best option of chained brands wishing to expand their presence in areas outside of Metro Manila, which tend to have a fewer retail locations available. Some independent players also operate initially through stand-alone units in order to minimize their business risk.



Foodservice through lodging posed an increase of 5% in 2015. This growth was driven by the increasing number of hotels being opened every year (see table 5). In Metro Manila alone, seven huge hotels opened between 2015 and 2016. These hotels have in-house restaurants and bars that continued to be the location with the highest spend per transaction in 2015 since meals and drinks in hotel restaurants are expensive. Moreover, consumers who dine in hotels tend to opt for full meals or buffets. Affluent consumers who frequently dine in this location tend to splurge on food and drinks more as they usually celebrate special occasions whenever they visit.

**Table 5 – List of Recently-Opened Hotels & Proposed Hotels**

Name of Hotel	Location	Rooms	Opening
Novotel Manila Araneta Center	Araneta Center, Quezon City	401	2015
Ascott Bonifacio Global	Bonifacio Global City	220	2016

City			
Conrad Hotel Manila	SM Mall of Asia Complex, Bay City, Pasay	350	2016
Shangri-La at the Fort	West Superblock, Bonifacio Global City, Taguig	577	2016
Mövenpick Hotel Manila	Picar Place, Kalayaan Avenue, Makati	324	2016
Belmont Luxury Hotel Newport	Newport City, Pasay	480	2016
Mercure Manila Ortigas	San Miguel Avenue, Ortigas Center, Pasig	150	2016
Okada Manila Hotel	Aseana Business Park, Paranaque City	993	2017
Grand Hyatt Manila	8th Avenue, Veritown Fort, Bonifacio Global City, Taguig	438	2017
Savoy Hotel	Newport City, Pasay	610	2017
Novotel Manila Emerald Suites	Emerald Avenue, Ortigas Center, Pasig	150	2017
Sheraton Manila	Newport City, Pasay	350	2017
Hilton Manila	Newport Boulevard, Newport City, Pasay	350	2017
Crockfords Tower Manila	Resorts World Bayshore, Entertainment City, Parañaque	NA	2018
Genting Grand Manila	Resorts World Bayshore, Entertainment City, Parañaque	NA	2018
Hotel Okura Manila	Resorts World Bayshore, Entertainment City, Parañaque	NA	2018
The Westin Manila Bayshore	Resorts World Bayshore, Entertainment City, Parañaque	600	2018
Mercure Manila Ermita	Roxas Boulevard, Ermita	500	2018
Novotel Suites Manila	Mandaluyong, Pasig City	310	2019
The Westin Manila Sonata Place	Ortigas Center, Pasig City	NA	2019
Radisson Blu Global City	Bonifacio Global City, Taguig	NA	TBA

Source: Wikipedia: List of Hotels in Metro Manila



Photo: Conrad Hotels & Resorts, one of the luxury arms of Hilton Worldwide, opened in September 2016.

The number of foreign restaurant brands continues to grow through franchising or joint venture. Local foodservice companies prefer to bring in a foreign brand rather than create their own local

