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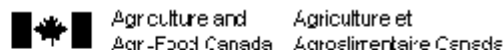
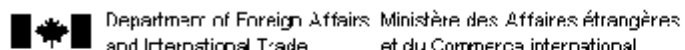
The Confectionery Market in the Philippines

June 1997

*(Également disponible en français sous le titre,
Le marché des confiseries aux Philippines)*

Prepared by the

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and the
Canadian Trade Commissioner Service**



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THE CONFECTIONERY MARKET IN THE PHILIPPINES



EXECUTIVE SUMMARY

This report examines the confectionery market in the Philippines. It is intended to provide Canadian exporters with market information. The information contained in this report was drawn primarily from secondary sources and the Canadian Embassy in Manila.

The Philippines consumed C\$313 million worth of confectionery in 1995, the majority of which was produced domestically. The total market showed little growth, but imports have been growing rapidly in the last few years.

Canada does not currently export much confectionery to the Philippines, but the market looks promising for export growth. Canadian products are seen as high quality, premium products. Local manufacturers are starting to extensively promote confectionery in general, which will aid Canadian sales.

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THE CONFECTIONERY MARKET IN THE PHILIPPINES



Retail sales of confectionery products in the Philippines reached C\$313 million in 1995, an increase of 1.6% over 1991 sales. This is not reflective of the true growth in confectionery sales as in this same period volume sales increased 7.1%. The lack of value growth came as a result of chocolate confectionery producers cutting prices to boost sales. Domestic producers supply approximately 65% of confectionery sold in the Philippines, as they are much cheaper than imports. Imports of confectionery items, however, are growing at a tremendous rate, increasing 208% between 1991 and 1995. As consumers have a preference for imported confectionery items and as tariffs are beginning to fall, the outlook is positive for Canadian exporters.

MARKET OVERVIEW

Market size and projections

The total Philippine confectionery market showed little growth over the past several years. However, the two types of confectionery, sugar and chocolate, differ significantly in this regard. Sugar confectionery sales totalled C\$143.95 million in 1995, up 52.3% since 1991. However, the volume growth was only 3.5%, indicating that prices increased substantially on sugar confectionery. The value of chocolate confectionery sales decreased 20.9% between 1991 and 1995, falling to C\$168.87 million. Volume sales, however, actually increased 9.9% as producers cut their prices dramatically in order to boost sales. (See Table 1)

The average consumer of confectionery belongs to the urban middle- to upper-class. Ten percent

of the population currently falls into this category, most of whom are located in metropolitan Manila and southern Tagalog. The majority of Filipinos cannot afford confectionery items on a regular basis but their purchases surge in the fourth quarter during the holiday season. Sales of chocolate confectionery have been hampered by poor distribution to rural areas. Domestically-manufactured hard candies are usually the only confectionery available in the rural areas.

Table 1. Confectionery products sales in the Philippines, 1991 to 1995 and projections to 2000

| | <u>Sugar Confectionery</u> | | <u>Chocolate Confectionery</u> | |
|----------------|-----------------------------------|------------------------------|-----------------------------------|------------------------------|
| | Value (in C\$ millions) | Volume (in tonnes) | Value (in C\$ millions) | Volume (in tonnes) |
| 1991 | \$94.51 | 30 959 | \$213.38 | 26 752 |
| 1992 | 108.72 | 31 578 | 218.72 | 27 153 |
| 1993 | 132.62 | 31 208 | 221.23 | 27 719 |
| 1994 | 137.74 | 31 771 | 167.54 | 28 500 |
| 1995 | 143.95 | 32 407 | 168.87 | 29 412 |
| 1996 | na | 33 055 | na | 30 440 |
| 1997 | na | 33 780 | na | 31 535 |
| 1998 | na | 34 620 | na | 32 605 |
| 1999 | na | 35 380 | na | 33 580 |
| 2000 | na | 36 085 | na | 34 590 |
| Growth: | | | | |
| 1991-1995 | 52.3% | 3.5% | -20.9% | 9.9% |
| 1996-2000 | na | 9.2% | na | 13.6% |

Source: Euromonitor *The Market for Packaged Foods in South East Asia*, 1996.

