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The Fresh Fruit and Vegetable Market in the Philippines

September 1998

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and International Trade

Ministère des Affaires étrangères
et du Commerce international

Canada

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THE FRESH FRUIT AND VEGETABLE MARKET IN THE PHILIPPINES



EXECUTIVE SUMMARY

This report examines the market for fresh fruits and vegetables in the Philippines. The information contained in this report was drawn primarily from secondary sources and the Canadian Embassy in Manila.

The Philippine agricultural sector is modernizing rapidly. However, the industry as a whole continues to be made up of primarily small family farms, with most rural homes producing fresh fruits and vegetables for home consumption.

The agricultural import market has experienced growth rates of 7% annually throughout the 1990's, and is forecast to continue into the year 2000. Market growth can be attributed to growing disposable incomes, changes in Filipino diets, and the current focus of the Filipino agricultural industry.

The Filipino agricultural industry is focused on fruit and vegetable production for export, not the supply of the domestic market. This has increased the Philippines' dependence on imports. The Philippines imported roughly US\$500 million worth of fresh fruits and vegetables in 1996.

The Philippines reliance on fresh fruit and vegetable imports underscores export opportunities for Canadian companies to supply the country's growing urban population. Apples and grapes are quickly being incorporated into daily diets, and a number of vegetables, including roots and tubers, are growing in popularity because of the increased exposure supermarkets, restaurants, and hotels provide.

Canadian exports comprised 2% of Filipino fresh fruit and vegetable imports in 1997. Canada has traditionally supplied a large portion of the Philippines fresh apple imports, and in 1997, Canada began limited shipments of potatoes along with over US\$2 million worth of other fresh vegetables.

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THE FRESH FRUIT AND VEGETABLE MARKET IN THE PHILIPPINES



MARKET OVERVIEW

A majority of the Filipino population lives in rural regions, and is involved in the agricultural economy. However, urban centres are growing quickly as the Philippines gradually shifts from an agriculturally based economy to an urban-based modern industrial economy. Urban residence currently accounts for 45% of the Philippine population, but as migration patterns continue to favour urban centres, urban growth will continue to outpace that of total population. Metro Manila is the economic centre of the Philippines and offers the greatest potential for most imports. Manila accounts for 70% of the national consumer base - a demographic which ensures the greatest concentration of supermarkets and department stores. Furthermore Canadian exporters should target their products at the growing middle and upper income population segment, as analysts expect this group will experience the greatest increases in disposable incomes in the coming years.

Despite economic shifts, agriculture continues to be central to the Philippine economy, accounting for 25%

of the Philippines GDP and employing nearly 50% of the labour force. However, production methods are low yield and labour intensive. The Filipino government is investing significant resources in order to modernize and improve the agricultural industry. The government's current focus is on increasing corn and rice production, which account for 60% of the Philippines national agricultural production.

The value of Philippine agricultural production in 1996 was US\$6 billion, US\$3 billion of which was accounted for by a variety of fresh fruit and vegetable crops. Beyond rice and corn production, the Philippine agricultural industry is focussed on meeting export commitments - not supplying the domestic market. This policy is supported by the Filipino government which provided assistance to farmers in the production of exportable crops, particularly mangoes, bananas, and coconuts.

The Filipino food market is projected to grow by 4.5% to 5.5% annually over the next six years. However, the fact that the population of the Philippines is growing 2.4% faster than growth in food production has already led to shortages in staple goods. These shortages have caused demand for temperate climate produce to increase rapidly since the Philippine government began reducing trade barriers.

Philippine Fresh Vegetable Imports by Product, 1992-1996 (in US '000)

	1992	1993	1994	1995	1996
Cabbage	82	127	222	344	266
Edible Roots	12	25	115	151	138
Mushrooms	13	19	105	75	84
Potatoes	0	1	194	152	54
Other Vegetables	579	785	1,747	1,770	2,629
Total	686	957	2,383	2,492	3,171

Source: *International Trade databank, SITC codes Revision 3, 0545, 0541, 05453, 05455, 05458, 1998.*

In 1996, the Philippines imported approximately US\$1.5 billion in agricultural products, the majority of which were corn and rice. Fruits and vegetables accounted for US\$45 million, which despite marking a 400% increase over 1992 levels, comprise only 7% of total sector value. While 1996 vegetable imports totalled US\$3 million fresh fruit imports reached US\$40 million - a 40% increase over 1992 levels (in current dollar values).

