



Agriculture and
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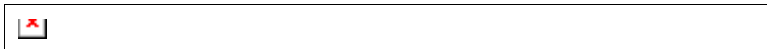


The Pet Food Market in the Philippines

August 1998

*(Également disponible en français sous le titre,
Le marché de la nourriture pour animaux de compagnie aux Philippines)*

Prepared by the
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and the
Canadian Trade Commissioner Service



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exporter.

THE PET FOOD MARKET IN THE PHILIPPINES

 Team
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EXECUTIVE SUMMARY

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

The Philippine pet food market was valued at US\$65 million in 1996, an increase of almost 200% over 1992 (current dollar values). Imports constituted an 8% value share of the pet food market in 1996, but comprised 10% of the Filipino market in sales volume.

The value of the pet food market is projected to increase by 35% by the year 2000. Imports are expected to increase their share of the domestic market because their growth in both sales volume and value continues to outpace that of the pet food market as a whole.

Canada does not currently export pet food to the Philippines. Any Canadian pet food products that reach the Philippines do so through transshipment from regional distributors in Indonesia and Hong Kong.

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THE PET FOOD MARKET IN THE PHILIPPINES



MARKET OVERVIEW

A majority of the Philippines population lives in rural regions, and are involved in agricultural production. However, urban centres are growing quickly as the Philippines gradually shifts from an agrarian-oriented society to a more modern industrial economy. Urban residents currently comprise 45% of the Philippine population, although urban growth exceeds total population as migration to cities has increased.

Metro Manila is the economic centre of the Philippines and the most promising market for most imports. Manila accounts for 70% of the Philippines' consumer markets and thus possesses the largest concentration of supermarkets and department stores. Middle- and upper-classes make up 35% of the Filipino population, and promises to expand as disposable incomes increase.

Although the recent economic crisis in Asia adversely affected the Philippines economy, market fluctuations have had little impact on pet food.

Dog food is the largest segment in the Philippine pet food market. Cat food comprises a very small percentage of the existing pet food market, and short-term growth is projected to be insignificant. Cats are not popular as pets and few companies have introduced a line of cat food to compliment their dog food lines.

The Philippine pet food market presents significant challenges to Canadian pet food producers. The market has little depth due to the relatively recent trend toward adequate pet care.

The Filipino pet food market was valued at US\$65 million in 1996, an increase of 200% over 1992. The market is projected to reach US\$90 million by the year 2000.

Table 1 Philippines Imports of Pet Food, 1992 - 1996
(Values in US'000 and Metric Tonnes)

	1992	1993	1994	1995	1996
US'000	292	518	1,065	1,982	5,140
Metric Tonnes	449	609	1,500	2,531	4,581

Source: International Trade Databank, 1998

Between 1992 and 1996, pet food imports grew by more than 1000% and claimed a significant share of the total market at the expense of domestic producers. In fact, the United States, which supplies over 90% of the imported pet food to the Philippines, saw its January and February 1998 exports match its export totals for all of 1996. Indeed, the January and February exports alone accounted for half of the total US pet food exports for 1997.

Key factors shaping market growth

Growth in the Filipino pet food market will depend heavily on the increasing affluence of consumers. While the recent economic crisis inhibited the growth of the Philippine economy, it is expected that a quick economic recovery will spur greater household incomes will continue to rise. Expansion into new markets will also be a key factor in improving the growth of the pet food market. The market in Metro Manila is increasingly competitive, but opportunities in the under-supplied Visayas and Mindanao regions, along with other major Philippine cities are promising.

Optimism for growth in this sector needs to be tempered by political difficulties in the Philippines which have adversely affected the economies of various regions. Recent violence in the southern Philippines between government and separatist Muslim forces has stunted the region's economic recovery.

Opportunities

There are a number of opportunities for Canadian producers seeking to enter the Philippine market through partnerships or joint ventures. Domestic pet food producers are actively seeking foreign partners to expand and modernize production. These ventures will allow for heightened market intelligence, and increased market access. Foreign firms investing in the development of the domestic industry may also qualify producers for financial incentives from the Filipino government.

The development of the retail supermarket industry in the Philippines may provide opportunities for Canadian producers to supply large chains with private label products. Supermarkets sales may provide Canadian producers with optimum access to Filipino consumers.

Actual and planned projects

The Philippine Board of Investment has begun to approve a number of infrastructure improvement projects, including a plan to upgrade storage facilities for the agricultural industry. These plans will also benefit the national shipping and distribution system which, subsequently, may simplify market access.