Table 1 shows that volume sales of sugar and chocolate confectionery are expected to grow 9.2% and 13.6% respectively by the year 2000. Filipinos have the lowest confectionery consumption in south east Asia and consume less than 10% of North American consumption levels; thus there is significant room for growth.

There is still a strong preference for imported chocolate products because of their higher quality even though they are more expensive than the domestic chocolate.

As economic conditions improve, more Filipinos will be able to afford confectionery. GDP per capita is forecasted to reach C\$1375 by 1998. Also, consumer preferences for confectionery are favourable as over 50% of the population is younger than 24 years of age, normally the largest buyers of sweets and chocolates.

The competitive environment

Local confectionery producers supply the majority of confectionery consumed in the Philippines. These producers are mostly diversified and have extensive product lines and distribution networks. This generally gives them excellent market coverage, especially in the case of the sari-sari (convenience) stores.

.Table 2. Confectionery market shares in the Philippines 1995

| <u>Sugar Confectionery</u> | | <u>Chocolate Confectionery</u> | |
|----------------------------|-----|--------------------------------|-----|
| CFC McVitie | 28% | CFC McVitie | 19% |
| Van Melle Philippines | 18 | Hershey Foods | 15 |
| Candyman Inc | 15 | Van Melle Philippines | 12 |
| Commonwealth Foods | 10 | Nestlé Philippines | 10 |
| Columbia Candy Factory | 7 | Blue Bar Coconut Philippines | 8 |
| Pure Foods | 5 | Mars | 8 |
| Nestlé Philippines | 5 | Anciano Store | 8 |
| Others | 12 | Kraft General Foods | 5 |
| | | Others | 15 |

Source: Euromonitor *The Market for Packaged Goods in South East Asia, 1996*

As seen in Table 2, the top four manufacturers of sugar and chocolate confectionery have 71% and 56% of the market respectively.

Table 3 demonstrates that imports of sugar confectionery showed explosive growth between 1991 and 1995, increasing 483% to reach a total of C\$31 million. As a result of this enormous growth, imported sugar confectionery increased as a share of total Philippine sales from 5.6% to 21.5% over the same period.

Table 3. Imports of Sugar Confectionery by Country, 1995 (C\$000s, SITC 0620)

| Supplier | 1991 | 1992 | 1993 | 1994 | 1995 |
|---------------|-------|--------|--------|--------|--------|
| World | 5 372 | 10 825 | 10 937 | 20 275 | 31 053 |
| United States | 2 974 | 7 696 | 3 052 | 6 358 | 10 369 |
| Indonesia | 75 | 63 | 678 | 5 150 | 7 731 |
| Australia | 107 | 46 | 75 | 503 | 4 208 |
| Switzerland | 446 | 568 | 2 592 | 81 | 2 006 |
| Hong Kong | 613 | 1 427 | 2 733 | 1 978 | 1 716 |
| Canada | - | - | - | 17 | 47 |

Source: TEAD/IMB/MISB/AAFC Data: StatsCan, WTDB

Local chocolate confectionery producers represent over 60% of chocolate sales in the Philippines. Consequently, the Philippine government has identified the chocolate confectionery industry as a priority industry to be given assistance by the government due to its high employment generation and strong export potential.

Overall, the best selling brands are: *Hershey, Nestlé, Toblerone, Twix, Milkyway, Mars, and 3 Musketeers*. Local competitors have recognized the relatively low consumption levels of chocolate confectionery and are attempting to increase consumption through more innovative packaging and aggressive marketing. In addition, there is a trend towards promoting chocolate confectionery not only as a favourite treat for children, but also as a snack or dessert item for adults.

In 1995, imports of chocolate confectionery stood at C\$77 million, an increase of 159% since 1991. With this increase imported chocolate accounted for 46% of all Philippine sales.