Philippine Fresh Fruit Imports by Product, 1992-1996 (in US '000)

	1992	1993	1995	1995	1996
Tomatoes	2	5	5	3	46
Pears	267	429	813	624	2,589
Stone Fruit	120	49	205	253	223
Grapes	7,474	7,169	8,830	10,390	14,233
Apples	9,039	12,929	19,642	22,360	22,952
Berries	17	36	217	169	103
Total	16,919	20,617	29,712	33,799	40,146

Source: *International Trade Databank, SITC codes Revision 3, 0574, 05751, 05793, 05794, 0544, 05792, 05794, 1998.*

Canadian exports of potatoes, grapes, and tomatoes have grown significantly 1996, but apples continue to provide the majority of exports.

Key factors shaping market growth

Government economic policies which are attempting to boost Filipino agricultural exports have had an impact on the domestic food market. Strong export demand for Philippine fruit and vegetables elsewhere in Asia has inflated prices in the Philippines, giving imported fruit a significant price advantage despite high tariffs and shipment costs. The government continues to support the agricultural industries focus on exportable goods, and industry experts believe the Philippines will grow increasingly reliant on imported produce over the long-term.

The Westernization of Filipino dietary habits, combined with food shortages and an ever-increasing population have made the market for temperate produce very promising. Increased market presence and consumer awareness will greatly benefit sales of imported products.

Despite the recent economic crisis, prices for most imported fruits and vegetables have remained steady. In fact, food sales in the Philippines are rarely affected by economic fluctuations.

Optimism for growth must be tempered by the destabilisation caused by regional difficulties. There are reoccurring political and socio-economic difficulties in the Philippines which are effecting the economies of certain regions. Recent incidence of unrest in the southern Philippines between government and separatist Muslim forces as well as simple banditry has impeded an economic recovery in the region.

Opportunities

Apples are the major fruit imports, and with increased exposure, is expected to become a staple of most Filipino diets. The preferred variety of apple in the Philippines are red delicious, accounting for 90% of apple imports.

Most temperate climate produce has excellent potential in the Filipino market. For example, industry experts believe that a key developing market will be in the potato sub-sector, which may prove a popular substitute for rice and corn during the anticipated rice shortages in the next five to ten years. However, all imported products have shown considerable growth due to their increased availability.

There is considerable opportunity in a number of retail venues. Many retailers are developing distribution channels for direct imports. This combined with reduced tariffs, may lead to significantly less bureaucratic delays for exporters to overcome.

Actual and planned projects

The Filipino government is currently supporting a policy which increases Philippine dependence on certain agricultural imports while minimizing their need for others. The government has instituted a number of plans, such as "Gintong Ani" (meaning Golden Harvest in the vernacular), which are designed to increase agricultural yields through new crop hybrids, improved irrigation, fertilization, and integrated pest management techniques. These plans generally involve the production of rice and corn, but the government is also interested in increasing the production of other commercial crops. These policies will be beneficial to Canadian exporters as the government is limiting rice imports, and increasing imports of temperate produce.

Critics of these plans argue that they are affecting the prices of most domestically produced agricultural goods. The increased use of fertilizers and pesticides, as well as other attempts to rapidly modernize the agricultural industry have dramatically raised production costs and increased the reliance on imported products. These factors have negatively affected the competitive position of many farms in the domestic market by further amplifying the advantage enjoyed by foreign suppliers.

The Philippine Board of Investment approved a number of infrastructure improvement projects, including a plan to upgrade cold storage facilities for the agricultural industry. The lack of cold storage facilities has been one of the greatest impediments to the distribution of imported produce.

COMPETITIVE ENVIRONMENT

Local capabilities

Filipino farms are generally smaller than 10 hectares, and most agricultural land is located on two islands, Luzon and Mindanao where the majority of the Philippines' domestic industry focuses on corn and rice production.

There has been a notable shift in Philippine agricultural production in recent years. The potential profit for exportable crops has spurred Philippine farmers to focus their production toward that end.

The Philippines is a world leader in fruit and vegetable production, particularly pineapples, mangos, and coconuts. Modern production methods are relatively new to the Philippines, crop failures are common. Only one agricultural region in the Philippines is not susceptible to Typhoons, and most areas are effected by heavy rains.