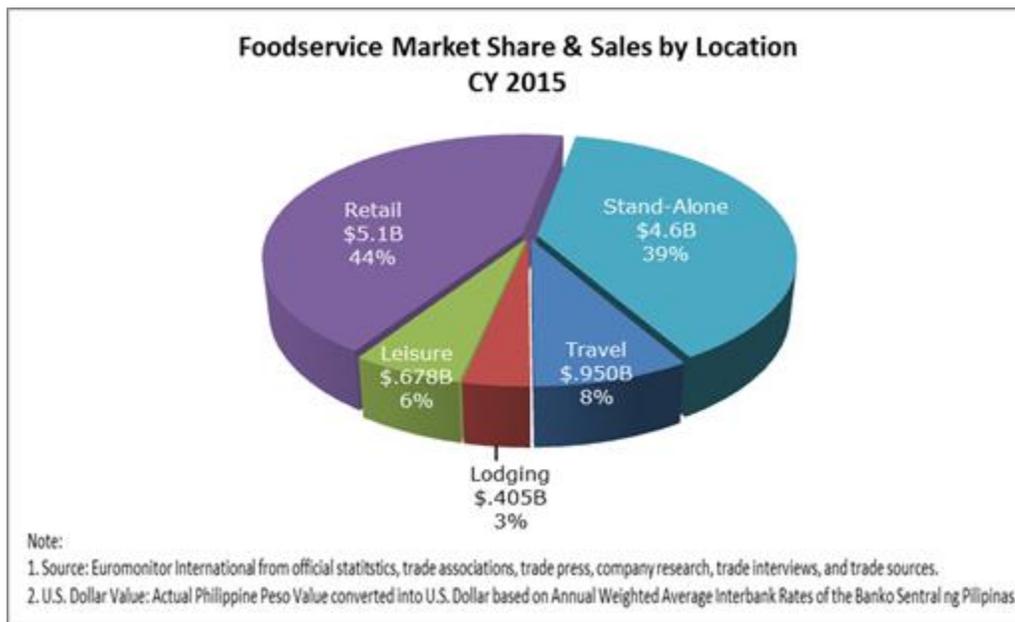
restaurant. This strategy seems to provide better prospects for success since less effort is required to build an established foreign brand restaurant. This approach in the food service industry seems to work as Filipinos in general have high regard for imported brands, which they become familiar with either through their travels abroad or through social media.

**Table 6 – List of Major Foodservice Companies with Popular International Restaurant Brands**

Name of Company	Foodservice Brands/ Subsidiaries
<b>Bistro Group</b>	TGI Fridays
	Italiannis
	Fish & Co.
	Krazy Garlic
	Bulgogi Brothers
	Village Tavern
	Watami
	Modern Shanghai
	Tonkatsu
	Murray & Divine
	Buffalo Wild Wings
	Texas Roadhouse
	Moe’s Southwest Grill
<b>Global Restaurant Concepts, Inc.</b>	Denny’s Diner
	Applebee’s
	IHOP
	California Pizza Kitchen
<b>The Moment Group</b>	PF Chang’s
	8 Cuts
	Din tai Fung
	Linguini Fini
	Manam
	Phat Pho
	Ooma
<b>AM-PHIL Food Concepts</b>	Mecha Uma
	Bank Bar
	Chili’s
	Super Bowl of China
	Wild West Roadhouse Grill
<b>RAMCAR Food Group</b>	Nanbantaei of Tokyo
	Tokyo Tonteki
<b>Max’s Restaurant Group</b>	Salvatore Cuomo & Bar
	KFC
<b>Philippine Pizza Inc.</b>	Mister Donut
	Krispy Kreme
	Jamba Juice

	Taco Bell
<b>Golden Arches Development Corp.</b>	McDonalds
	McCafe
<b>International Family Food Services</b>	Shakey's
	Project Pie
<b>ACA Group of Companies</b>	Quiznos
	Johnny Rockets
<b>Wenphil Corporation</b>	Wendy's
<b>Roasters Philippines</b>	Kenny Rogers
<b>Rustan Coffee</b>	Starbucks
<b>3030 PPP Ventures Inc.</b>	Domino's Pizza
<b>Global Dimsum Food</b>	Tim Ho Wan

**Chart 4 – Philippine Foodservice Market Share & Sales by Location**





The range of foreign brands present in the country are diverse and are not limited to full-service restaurants, it also include fast food, cafes and street stalls/kiosks. Some of the popular brands in the industry that opened since 2015 include Din Tai Fung, The Halal Guys, Denny's Diner, Pink's Hotdogs, Fatburger, Texas Roadhouse, Moe's Southwest Grill, Costa Coffee, and Applebee's.