Table 4. Imports of chocolate confectionery by Country, 1995 (C\$000s, SITC 1730)

| Supplier | 1991 | 1992 | 1993 | 1994 | 1995 |
|-----------------|-------------|-------------|-------------|-------------|-------------|
| World | 29 857 | 35 187 | 42 583 | 63 841 | 77 338 |
| United States | 4 847 | 11 007 | 13 660 | 17 246 | 17 441 |
| Singapore | 10 284 | 7 300 | 3 449 | 7 385 | 11 953 |
| Indonesia | 3 174 | 3 455 | 5 143 | 5 967 | 9 210 |
| Malaysia | 3 265 | 2 049 | 690 | 5 169 | 8 325 |
| Hong Kong | 959 | 831 | 2 216 | 3 427 | 7 809 |
| Canada | - | - | - | 11 | 150 |

Source: TEAD/IMB/MISB/AAFC Data: StatsCan, WTDB

The Canadian position

As seen in Tables 3 and 4, in 1995, Canada exported a total of C\$197 000 worth of confectionery to the Philippines. Strong domestic competition, poor economic conditions and high tariffs may help explain these low import figures. As domestic producers are now aggressively promoting confectionery items, demand is likely to increase. Therefore, this is a good entry time for new exporters.

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DISTRIBUTION CHANNELS

Overview of distribution system

Importers and intermediaries

Filipino agents/distributors perform a full range of functions, including negotiating sales transactions and providing for the movement and storage of the product. Distributors vary in size; some distribute only to Metro Manila whereas others service provincial commercial centres such as Cebu, Davao, Iloilo, and Baguio. To check on the validity of an agent, a Canadian vendor should confirm that the agent is registered with the Philippine Securities and Exchange Commission. There are no Philippine laws that impede termination of an agent/distributor contract, should either party wish to do so. However, contracts will usually specify that 30 days notice is required. A listing of some confectionery importers is provided in Appendix C.

Retail distributors

Distribution is largely limited to supermarkets and convenience stores in the large urban areas, with Metro Manila being the largest market. The greater Manila area accounts for about 70% of the Philippines' consumer market and thus most major supermarket and department store chains and shopping malls are found there.

Among the most popular outlets are sari-sari stores, or convenience stores. Most of the sari-sari stores must negotiate the selling price of chocolate confectionery items. Larger retailers like groceries and supermarkets, however, have the option of sourcing imported cocoa products either from duty free shops in Cebu, Manila, and Subic, from major distributors, or directly from foreign suppliers.

A few of the larger chains such as Shoemart and Rustans import some products directly, but this

trend has only emerged recently. When selling direct, the Canadian vendor should carefully check the creditworthiness of the retail distributor; a good rule of thumb is to target outlets which are acceptable to major credit cards.

Promotional considerations

As the Philippines is a brand-conscious market, advertising plays a significant part in promoting the sale of most nondurable consumer goods. In urban areas approximately half of the population possesses televisions and two-thirds possess transistor radios. Additionally there are 20 national newspapers, of which nine are published in English. The widest circulated paper is the *Manila Bulletin* among other popular papers such as: *Manila Times*, *Manila Chronicle*, *Philippine Daily Inquirer*, *Philippine Star* and *Manila Standard*.

Canadian exporters should provide full support to their local representative. This will entail periodic visits with representatives to devise marketing techniques and keep abreast of industry changes. Also, the Canadian exporter should ensure that their local representatives are making sales calls on regular customers.

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CONSIDERATIONS FOR MARKET ENTRY

Local standards and regulations

Packaging and labelling

All labels must bear the following in Filipino or English:

- name, in bold letters, which indicates the true nature of the food. The type of packing medium (ie. freeze-dried) must also be indicated unless clearly illustrated;
- list of ingredients in descending order of proportion;
- net contents and drained weights must be declared in metric;
- name, address, and country of origin of manufacturer, packer, or distributor; and
- lot identification code.