With the absence of weather-induced crop failures in 1996, agricultural output grew by 3.9%, the highest figure in 15 years. Experts predict that output will continue to grow by 2.5% annually through the year 2000.

International competition

The United States is a major supplier of fresh fruit and vegetables to the Filipino market, comprises 40% of the Philippines' apple imports and 80% of its grape imports. Australia has also become an important supplier of both fresh fruit and vegetables. With the removal of trade barriers, substantial amounts of off-season produce imports originate in Chile, such as grapes. However, product origin is often difficult to ascertain as much of the Philippines' imported produce is transhipped through Hong Kong and Taiwan.

Multinational corporations, such as Dole, Nestle, and Del Monte have a strong market presence, and control a number of segments of the Filipino agricultural industry. Most multinationals control large local farms which, in turn, supply their production needs. However, these corporations are predominately interested in supplying the Philippines canned good market.

Canadian position

Canada exported US\$7.8 million worth of fresh fruits and vegetables to the Philippines in 1997. Although more than US\$5 million of total imports consisted of fresh fruit, this marked a 36% decline over 1996 levels. Vegetable imports totalled US\$2.5 million in 1997, a 136% increase over the previous year.

Canada exported US\$5 million worth of fresh apples in 1996, comprising nearly 25% of the imported apple market. Canadian potato exports tripled in 1995, and accounted for 5% of Filipino imports. The Philippines have a small, but growing domestic tomato market which is reliant on imports. Canada supplied over 90% of tomato imports in 1996.

Canadian Exports of Fresh Fruits and Vegetables to the Philippines, 1995-1997 (US\$ '000)

	1995	1996	1997
Vegetables	2462	1123	2596
Fruit	5275	8177	5233
Total	7737	9300	7829

Source: *Global Trade Information Services*, 1998.

Canning facilities in the Philippines are beginning to import products to supply the domestic market, and could become valuable consumers of imported fruits and vegetables in their attempt to compete with foreign canned goods.

Competitive advantage through Canadian government policies and initiatives

Canada's Export Development Corporation (EDC) can provide loans to exporters with a number of Filipino banks on a shipment-to-shipment basis. EDC loans can assist Canadian exporters in selling goods and services in the Philippines by offering secure prearranged financing terms, which may be a factor given the recent currency crisis in Asia. The offer of an secured EDC loan will aid in acquiring financing in the Philippines from banks who may be fearful of providing small business loans during a debt crisis.

The EDC also works in partnership with Northstar Trade Finance Inc. on smaller shipments for exporter protection against buyer non-payment. Exporters may also wish to seek information from Program for Export Market Development (PEMD), the Canadian Commercial Corporation (CCC), and Agri-Food Trade 2000. These organizations are involved in on going projects in the region, and may be able to assist in smaller transactions.

PRIVATE SECTOR CUSTOMERS

There are a number of private sector customers for fresh fruit and vegetable imports in the Philippines, and can be supplied through a number of methods, often without the use of an agent or distributor.

There are 42 supermarkets in the Philippine Association of Supermarkets, Inc. in Manila. A majority of these outlets rely on distributors, however, some large chains have begun importing products directly.

Top quality hotels and restaurants offer varied international cuisine and rely on various imported fruits and vegetables. In fact, with almost 50 hotels registered with the Department of Tourism in the Philippines', hotels and restaurants have become an important channel for most imported food products. However, lower priced restaurants and fast food chains generally rely on domestic produce.

Consumers are highly price-oriented in the Philippines, and while quality is a factor in most purchase decisions, Filipino's do not have the luxury of purchasing premium products. Moreover, quality and appearance play a role in product selection. For example, in the sale of apples, large apples with good appearance garner considerably higher prices.

PUBLIC SECTOR CUSTOMERS

Government organizations

There are a number of government institutions involved in the importation of food and beverages into the Philippines. The central bank of the Philippines, Bangko Sentral ng Philipina (BSNP), is responsible for the approval of foreign loans for the importation of products. In addition the BSNP provides commodity classification information with the Bureau of Export Trade Promotion in the Department of Trade and Industry.

The Bureau of Food and Drug (under the Department of Health) and the Bureau of Plant Industry (under the Department of Health), have played a major role in regulating and standardizing the agriculture and food industry, and continue to require product registry for imported food, or import permits for phytosanitary reasons.