COMPETITIVE ENVIRONMENT

Local capabilities

The majority of pet food sold in the Philippines is produced domestically. Filipino producers process pet food from local resources and import bulk supplies for packaging and domestic distribution. Multinational corporations, such as Alpo and Ralston Purina, have entered into joint ventures in the Philippines which have subsequently aided the industry's development.

Processed food producer RFM is the largest producer of pet food in the Philippines with a 20% share of the market.

International competition

The United States is the largest exporter of pet food to the Philippines. In 1996, the United States exported over US\$4.5 million worth pet food to the Philippines, which comprised 92% of the US\$5 million import market. The Philippines' Asian neighbours made up a majority of the remaining import market.

Canadian position

There were no Canadian firms actively exporting pet food directly to the Philippines in 1997. Canada last exported pet food to the Philippines in 1991. The lack of Canadian exports is due to the development of the domestic industry, the introduction of multinationals, and the dominance of American exports. However, Canada does export products to the region which are redistributed to the Philippines. "Dog mate", "Gusto", "Pretty Canny", among others, are exported to Southeast Asia to large pet food distributors, such as "Better Products," for transshipment throughout the region.

Canadian producers planning to enter the Philippine market are advised to seek a partnership or joint venture with a Filipino firm. This is the primary method employed by all but the largest international pet food producers. Partnerships and joint ventures allow Canadian firms market access without restrictive tariffs.

Canadian firms should be aware that competitors have examined the Filipino market closely, and have designed packaging which caters to the preferences of Filipino consumers. Pet food packages generally have enlarged recognizable logos or distinguishable colours, which differs significantly from North American products. Pet food producers must also be cautious that product labels clearly present the product as food for dogs, not food from dogs.

Less than 20% of Filipinos own cars, and large packages make transporting purchases home difficult. As such, large bulk packages of pet food have experienced limited success in the Philippine market.

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.

PRIVATE SECTOR CUSTOMERS

The Philippines is a price oriented market, and while quality will be a factor in most purchase decisions Filipino's do not have the luxury of purchasing premium products. However, consumers have often shown a willingness to purchase their preferred brand regardless of minor price differences price. Most Filipino's consider pet food a luxury, and only a small percentage recognize pet food as a requisite for better health.

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 essential in 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.

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.

There have been difficulties involving the pet food industry and foreign ownership laws. Due to the rice content in some pet food products, pet food producers whose products contain rice or corn have found it difficult to circumvent the Philippines' strict foreign ownership laws. Ralston Purina is currently engaged in a legal battle to maintain full ownership over its Filipino subsidiary. Because their products are made with corn and rice the Filipino government is attempting to force Purina to sell 60% of its subsidiary. Under a 25 year-old decree, foreign entities may engage in the rice and corn industry provided they agree to reduce their ownership to a maximum of 40% after 10 years. This matter is still in dispute, and should be considered for long-term partnerships in the Philippines.

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.

Channels of distribution

The market presence of supermarkets is increasing rapidly, with the number of outlets increasing. This retail venue is increasing its outlets by 15% annually and sales are increasing by 25% annually. Supermarkets have started to import products directly to ensure a constant supply which, subsequently improved the Philippine distribution system.

Convenience stores and open-air markets also play a role in Philippine retail, and they are beginning to carry more imported products. However, these venues carry minimal amounts of pet food, and will not provide many opportunities for market entry.

Direct sales

The Philippine government requires 100% Philippine ownership for companies engaged in direct sales marketing, and the retail industry. are restricted to 100% Filipino owned businesses. However, foreign firms can engage in wholesale activities and sell directly to distributors. This method of sale is useful in the supply of niche markets, and supermarkets.

Distributors and wholesalers

The distribution climate in the Philippines is such that adequate market intelligence will be crucial for successful distribution. Some large retail chains have developed in-house distribution system for imports,

but most other retail venues, such as open-air markets and convenience stores, rely on independent distributors.

Agents and sales representatives

The use of an agent will be imperative to the success of all pet food exports to the Philippines. Agents have the advantage of superior market intelligence and improved communication for customer servicing. Sales representatives will be important in the direct sale of products for exports not willing, or not able to spend significant amounts of time in the Philippines.

Any properly registered Philippine entity can freely import products, provided that they are accompanied by the required health certificates. All local importers of food and beverage products must be licensed with the Bureau of Food and Drugs. Import agents are required to obtain all necessary licenses for product domestic distribution.

Canadian suppliers are encouraged to establish relations with those individuals and companies with a solid understanding of the Philippines' retail sector. It is also important that potential partners have well-established industry contacts.