The penalties for improper labelling, which are mainly intended to discourage smuggling, range up to P5000 (C\$260) in fines and six months in prison. If a legitimate shipment does not bear a proper mark or origin, it is subject to a marking duty equal to five percent ad valorem. There are exemptions from the marking requirement including if the article cannot be marked prior to shipment without injury or prohibitive expense. The packing container, however, must be labelled with the country of origin or be subject to a five percent duty.

The Canadian Embassy in Manila can provide greater detail on the above information.

Documentation and procedures

Required documentation

a) Import permit:

All import shipments with a value above P5000 (C\$260) are subject to a fixed import processing

fee of P250. This fee shall be paid by the importer/consignee to the authorized agent bank.

b) Food registration requirements are as follows:

- letter of application from manufacturer/exporter/importer;
- valid licence to operate (LTO);
- certificate of brand name clearance from BFAD (Bureau of Food and Drugs);
- product information;
- product samples;
- labels and labelling materials;
- certificate of analysis;
- manufacturing method, packaging and quality control;
- stability data;
- certificate of agreement between the foreign manufacturer or distributor and the importer or local distributor;
- government certificate of clearance and free sale of the product from the responsible government authority in the country of origin and duly authenticated by the Philippine Consulate abroad; and
- evidence of registration for payment.

The Canadian Embassy in Manila can provide greater detail on the above information.

c) Shipping documents:

The following shipping documents must be presented to customs officials by the agent/importer upon the entry of exported goods into the Philippines:

- Declaration of import entry;
- Commercial invoice signed and in triplicate, taking care to include:

- (1) Brand and name of article being shipped.
- (2) Name and address of manufacturer.
- (3) Date of departure or carrying vessel from country, port of exportation, as well as port of entry in the Philippines.
- (4) Cost of packaging.
- (5) Inland freight.
- (6) Other charges, excluding authentication fees.

Also attached to the invoice should be a special declaration in triplicate and visaed for US\$20 (C\$28) by the Consulate;

- Bills of Lading - in three negotiable and five non-negotiable copies;
- Letter of credit: required for all imports valued at more than US\$500. Exceptions are allowed in documents-against-acceptance and open-account arrangements, consignments, and no-dollar and lease/purchase arrangements;
- Packing list- one copy;
- Certificate of origin- certified by a chamber of commerce and Consulate General of the Philippines;
- Insurance certificate; and
- Pre-shipment inspection form from the Societe Generale de Surveillance.

Authentication of documents

Documents that need to be authenticated, such as certificates of sale and letters authorizing an

exporter's local agent or importer to act on their behalf, must first be notarized in Canada. Thereafter, the notarized documents can be authenticated by sending them to (there is no fee for this service):

Department of Foreign Affairs and International Trade
 Authentication and Service of Documents (JLAC)
 125 Sussex Drive, Ottawa K1A 0G2
 ATTN: Mario Nuñez-Suarez
 Telephone: (613) 992-6602
 Facsimile: (613) 992-2467

Customs duties, tariffs and taxes

The Societe Generale de Surveillance (SGS) on behalf of the Philippine government inspects shipments with a value of over US\$500 (C\$690) prior to shipment to determine its Home Consumption Value (HCV) for duty purposes. The HCV is based on the wholesale value in the exporting country, which includes federal and provincial taxes, plus shipping and insurance charges. This has the effect of substantially increasing the customs value of imported goods, thereby increasing the tariffs and excise taxes assessed. In addition, SGS inspectors are often unavailable and can cause expensive shipping delays.

To conform to GATT regulations, the Government has committed to replace HCV with a variation of the Brussels definition of value as an interim step to shifting to a transaction value-based system (TV). However, these changes will not likely occur for a few years as the Philippine legislation is still pending and the Government has recently renewed a contract (until March 1998) with the SGS.

Tariff rates are high on confectionery items, but as with many other commodities, are undergoing reform. In addition there is a 10% value added tax applied to confectionery items.

| | Previous Tariff Rate | 1996 Tariff Rate | 1998 Tariff Rate | 2000 Tariff Rate |
|--------------------------------|---------------------------------|-----------------------------|-----------------------------|-----------------------------|
| Sugar Confectionery | 50 | 30 | 20 | 20 |
| Chocolate Confectionery | 50 | 10 | 10 | 10 |

Transportation and storage

Generally, most confectionery products are imported by ship into the port of Manila where storage facilities are adequate.