Government procurement regulations

The National Food Authority is the Philippines food procurement and distribution organization. This organizations primary function is the purchase of rice to meet the demands of the Philippine market. In most cases government procurement guidelines favour Philippine over foreign controlled firms. The role of the National Food Authority in Foodgrain importation has recently been limited to emergency situations,

and there are moves to further liberalize this function to the private sector.

MARKET LOGISTICS

The distribution system in the Philippines is decentralized, as the country is comprised of 7100 islands, making physical distribution complicated and expensive. In fact, the costs associated with distribution have left the majority of the Philippines cities under-supplied.

Transportation and storage facilities outside of urban centres can provide difficulties for fresh fruit and vegetables. The Philippines suffers from a lack of sufficient

post-harvest storage, handling, and transportation facilities.

Channels of distribution

Distribution networks for most imported fresh fruit and vegetable are centralized in urban areas. A new system of distribution is developing around the large supermarket, hotel and restaurant chains of Metro Manila. Corner stores, and open-air wet-markets, play a vital role in Philippine retail. Wet-markets tend to specialize in the sale of fresh fruit and vegetables.

The proliferation of supermarkets is particularly notable, as operations expand by an average 15% annually, and sales increase by 25% annually.

To better meet daily requirements, a number of large Filipino hotel and supermarket chains have begun to directly import fresh fruit and vegetables. Supermarkets, such as Uniwide Sales, SM Supermarket, and Rustan's Supermarkets, import directly to meet consumer demands and improve profit margins. Hotels and restaurants serving the tourist trade also purchase significant amounts of fresh produce. However, these establishments are not subject to the same strict import restrictions as non-tourist establishments, so they are importing directly to ensure a reliable, quality supply of fresh produce.

Direct sales

Direct marketing and sales by most retail outlets are restricted to 100% Filipino-owned businesses. However, foreign firms can engage in wholesale activities and sell directly to distributors, which is useful in the supply of niche markets, such as restaurants and supermarkets in rural areas.

Distributors and wholesalers

Fresh Fruits and vegetables are most often received by importers in the Philippines who in turn, distribute directly to supermarkets, wholesalers and other small retailers. Most supermarkets continue to source their requirements from distributors. Distributors have varying degrees of market coverage, (some distribute only to Metro Manila, whereas others service provincial commercial centres), therefore, soliciting the services of more than one distributor may be necessary.

Agents and sales representatives

Any properly registered Philippine entity can import agricultural products with the required health certificates. To document an agent's credibility Canadian companies should confirm that the agent is registered with the Philippine Securities and Exchange Commission.

Market Entry Considerations

The Philippines has taken several steps recently to reduce bureaucratic regulations, but to do business in the Philippines, one must still overcome substantial bureaucratic red tape. Also, facilitation money may be demanded to expedite paper work, issue permits or other documents, and to reduce taxes or fees owed.

A market is developing for the illegal importation of goods into the Philippines. The government believes the problem is widespread due to the lack of government resources needed to patrol the Filipino coastline for smugglers.

Because of possible layovers and unforeseen delays, pilfering may be a problem for some products. Sending shipments with an additional 10% worth of product will ensure that all shipments' weights and values are precise, and may prove useful in accelerating the distribution process if any unforeseen delays or costs are incurred.

Suggested business practices

Conducting business in a country with cultural and economic differences can be both challenging and rewarding. The Philippines' status as a developing country presents unique obstacles and opportunities that Canadians may be unfamiliar with.

On the surface, local practices are similar to those in Canada. Personal relations and trust are very important in the Philippines, making the initial stages of a business relationship vital. Below the surface, there are many differences in doing business in the Philippines. Opportunities may appear which promise to expedite the export process through facilitation money or alternative avenues of market entry. However, companies who expect to be in the country for the longer-term, it is recommended that they establish relations with reputable and trustworthy local business partners or representatives.