### III. Advantages and Challenges for U.S. Exporters

Advantages	Challenges
The Philippines has a large base of experienced importers that cater to the HRI sector.	Few importers have a nation-wide distribution network.  The high cost of inter-island shipping makes imported products more expensive in areas outside Manila.
The foodservice sector is familiar with the availability, quality and applications of U.S. F&B products.  The popularity of American holidays and culture lead to Americana-themed promotional events by Philippine restaurants and hotels throughout the year.	Stiff competition from European and Asian F&B products in the market.
Philippine consumers are open to various international cuisines, providing opportunities for a broad range of U.S. F&B products.	Consumers are price-sensitive.
The recent depreciation of the U.S. dollar compared to the Philippine Peso makes U.S. F&B products more affordable and price-competitive.	Prices of U.S. F&B products are still generally higher than regionally imported products.
The rapid urbanization of provincial cities presents opportunities for U.S. F&B products.	Insufficient cold chain infrastructure.

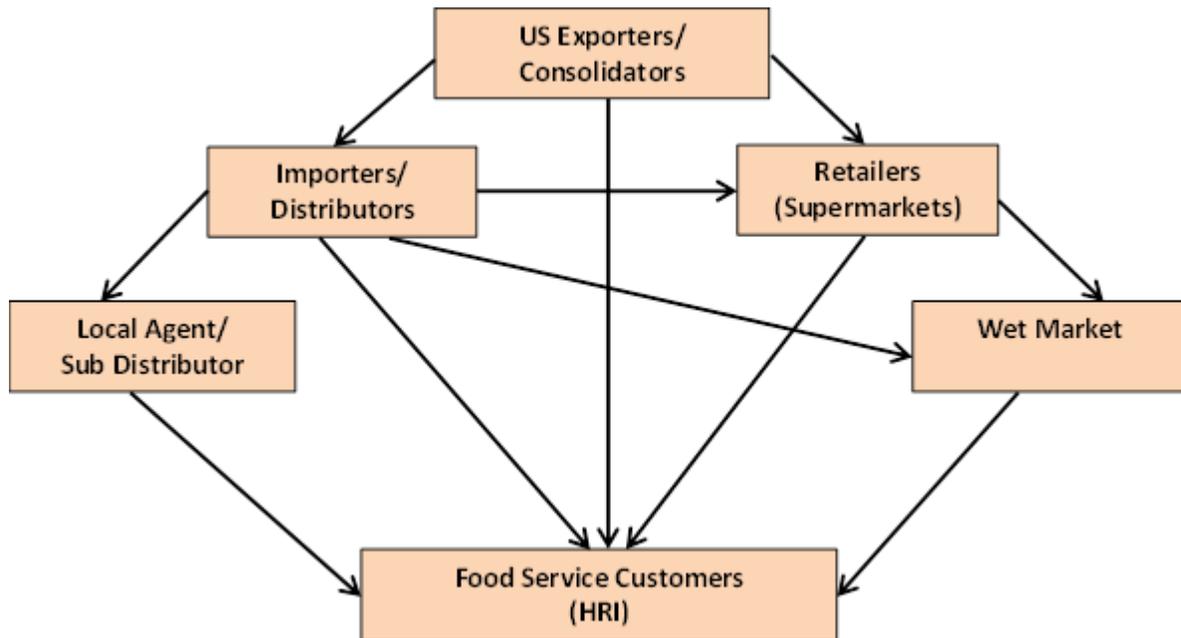
### IV. Roadmap for Market Entry

- U.S. exporters are encouraged to participate in local/regional trade shows and buying missions to meet potential importers and introduce your products.
- Exclusive distributorship agreements are preferred by Philippine importers. U.S. exporters can work with one or several importers provided the market coverage of each importer is properly identified.
- Some Philippine importers maintain buying offices in the U.S. and consolidate their shipments on the West Coast. Others consolidate shipments through third-party U.S. consolidators.
- U.S. exporters are encouraged to maintain close contact with their Philippine importers and support efforts to introducing the products to foodservice customers by participating in technical seminars, product demonstrations, and local trade shows. Regular market visits are also highly valued by Philippine importers and regarded as a show of support.
- U.S. exporters are advised to require payment of goods via a letter of credit, especially for initial transactions. Credit terms may be extended to the importer after conducting a thorough background and credit investigation, and after payment habits have been established. Importers request for ample credit terms since HRI customers demand 30-60 days credit.
- Releasing goods from Philippine Customs sometimes poses a challenge, especially for inexperienced importers.
- General pricing structure: Importers add about 30% to the landed cost (CIF + Duties & Taxes) to arrive at the wholesale price for HRI customers.