Export financing and payment

A Letter of Credit is required for all imports valued at more than US\$500. Exceptions are allowed in documents-against-acceptance and open-account arrangements, consignments, and no-dollar and lease/purchase arrangements. Payment terms under documents-against-acceptance and open-account arrangements generally may not exceed 360 days; longer terms require Central Bank approval. For initial transactions, secured terms are recommended for which credit of 30 to 60 days normally apply.

Cultural and business practices

Canadian exporters need to understand the cultural nuances of doing business in the Philippines.

English is the accepted language of doing business. Short, casual handshakes and eye contact is the traditional greeting, although a man should not initiate a handshake with a woman, rather he should wait for her to extend a hand. Filipinos are extremely sensitive to Hiya (shame) and accordingly are very sensitive about individual public image and self-esteem. Favours are highly regarded and expect to be returned "with interest". Decisions will often take a significant period of time and "yes" can have a variety of meanings. When attending meetings, it should be noted that they often start half an hour to an hour late. Finally, direct confrontation should be avoided.

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Agriculture and Agri-Food Canada, *Export Market Assessment Report: Philippines*, October 1996.

Department of Foreign Affairs and International Trade, *Philippines: A Guide for Canadian Business* (14CA English, 14CF Français), 1995

Department of Foreign Affairs and International Trade, Philippines: *Sectoral Brief on Food* (286A), 1993.

Euromonitor International, *The Market for Packaged Foods in South East Asia*, Great Britain, 1996.

Bureau of Food and Drugs, Ministry of Health, Republic of the Philippines, *Rules and Regulations Governing the Labelling of Prepackaged Food Products Distributed in the Philippines*, 1984.

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APPENDIX A — STATISTICAL TABLES

Imports of sugar confectionery by Country, 1991-95, (C\$000s, SITC code 0620)

| Supplier | 1991 | 1992 | 1993 | 1994 | 1995 |
|----------------|-------|--------|--------|--------|--------|
| World | 5 372 | 10 825 | 10 937 | 20 275 | 31 053 |
| United States | 2 974 | 7 696 | 3 052 | 6 358 | 10 369 |
| Indonesia | 75 | 63 | 678 | 5 150 | 7 731 |
| Australia | 107 | 46 | 75 | 503 | 4 208 |
| Switzerland | 446 | 568 | 2 592 | 81 | 2 006 |
| Hong Kong | 613 | 1 427 | 2 733 | 1 978 | 1 716 |
| Spain | 69 | 577 | 574 | 470 | 1 518 |
| Taiwan | 8 | 26 | 128 | 208 | 920 |
| United Kingdom | - | 35 | 208 | 432 | 728 |
| Singapore | 822 | 204 | 564 | 1 532 | 550 |
| France | 257 | - | 11 | 118 | 297 |
| China | - | - | 47 | 158 | 181 |
| Japan | - | 11 | 10 | 29 | 147 |
| Germany | - | - | 103 | 226 | 131 |

| | | | | | |
|--------------|---|----|----|-----|-----|
| Malaysia | - | - | - | 94 | 128 |
| Korea | - | 15 | 35 | 65 | 110 |
| Thailand | - | - | 54 | 188 | 71 |
| Italy | - | - | - | - | 68 |
| South Africa | - | - | - | - | 51 |
| Canada | - | - | - | 17 | 47 |