"Working with a Filipino Partner", produced by the Canadian Foreign Service Institute Centre for Intercultural Learning, is one in a series of guides designed to help Canadians and Asians work together effectively. It discusses topics such as communication, social conventions and protocol. For more information contact:

Centre for Intercultural Learning\Canadian Foreign Service Institute
15 Bison Street
Hull, Quebec
J8Y 5M2
Facsimile: (819) 997-5409

Import regulations

The contract of SGS (Société Générale de Surveillance) with the Philippine government for import valuation and inspection, which was to have expired on March 31st, 1998, has been extended until December 31st, 1999. Under the new contract, most importations (particularly agriculture and agrifood items) will no longer be subject to mandatory pre-shipment inspection which had been the source of most complaints in the past because of arbitrarily-set commodity values and shipment delays. In lieu of inspecting the goods at the port exportation for Philippine bound goods, the Philippine Bureau of Customs and SGS will rely on a computerized database on values, classification, and intelligence to ascertain the risks associated with the shipments in the insurance of a Clean Report of Findings (CRF). Exporters are therefore advised to correctly describe in the proforma invoice or other pertinent shipping documents the commodities being shipped, if possible identifying the most detailed and specific commodity classification of tariff heading covering the subject item. This would facilitate a smoother valuation and classification process by the Philippine Bureau of Customs upon shipment arrival. It has been further indicated that the option for voluntary pre-shipment inspection remains at the discretion of the importer, especially if they wish to avail of the quick release procedures at the port of entry.

Exporters should be aware that the Filipino government has previously prohibited fruit exports due to the presence of fruit flies during inspection. Previously banned vegetables are now allowed entry into the Philippines, the ensuing phytosanitary protocols could delay entry for some time. Fresh fruits and vegetables are subject to a tariff of 20%, down from 50% prior to 1998. The government intends to reduce tariffs on all products, including fruits and vegetables, to 5% on all products by 2004.

The Philippine government has instated a temporary tariff valuation system based on an average export value (referred to as the Brussels definition). This system will be in place until the year 2000, at which time the government has legislated a more common transaction value system of tariff assessment.

Local standards, certificates or registrations

Due to phytosanitary concerns, the Philippine Government requires import permits for all fresh produce. The Bureau of Plant Industry (BPI) issues these permits, and establishes protocols for fresh produce, such as those in place for apples, grapes, onions, and potatoes. Many importers have commented that despite established protocols, they still experience difficulties gaining phytosanitary clearance for some agricultural products. Protocols are also under development for berries and a variety of green vegetables which should facilitate their future market access.

Fresh fruits and vegetables are classified as a group 2 product under the Philippines category of product registration. Product registration is based upon an appropriate certificate of analysis from the country of origin or from a BFAD recognized laboratory. Products must comply with Codex standards for prepackaged labelling and BFAD labelling rules and regulations. Also the BFAD must examine the product to verify conformity to prescribed standards for safety and quality. Philippine product registration regulations will make an import agent necessary because the registration process is reliant on information provided by both a domestically based agent and the foreign supplier.

All shipments to the Philippines, regardless of their value, are to be covered by a commercial invoice; bill of lading; certificate of origin; packing list; and various special certificates required (i.e. a Declaration of Food and Drug Products).

Fresh fruit and vegetables require Quarantine clearance which serves as an import license prior to export to the Philippines. The freighter container number and corresponding seal number should be listed on quarantine clearance related certificates. Containers should remain unopened/sealed upon arrival at a Philippine port of entry. BPI also conducts random checks on imported produce, and may require precautionary fumigation or re-exportation if containers do not meet requirements.

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:
 - Brand and name of article being shipped;
 - Name and address of manufacturer;
 - Date of departure or carrying vessel from country; port of exportation; as well as port of entry in the Philippines;
 - Cost of packaging;
 - Inland freight;
 - Other charges, excluding authentication fees.

A special declaration should be attached to the invoice (in triplicate) and visaed to 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
- Preshipment inspection form from the Société Générale de Surveillance.

Documents that require authentication, such as certificates of free sale in the country of origin and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. At that point, documents can be authenticated, at no cost to the exporter, by sending them to:

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

Export credit risks, restrictions on letters of credit or currency controls

The affects of the recent currency crisis should be taken into consideration when planning a partnership or joint venture in the Philippines. Filipino banks are reporting increased difficulties in getting loans repaid because the national economy is still fragile, and while this has not affected produce sales it may have affected the financial stability of many distributors and retailers.