- HRI customers rarely import F&B products directly, except for a few fastfood chains. The importation is done mostly by importers and a few retailers.
- Importers distribute directly to HRI customers or appoint sub-distributors.
- A number of importers distribute to the wet market. Wet markets carry lower value cuts of pork and beef, and other products such as: poultry, fruits and vegetables, dried peas, lentils and other ingredients.
- A select number of importers distribute to retailers. There are some HRI customers that buy from retailers due to situations such as stocks running out before the next delivery, difficulty obtaining credit and difficulties meeting the minimum order required for products to be delivered.
- For perishable and temperature-sensitive products, it is important to select an importer that has the capacity to maintain cold-chain storage and transportation. If possible, products should be packed to withstand extreme heat and humidity.
- Expect higher volume of orders from September to December as importers stock-up for the Christmas season (which is marked by higher consumer spending).
- Small to medium size exporters should work with the appropriate U.S. State Regional Trade Group (SRTG) to take advantage of the SRTG's resources for marketing and promotional

support in major export markets. The four SRTGs are non-profit trade development organizations that help U.S. food producers, processors and exporters sell their products overseas. They are jointly funded by USDA's Foreign Agricultural Service (FAS), the individual state departments of agriculture and private industry. The SRTGs provide export assistance to companies located in their geographic region through a variety of export programs and integrated marketing services. To learn more services available from the SRTGs, find the SRTG for your geographic region in the list below and visit the website.

- Western U.S. Agricultural Trade Association (<http://www.wusata.org/>)
- Southern U.S. Trade Association (<http://www.susta.org/>)
- Food Export-Midwest (previously named MIATCO) (<http://www.foodexport.org/>)
- Food Export-Northeast (Previously named Food Export USA) (<http://www.foodexport.org/>)

## V. Philippine HRI Distribution Channel Flow Diagram



## VI. Product Prospects for Food Service Market

Based on industry interviews, roughly 25 percent of all F&B imports flow through the HRI sector. With most analysts projecting sustained growth in the Philippine economy and the HRI sector, Post anticipates continued growth in F&B import demand through 2016 (and beyond) across a wide spectrum of products, with some of the fastest growth potential in convenience, gourmet, and "healthy, natural, and organic" categories.