Source: TEAD/IMB/MISB/AAFC Data: StatsCan WTDB

Imports of chocolate confectionery by Country, 1991-95, (C\$000s, SITC code 0730)

| Supplier | 1991 | 1992 | 1993 | 1994 | 1995 |
|------------------|--------|--------|--------|--------|--------|
| World | 29 857 | 35 187 | 42 583 | 63 841 | 77 338 |
| United States | 4 847 | 11 007 | 13 660 | 17 246 | 17 441 |
| Singapore | 10 284 | 7 300 | 3 449 | 7 385 | 11 953 |
| Indonesia | 3 174 | 3 455 | 5 143 | 5 967 | 9 210 |
| Malaysia | 3 265 | 2 049 | 690 | 5 169 | 8 325 |
| Hong Kong | 959 | 831 | 2 216 | 3 427 | 7 809 |
| Switzerland | 1 635 | 1 981 | 6 133 | 8 585 | 7 084 |
| United Kingdom | 1 459 | 3 102 | 2 317 | 3 044 | 4 122 |
| Australia | 339 | 653 | 1 714 | 3 037 | 3 454 |
| Ghana | - | 44 | 879 | 1 046 | 1 485 |
| Netherlands | 182 | 535 | 438 | 1 124 | 1 342 |
| Papua New Guinea | 2 131 | 578 | 3 449 | 4 088 | 1 111 |
| Belgium-Lux | 186 | 1 454 | 628 | 800 | 757 |
| Taiwan | 164 | 635 | 222 | 781 | 664 |
| France | 279 | 32 | 561 | 561 | 471 |
| Germany | 111 | 400 | 163 | 520 | 410 |
| Ivory Coast | 567 | 178 | - | 265 | 347 |
| Spain | 56 | 82 | 86 | 172 | 264 |
| Thailand | 115 | 645 | 558 | 196 | 219 |
| Canada | - | - | - | 11 | 150 |

Source: TEAD/IMB/MISB/AAFC Data: StatsCan, WTDB

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APPENDIX B — TRADE SHOWS AND PROMOTIONAL VENUES

| Event / Description | Organizer / Contact |
|--|--|
| Forbes International Food and Beverage Fair February 1, 1997 (annual) | Philippine Centre for International Trade and Exhibitions Telephone: (2) 822 0304 |

Convention Centre Manila
Exhibition had 12,972 sq m with a total of 336 exhibitors and 25,039 attendees last year.

Telephone: (2) 832-0504
Facsimile: (2) 832-3414

National Food Festival
November (annual)
International Trade Centre
Pasay City

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APPENDIX C — CONFECTIONERY IMPORTERS AND LOCAL MANUFACTURERS IN THE PHILIPPINES

Confectionery importers

Bavaria Food Processing Phils., Inc.
Mr. Danny Caasi
Rm, 401 Sunrise Cond.
226 Ortigas Ave., Greenhills
San Juan, Metro Manila Philippines
Telephone: 63027211759
Facsimile: 63027211689

CSP International Commodities Corp.
Ms. Maritess G. Concepcion
3/F G&A Building
2303 Pasong Tamo Extension
Makati City, M.M. Philippines
Telephone: 8190137 / 0652
Facsimile: 63028161116

Duty Free Shoppers, Inc.
Ms. Beverly C. Abad
Suite 1905 19/F Centerpoint Condmn.
Julia Vargas Cor. Garnet St.
Pasig City, Metro Manila Philippines
Telephone: 63026358869 or 70
Facsimile: 63026335593

Europa Delicatessen & Butcher Shop
Mr. Markus Stern
Director
Diplomat Bldg.
91 F. Ramos Street
Cebu City, Cebu Philippines
Telephone: 0322537012
Facsimile: 63322537074

CanAsia Traders, Inc.
Mr. Steve L. Sy Uy
No. 3 Calle Industria Rd. Libis
Quezon City, M.M. Philippines
Telephone: 7148060
Facsimile: 63027124851

Duty Free Philippines
Mr. Benjamin Lim
Fiesta Shopping Centre
Ninoy Aquino Ave.,
Paranaque, Metro Manila Philippines
Telephone: 63028338720
Facsimile: 63028314361

Duty Free Supermarket
Mr. Anthony A. Po
Fiesta Shopping Complex
Ninoy Aquino Avenue
Paranaque, M.M. Philippines
Telephone: 63028313892 D.L.
Facsimile: 63028313286