The Bangkok Sentral ng Philipinas (BSNP) continues to regulate foreign borrowing as a means of controlling the foreign debt load, and is responsible for the approval of certain loans. Venture-capital corporations and banks cater to small-medium-sized companies. There are no barriers to full and immediate repatriation of capital and remittances of profit for registered foreign investment. Filipino banks are able to provide foreign exchange, although there are reports of foreign exchange delays of two months. However, relaxation of current controls is expected to improve the situation over the long-term.

PROMOTIONAL EVENTS

Event / Description

Agriculture Asia

Manila, Philippines

March 1999

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Manila, Philippines

August 1998

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FORBES - International Food and Beverage Fair

Manila, Philippines

February 1999

Philippine Centre for International Trade Exhibitions,

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Telephone: 2 8320304

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Food & Hotel Philippines

Manila, Philippines

February 1999

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Makati City, Metro Manila, Philippines 1200

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td.manil@manil01.x400.gc.ca

Canadian Export Development Corporation

151 O'Connor Street
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 Telephone: (613) 598-2500
 Facsimile: (613) 598-2503

Department of Foreign Affairs and International Trade

International Market Intelligence
 InfoCentre 1-800-267-8376

Canadian International Development Agency

Business Cooperation Branch, Bureau for Asia
 200 Promenade du Portage
 Hull, QC K1A 0G4
 Telephone: (819) 997-7901
 Facsimile: (819) 953-5024

Canadian Commercial Corporation (CCC)

50 O'Connor Street, 11th Floor
 Ottawa, ON K1A 0S6
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 Facsimile: (613) 995-2121
 Export Contract advice and assistance
 1-800-748-8191

NORTHSTAR, Trade Finance Inc.
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Facsimile: (632) 890-4716

Insurance Commission

1071 United Nations Ave.
Manila
Telephone: (2) 583-534
Facsimile: (522)-1434

Philippine Economic Zone Authority

4th Fl., Legaspi Towers 300
Roxas Blvd.
Metro Manila
Telephone: (2) 521-9725
Facsimile: (2) 521-8659

**Department of the Interior
and Local Government**

PNCC Complex
Epifanio de los Santos Ave.,
cor. Reliance St.
Mandaluyong, Metro Manila
Telephone: (2) 622-8115
Facsimile: (2) 631-8830

**Freight Booking and Cargo
Consolidation Center**

Philippine Shippers Council
6th Fl., Filcapital Bldg.
Ayala Ave.
Makati, Metro Manila

National Food Authority

Matimyas Bldg.
E.Rodriguez Bldg.
Quezon City, Metro Manila
Telephone: (2) 712-1719

Tariff Commission

5th Fl.,
Philippine Heart Center East Ave.
Quezon City, Metro Manila
Telephone: (2) 998-106

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

Chamber of International Trade

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

World Trade Centre Metro Manila

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

**Canadian Chamber of Commerce
and Industry**

Ground Fl., InterBank Bldg.
Paseo de Roxas
Makati, Metro Manila
Telephone: (632) 812-8568

**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

APPENDIX C -- FRESH FRUIT AND VEGETABLE IMPORTERS IN THE PHILIPPINES**Bagumbuhay Industrial Corp.**

Contact: Johnny S. Lim
 14 Duhat Road, Potrero, Malabon
 Metro Manila
 Telephone:(632) 992-8208
 Facsimile:(632) 361-2616

Camira Industries Inc.

Contact: Ricardo L. King
 P.O. Box 2981, 5307 S.Spr.Hwy.
 Metro Manila 1269
 Telephone:(632) 812-6788
 Facsimile:(632) 812-6750

Food Spectrum

Contact: Pierric Couderc
 7856 Progreso St.
 Makati
 Telephone:(632) 895-9075
 Facsimile:(632) 881-402

The Triple V Food Services Inc.

Contact: Anna B. Narvasa
 251-253 Shaw Blvd.
 Mandaluyong, Metro Manila
 Telephone:(632) 531-6625
 Facsimile:(632) 531-6625

T.Y. De Leon Enterprises, Inc.