**Table 7 – U.S. Consumer Oriented F&B Exports to the Philippines**

U.S. Food & Beverage Exports to the Philippines								
CY 2011-2016								
(in Millions of Dollars)								
	Calendar Years (Jan-Dec)					Jan-Sep Comparisons		
	2011	2012	2013	2014	2015	2015	2016	% Change
<b>Food &amp; Beverage Total</b>	<b>773</b>	<b>866.1</b>	<b>997.8</b>	<b>1110.5*</b>	<b>898.4</b>	<b>674.2</b>	<b>660.3</b>	<b>-2.1%</b>
Beef & Beef Products	38.0	44.9	54.5	59.3	63.7*	50.1	38.2	-23.8%
Pork & Pork Products	93.0	88.2	112.3*	103.5	79.5	57.3	55.4	-3.3%
Poultry Meat & Prods.	73.0	89.2	83.2	92.8*	67.7	51.7	60.9	18%
Meat Products NESOI	5.0	5.6	9.5	9.5	11.6*	9.4	6.1	-35.1%
Eggs & Products	2.0	2.2	2.2	2.3*	1.1	0.9	1.9	111.1%
Dairy Products	281.0	317.4	364.0	421.2*	251.2	204.0	157.9	-22.6%
Fresh Fruit	42.0	50.9	60.5	62.6*	51.0	27.4	32.9	20.1%
Processed Fruit	10.0	12.0	13.3	13.0	16.4*	11.9	10.0	-16.0%
Fresh Vegetables	6.0	3.4	5.4	5.6	7.6*	6.4	5.4	-15.6%
Processed Vegetables	44.0	48.1	56.0	70.6	72.8*	52.6	53.8	2.3%
Fruit & Vegetable Juices	8.0	8.3	9.6	11.6	13.6	9.9	8.5	-14.1%
Tree Nuts	5.0	5.5	5.0	7.1	7.8*	5.2	6.4	23.1%
Chocolate & Cocoa Products	32.0	34.8	40.0	40.8	41.5*	31.0	35.8	15.5%
Snack Foods NESOI	34.0	38.2	43.7	51.2*	47.9	35.1	47.0	33.9%
Breakfast Cereals	1.0	0.6	0.6	1.0	1.3	0.8	1.9	137.5%
Condiments & Sauces	14.0	14.2	17.3	20.4	24.9	17.9	25.7	43.6%
Prepared Food	44.0	58.5	69.3	88.5*	84.5	59.6	66.0	10.7%
Wine & Beer	8.0	8.0	9.5	9.0	12.1*	10.1	11.4	12.9%
Non-Alcoholic Bev (ex. Juices)	15.0	13.2	15.6	13.6	17.8	14.3	15.7	9.8%
Dog & Cat Food	19.0	22.4	25.7	26.0*	23.6	17.9	19.0	6.1%
Other Consumer Oriented	1.0	0.6	0.5	0.8	0.6	0.4	0.4	0.0%

**Notes:**

- \* Denote highest export levels since at least CY 1970
- Source: U.S. Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System
- Product Group: BICO-HS10

**Table 8 – Top Ranking Products in 2015 and Top Prospects in 2016**

Below are the top growth prospects for U.S. agricultural high-value products based on interviews with Philippine food service company importers and HRI:

TOP 5 PRODUCTS by VALUE in 2015 (in Millions of Dollars)			TOP 5 PRODUCTS by GROWTH in 2015 (in Millions of Dollars)				
#1	Dairy Products	251.2	#1	Fresh Vegetables	5.6	7.6	36%
#2	Meat & Poultry Products	222.5	#2	Wine & Beer	9.0	12.1	34%
#3	Prepared Food	84.5	#3	Non-Alcoholic Bev (ex. Juices)	13.6	17.8	31%
#4	Processed Vegetables	72.8	#4	Breakfast Cereals	1.0	1.3	30%
#5	Fresh Fruit	51.0	#5	Processed Fruit	13.0	16.4	26%

Source: U.S. Customs as reported in U.S. Department of Agricultural Trade System

<b>"BEST" PROSPECTS for 2016</b>	
Healthy, Natural & Organic Products	Instant or "Convenience" Foods
Gourmet Products	Breakfast Cereals
Beef	Other Dairy Products
Lamb	Preserved Fruits & Pie Fillings
Deli Meats & Cheeses	IQF Fruits & Vegetables
Snack Foods, Dips & Spreads	Fruit & Vegetables Juices
Dried Fruits & Vegetables	Fresh Vegetables
Tree Nuts	Frozen Potatoes (new cuts)
Wine & Craft Beer	Dehydrated Potatoes

The established reputation of U.S. food and beverage products in the HRI sector in terms of quality, availability and versatility represent an advantage for U.S. exporters seeking to develop and expand their market in the Philippines.

### **Top Prospects: Fast Facts & Trends**

#### **Healthy, Natural & Organic Products**

Although U.S. Customs does not track these products as a separate category, retail stores have been increasing shelf-space to accommodate the growing number of new-to-market healthy, natural & organic products because of the rise in disposable income, and the strong consumer trend towards health, wellness and beauty.