Macondray & Co., Inc.
Mr. Danilo I. Perreras
2263 Pasong Tamo Extension
Makati City, Philippines
Telephone: 8120651 to 55
Facsimile: 63028120629

PTC Commercial Corporation
 Mr. Sherwin Choi
 President & Managing Director
 Rm. 551, Wellington Bldg.
 Binondo, Metro Manila Philippines 1006
 Telephone: 63022433146
 Facsimile: 63022531123

Reliance Commercial Enterprises, Inc
 Mr. Philip Huang
 5/F Sen Gil Puyat Ave, Comfoods Bldg.
 Makati City, Metro Manila Philippines
 Telephone: 63028445661
 Facsimile: 63022817884

Confectionery manufacturers

Commonwealth Foods, Inc.
 Mr. Francisco Aquino
 Comfoods Building
 Sen. Gil Puyat Avenue corner Chino Roces
 Makati City, Philippines
 Telephone: 844-56-61, 844-88-91
 Facsimile: 63028178845

Nestle Philippines, Inc.
 Mr. Juan B. Santos
 335 Sen. Gil Puyat Ave.
 Makati City, Metro Manila Philippines
 Telephone: 63028980001 to 20
 Facsimile: 63028980034

Puratos (Phils.), Inc.
 Mr. Bernard Paplinot
 Unit 9 Southway Condominium
 Bakawan St., Makati
 Metro Manila, Philippines

Serg's Products, Inc
 Ortigas Avenue Extension
 Cainta, Rizal Philippines
 Telephone: 655-0154/3015/7873
 Facsimile: 63026550148

Universal Robina Corporation
 Mr. Henry L. Go
 CFC Corporation
 Universal Consolidated Group
 Manila, Metro Manila Philippines
 Telephone: 63026350824 D.L.
 Facsimile: 63026350830

Van Melle Phils., Inc.
 Ms. Lourdes Garcia
 No. 4 Pioneer Street
 Mandaluyong city, Metro Manila Philippines
 Telephone: 6347653 to 56
 Facsimile: 63026353138

Warner-Lambert Philippines, Inc.
 Mr. Roberto S. Mena, Jr.
 Operations Manager
 112 Eagle Street
 Ugong
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 Telephone: 63026719967 to 76
 Facsimile: 63026715936

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APPENDIX D — KEY GOVERNMENT CONTACTS AND SUPPORT SERVICES

Canadian government contacts

Canadian Embassy
P.O. Box 2168
Makati Central, Metro Manila
Philippines 1299
Telephone: (632) 810-8861
Facsimile: (632) 810-1699

Agriculture and Agri-Food Canada
930 Carling Ave, Ottawa, K1A 0C5
Contact: Randy Nelson
Telephone: (613) 759-7637
Facsimile: (613) 759-7506

Department of Foreign Affairs and
International Trade
Southeast Asia Division (PSE)
125 Sussex Drive, Ottawa K1A 0G2
Contact: Mr. Khawar Nasim
Telephone: (613) 995-7662
Facsimile: (613) 944-1604

Canadian Export Development Corporation
151 O'Connor St, Ottawa, K1P 5T9
Telephone: (613) 598-2500
Facsimile: (613) 598-2503

Philippine government offices in Canada

Embassy of the Philippines in Canada
130 Albert St., Suite 606
Ottawa, ON, K1P 5G4
Telephone: (613) 233-1121
Facsimile: (613) 233-4165

Societe Generale de Surveillance
42 Broadway
New York, NY, 1004
Telephone: (212) 482-8700
Facsimile: (212) 482-0048

Philippine Consulate General
Mr. Dante F.M. Ang,
Foreign Information Officer
151 Bloor St. West, Suite 365
Toronto, ON, M5S 1S4
Telephone:(416) 922-7181
Facsimile:(416) 922-3638

Philippine Consulate General
301-308, 470 Granville St.
Vancouver, B.C., V6C 1V5
Telephone:(604) 685-7645
Facsimile:(604) 685-9945

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8458-182 Street
Edmonton, AB, T5T 1Y7
Telephone:(403) 450-0905
Facsimile:(403) 484-7103