Mr. Ronald C. de Leon
 President
 Unit 214 Dona Pacita Bldg.
 #631 Sto. Cristo, Divisoria
 Manila Philippines
 Phone : (63 2) 243-2488/87/8
 Fax : (63 2) 243-2479

Metro Fruit Corporation

Mr. Jimmy D. Ngo
 President
 Elcano Tower 1
 704 Elcano St.
 Binondo, Manila Philippines
 Phone : 241-9643 or 44

Cebu Johnson

Contact: Eugene A. Lim
 P.O. Box 105, Cebu City 6000
 Est: 1970 Emp: 25
 Telephone: (632) 216-217
 Facsimile:(632) 215-425

Harman Foods

Alfredo Yeo, President
 574 EDSA
 Caloocan City, Metro Manila
 Telephone: (632) 34-7071
 Facsimile:(632) 361-4662

Edward Keller (Phils.), Inc.

Ms. Yvonne Saño
 Department Manager
 Food Industries Dept. - Trading Division
 2723 Pasong Tamo
 Makati City, Metro Manila Philippines 1231
 Phone : 8100201
 Fax : (63 2) 819-3520

Europa Delicatessen & Butcher Shop

Mr. Markus Stern
 Director
 Diplomat Bldg.
 91 F. Ramos Street
 Cebu City, Cebu Philippines
 Phone : (32)2537012/7078/88/
 Fax : (63 32) 253-7074
 EMail : europinc@cebu.pw.net.ph

Magnolia-Nestlé Corporation

Mr. Ramon F. Llanos
 President
 710 Aurora Blvd.
 Quezon City, M.M. Philippines 1100
 Phone : 722-3000
 Fax : (63 2) 721-7465

Link Imports

Contact: Steven Ong
 Rm. 609, Bank of Pl. Condo

Fax : (63 2) 242-7888

Killion Merchandising

Benita Sy, President
40 Orozco St.
Quiapo, Manila
Telephone:(632) 49-6718
Facsimile:(632) 530-1505

Mainland International

Contact: Spolinario Chua
514 Plaja Twr 1175L., Guerrero St.
Ermita, Manila
Telephone:(632) 521-9586
Facsimile:(632) 521-1609

Marine Sales Inc.

Adrian Song, President
17 Brixton St.
Pasig, Metro Manila
Telephone:(632) 631-1771
Facsimile: (632) 633-3481

Royal Subic Duty Free Shops Inc.

Bienvenido Tantoco III, General Manager
Subic Bay Metropolitan Authority
Olongapo, Zambales
Telephone: (63-47) 384-2115
Facsimile: (63-47) 384-2977

Alexanrey Enterprises

Mr. Leonardo Yu
Manager
Rm. 201 Padilla de los Reyes Bldg.
232 Juan Luna St.
Binondo
Manila Philippines
Phone : 2413218/2417179
Facsimile: (63 2) 241-7140

Triple V

Ms. Ma. Anna Narvasa
Senior Vice President
Triple V Corporate Center
251-253 Shaw Blvd.
Mandaluyong City, M.M. Philippines
Phone : 532-2740; 531-6625
Fax : (63 2) 531-6513

Binondo, Manila
Telephone:(632) 499-261
Facsimile: (632) 498-584

Kraft General Foods (Philippines) Inc.,

Mr. Luis F. Alejandro
8378 Dr. A Santos Avenue
Sucat
Paranaque, Metro Manilla
Telephone: (632) 828-5546
Facsimile: (632) 827-1713

Newphil Industrial Trading Co.

Contact: William J. Stone
P.O. Box 1773 MCPO
Makati, Metro Manila 1299
Telephone:(632) 866-308
Facsimile: (632) 815-9160

Subic Bay Free Port Traders

Howard Dee, President
Strata 200 Bldg., Bank Drive
Pasig, Metro Manila
Telephone:(632) 635-6161
Facsimile:(632) 635-4868

Beauchamp Farms

Mr. Philip Cea
President
391 P. Guevarra Avenue
cor. 149 Argonne St.
San Juan, M.M. Philippines 3134
Phone : 704951
Fax : (63 02) 721-0726

Sucac

Paranaque, Metro Manila Philippines
Phone : 828-5546 to 49/82890
Fax : (63 2) 827-1713

Calm Sales International, Inc.

Mr. Edgardo P. Maranan
Chairman/President
Rm. 707, First Bank Bldg.
Nueva cor. Dasmarinas St.
Binondo
Manila, Metro Manila Philippines
Phone : 2413551 or 3144
Fax : (63 02) 241-3344

Del Monte Philippines, Inc.