#### **Gourmet Products**

Most retailers maintain a gourmet section including products such as meats, seafood, fruits & vegetables, specialty cheeses, sauces & condiments, herbs & spices, wines, craft beers and other beverages, dried fruits & nuts, specialty biscuits, snack foods, and chocolate & confectionery. There are several independent operators of gourmet shops within high-end neighborhoods.

#### **Instant or "Convenience" Foods**

Because of the country's bullish business process outsourcing (BPO) industry that operates around the clock and the rise in the number of women joining the workforce, traders report strong demand in products that can be classified as "convenient" including snack foods, meal-replacements and ready-to-drink beverages. The Philippines is the 8th largest market in the world and the largest market in Southeast Asia for U.S. snack foods, consisting mainly of corn chips, chocolates, potato chips, sweet biscuits, popcorn and confectionery.

## **“Double” Products**

In addition to being consumed directly, many U.S. F&B products (e.g. dairy, meat, poultry, dried fruits and tree nuts) are being used by the Philippines’ booming food processing industry.

## **Dairy Products**

The Philippines is the 6th largest export market in the world for U.S. dairy products. The largest U.S. dairy product export to the Philippines is non-fat dry milk (NFDM). Consumers and the Philippine food processing industry are the major purchasers of NFDM. The Philippines is a key market in Southeast Asia for standard and gourmet U.S. cheese products. Traders are optimistic about the growing market potential of gourmet cheese products due to the booming Philippine economy. Standard cheeses dominate total sales, but gourmet cheeses are gaining popularity and command very high prices (e.g \$20-30/lb).

The U.S. is the second largest over-all dairy supplier to the Philippines, following New Zealand. While New Zealand and Australia enjoy tariff advantages of 1-7 percent on milk powder, cheese, whey and buttermilk as a result of the ASEAN-Australia-New Zealand Free Trade Agreement, currency fluctuations play a significant role in the competitiveness of U.S. products.

## **Beef Products**

U.S. beef exports have been robust as U.S. prime rib and other high-value cuts have become standard menu offerings. The growth is expected to continue as incomes rise, and the number of finer dining options proliferate throughout the country. Strong growth in exports of high-value pork cuts and prepared/preserved pork products to supermarkets, hotels and restaurants are expected to continue.

## **Poultry Meat**

The Philippines remains the largest market in Southeast Asia for U.S. poultry. While a growing market for nearly all categories, the trade estimates mechanically deboned meat (MDM) for use in the food processing industry comprise 75 percent of U.S. poultry exports in 2015.

## **Prepared Food**

Traders report growth in sales of baking ingredients such as cocoa products, pre-mixes, jams and jellies, and flavorings due to the proliferation of small bakeshops that sell premium-quality artisanal baked goods.

## **Processed Vegetables**

The Philippines is the 7th largest export market in the world for U.S. frozen potatoes. There are excellent opportunities for multiple products in this category.

## **Fresh Fruits**

The Philippines is the 14th largest export market in the world for fresh fruits, and a key market for other U.S. fresh fruits such as apples, oranges, lemons, pears and cherries. There is a growing demand for melons, pears, berries and stone fruits.

## **Fresh Vegetables**

The Philippines formally opened its market to U.S. fresh celery, lettuce, and cruciferous vegetables (e.g. broccoli and cauliflower) in 2014. As the only country with official access to the entire Philippine market for these temperate climate vegetables (which are in limited supply domestically), U.S. exporters are poised to take advantage of opportunities in the booming Philippine food service and retail sectors.

Further, the Philippines allowed the importation of U.S. fresh table stock potatoes for consumption. In the past, U.S. fresh potatoes entering the Philippine market were restricted to chipping and processing purposes.

## **VII. Further Information & Assistance**

USDA-FAS in Manila is ready to help exporters of U.S. food and beverage products achieve their objectives in the Philippines. For further information or assistance please contact:

U.S. Department of Agriculture  
Foreign Agricultural Service  
Embassy of the United States of America  
1201 Roxas Boulevard  
Manila, Philippines  
Trunk Line: (632) 301-2000  
Email: AgManila@fas.usda.gov

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