Philippine government offices in the Philippines

Bureau of Customs
Contact: Ms. Elizabeth Guerrero
NAIA Road, Pasay City
Telephone: (632) 491-928
Facsimile: (632) 530-0966

Bureau of Foods and Drugs
DOH Compound, Alabang
Muntinlupa, Metro Manilla
Telephone:(632) 842-4583
Facsimile:(632) 842-4603

Centre for International Trade
Expositions and Missions
ITC Complex
Roxas Blvd., cor. Sen. Gil J. Puyat Ave.
Pasay City, Metro Manila
Telephone:(632) 831-2201
Facsimile:(632) 832-3965

Department of Finance
DOF Bldg, Valencia Circle
Ermita, Metro Manila
Telephone:(632) 595262
Facsimile:(632) 521-9495

Department of Trade and Industry
Trade and Industry Bldg
361 Gil J. Puyat Ave. Ext., POB 2303
Makati, 3117, Metro Manila
Telephone:(632) 818-5701
Facsimile:(632) 856-487

National Economic Development Authority
NEDA Bldg., Amber Ave., Pasig
Metro Manila
Telephone:(632) 631-0945
Facsimile:(632) 631-3747

Department of Agriculture
692 San Andres
Malate, Manila
Telephone:(632) 571-726
Facsimile:(632) 521-7650

Tariff Commission
Ms. Nilda D. Vasquez, Chairman
5th Floor, Philippine Heart Centre
East Avenue, Quezon City
Telephone: (632) 998-419
Facsimile:(632) 921-7960

Chambers of commerce and industry associations

Asia-Pacific Foundation of Canada
999 Canada Place, Suite 666
Vancouver, B.C.
V6C 3E1
Telephone: (604) 684-5986
Facsimile: (604) 681-1370

Canadian Chamber of Commerce and Industry
Ground Fl., InterBank Bldg.
Paseo de Roxas
Makati, Metro Manila
Telephone: (632) 812-8568

Chamber of International Trade
Ground Fl, Peralas Bldg
646 Quezon Ave.
Quezon City, Metro Manila
Telephone: (632) 712-0193

Philippine Chamber of Commerce and Industry
Rogelio Murga, President
3rd Floor, Padilla Bldg. Emerald Ave.
Ortigas Complex, Pasig City
Telephone: (632) 833-8591
Facsimile: (632) 833-8895

World Trade Centre Metro Manila
15th Fl., Solidbank Bldg.
Paseo de Roxas
1200 Makati, Metro Manilla
Telephone: (632) 819-7232
Facsimile: (632) 819-7205

Canadian banks in the Philippines

The Bank of Nova Scotia
9th Floor, Solidbank Building
777 Paseo de Roxas
Makati, Metro Manilla 1200
Telephone: (632) 817-9751
Facsimile: (632) 817-8796

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READER EVALUATION

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by facsimile at (613) 943-8820. Thank you for your valuable input.

1. How did you obtain a copy of this market report?

- InfoCentre FaxLink system Government worldwide web site
 InfoCentre help line InfoCentre bulletin board system
 Local government office Other: _____

2. How would you describe this market report?

| | Strongly agree | Agree | No opinion | Disagree | Strongly disagree |
|----------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Useful | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Complete | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Well organized | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Well written | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ideal length | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

3. In what form do you prefer to obtain these reports?

- Print Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.

- Seek an agent/distributor Contact Canadian trade office abroad
 Visit the market Participate in a trade show abroad
 Do more research Nothing
 Other: _____

5. What other market reports would be of benefit to your organization? Please identify specific products and countries.

6. Which of the following categories best describes your organization? Check one only.

- Processor/manufacturer Government
 Trading house Student/academia
 Export service provider Consultant
 Industry/trade association Other: _____

7. What were your organization's total sales last year, in Canadian dollars?

- Less than 10 million 10 million to 50 million
 More than 50 million Not applicable

Additional comments/suggestions for improvement: _____

OPTIONAL — The name of your organization is: _____

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