Mr. James Caufield
 President & General Manager
 Citibank Center Building
 8741 Paseo de Roxas
 Makati City, M.M. Philippines
 Phone : 8107501
 Fax : (63 02) 848-0308

Dole Philippines, Inc.

Mr. Mike O'Brien
 Vice President/General Manager
 14/F BA Lepanto Bldg.
 8747 Paseo de Roxas
 Makati City, M.M. Philippines
 Phone : 8102601
 Fax : (63 2) 818-6914

Uniwid Sales Inc.

Mr. Jimmy Gow
 President
 90 E. Rodriguez Jr. Ave.
 Bgy. Ugong Norte
 Quezon City, M.M. Philippines
 Phone : 634-0950
 Fax : (63 2) 633-7183

Killion Merchandising

Mr. Michael O. Sy
 Operations Manager
 40 Orozco St.
 Quiapo, Manila Philippines
 Phone : 733-8221 to 25
 Fax : (63 2) 733-7036
 EMail : killion@pworld.net.ph

T'Boli Agro-Industrial Development Inc.

Mr. Senen Bacani
 President
 1102A Phil. Stock Exchange Centre
 Exchange Road, Ortigas Center
 Pasig City, M.M. Philippines
 Phone : 6348507 or 08
 Fax : (63 2) 634-8644

Duty Free Philippines

Atty. Faustino Salud
 General Manager
 Fiesta Shopping Center
 Ninoy Aquino Ave.,
 Parañaque, Metro Manila Philippines
 Phone : 552-4222
 Fax : (63 2) 552-3667

Phone : (63 02) 271-0077

Duty Free Shoppers, Inc.

Ms. Beverly C. Abad
 Buyer
 Suite 1905 19/F Centerpoint Condmnm.
 Julia Vargas Cor. Garnet St.
 Ortigas Center
 Pasig City, Metro Manila Philippines
 Phone : 6358869-70
 Fax : (63 2) 633-5593

Otalco Corporation

Mr. J. Victory Dy Sun
 President
 160-170 Santo Domingo St.
 Quezon City, M.M. Philippines
 Phone : 364-5096
 Fax : (63 2) 361-7599

SM Supervalue, Inc.

Mr. Manuel Fong, Jr.
 Managing Director
 118 E. Rodriguez Jr. Ave.
 Bo. Ugong
 Pasig City, M.M. Philippines 1600
 Phone : 671-5896
 Fax : (63 2) 671-5895

Link Import Export Enterprise, Inc.

Mr. Patrick Y. Tong
 Vice President
 420 Urbiztondo Street
 Binondo,
 Manila Philippines 1006
 Phone : 243-1014/1003/0948
 Fax : (63 2) 243-1229

Duty Free Supermarket

Mr. Anthony A. Po
 General Manager
 Fiesta Shopping Complex
 Ninoy Aquino Avenue
 Parañaque, M.M. Philippines
 Phone : 833-3674/831-3892
 Fax : (63 2) 831-3286

Rustan Supermarkets

Ms. Maricar L. Tianco
 Vice President
 Marketing
 Rustan Superstore Bldg.
 Araneta Center, Cubao
 Quezon City, M.M. Philippines
 Phone : 911-2351 to 59
 Fax : (63 2) 438-0342

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OTHER REFERENCE MATERIAL

<http://www.edsa.com.ph>

Search engine for the Philippines, provides news and buisness information.

<http://www.asiarisk.com/phil.html>

Political and economic risk consultancy.

<http://www.neog.com/asianow/links1.html>

Asia-Pacific media links.

<http://folio.lbp/folio.cgi?>

Listing of information bases and Canadian government websites.

<http://exportsource.gc.ca>

Department of Foreign Affairs and International Trade.

<http://www.tradeport.org>

Provides economic information, market reports, and trade regulations.

<http://www.aspac.kpmg.com/asiasphere>

Regional industrial profiles for Asia Pacific.

<http://www.undp.org/tcdc/phil1037.htm>

Philippines bureau of agricultural statistics.

<http://www.mabuhay.com>

Philippines news agency and information provider.

<http://www.abs-cbn.com>

Philippine news and current affairs provider.

<http://www.edc.ca/english/index.html>

Export Development Corporation.

<http://www.asean.or.id>

Asian information provider.

<http://atn-riae.agr.ca>

Agri-Food Trade Service.

<http://asiaonline.net.ph>

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

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