Market Entry Considerations

There is a large body of evidence that suggests that corruption remains a problem at almost all levels and branches of the Philippine government. As a result, 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

A comprehensive import surveillance scheme requires that all goods imported into the Philippines valued at more than US\$500 be inspected prior to shipment by a representative of Société Générale de Surveillance (SGS). An importer must also check their products commodity classification with the Bangko Sentral ng Philipinas. If the product is unregulated it is freely importable and does not need prior clearance from any government agency.

The Department of Health requires the licensing of all local importers of food items, and the registration of all imported food items with the Bureau of Food and Drug (BFAD). The Department of Agriculture also requires the licensing of all local importers of animal feeds including pet food, and the registration of all imported feed items with the Bureau of Animal Industry (BAI) prior to local distribution.

The dutiable value of imports to the Philippines is based on the "Home Consumption Value" (HCV) system, which is an SGS-determined price at the wholesale level in the exporting country. However, to conform to WTO obligations, the government of the Philippines has committed to replacing HCV with a variation of the Brussels Definition of Value as an interim step to shifting to a transaction-value-based system.

There are no non-tariff barriers in the agricultural industry in the Philippines, except for a quota on rice, corn, and meats, which are not applicable to pet food containing these items. Tariffs on food and beverages has been steadily declining since the early 1990's. The average nominal tariff in the Philippines is 13%, but pet food will be subject to a 30% tariff, in addition to a 10% value-added tax applied on the products' duty paid value. The government plans to reduce agricultural tariffs by the year 2000, with the ultimate goal of a standard 5% tariff on all products by the year 2004.

Local standards, certificates or registrations

Philippine product registration regulations will make an import agent necessary because the registration process is reliant on information provided by a domestically based agent. Pet food is classified as a category 1 product for registration. Importers are required to obtain a License to Operate and submit to BFAD a Foreign Suppliers certificate of Status of Manufacture and a Foreign Agency Agreement both of which should be authenticated by a Philippine Consulate in Canada. A certificate of Product Registration is valid for two years and renewals are valid for three years. Category 1 Products are not subject to laboratory testing, however, random tests may be required at the importers expense.

All labels must include the following in Filipino, or Spanish. In addition, English may be used because 80 to 90% of Filipino's can read english.

- registered trade or brand name;
- registered trademark
- physical or chemical composition
- country of manufacture
- net weight and measure
- address of manufacturer, country of origin
- best before date; and
- if the product is repacked, refilled under license from a principal, the label shall state such facts.

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).

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 sale 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 recent currency crisis should be taken into account when planning a partnership or joint venture facility in the Philippines. The national economy is still fragile, and while this has not affected the processed food industry it may have affected the financial stability of many pet food producers and distributors.

The Bangko Sentral ng Philipinas (BSNP) continues to regulate foreign borrowing in order to regulate the foreign debt load, and certain loans must be approved by the BSNP. Venture-capital corporations and banks cater more readily to small to 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. Currently there are reports of foreign exchange delays of two months, although relaxation of the current controls is expected to improve the situation in the long-term.

PROMOTIONAL EVENTS

Event / Description

FORBES - International Food and Beverage Fair
 Manila, Philippines
 February 1999

Organizer

Philippine Centre for International Trade Exhibitions
 CCP Complex, Rosa Blvd., PO Box 59,
 Manila, Philippines.
 Telephone: 2 8320304
 Facsimile: 2 8323414

Agrilink 98

Manila, Philippines
October 1998

Philippine International Convention Centre

Foundation for Resources Linkage &
Development Inc.
3/F Administration Building, FTI Complex,
Bicutan, Taguig, Metro Manila, Philippines
Telephone: (63 2) 838-4852
Facsimile: (62 2) 838-4573
E-mail: friid@mozcom.com

Food & Hotel Philippines

Manila, Philippines
February 1999

World Trade Centre

PIEC Inc.
9/F PS bank Tower,
Sen. Gil Puyat Avenue
Makati City 1200, Metro Manila
Telephone: (63 2) 759-3229
Facsimile: (63 2) 759-3223

KEY CONTACTS AND SUPPORT SERVICES**PET FOOD IMPORTERS IN THE PHILIPPINES****Duty Free Philippines**

PIRC Bldg., NIA Ave.
Pasay City, Metro Manila
Philippines
Contact: Benjamin Lim, General Manager
Telephone: (632) 832-3191
Facsimile: (632) 832-0120

**Empire of Excellence
International Corp.**

217, Cityland 3 Condo., Herr. St.
1200 Makati City, M.M.
Philippines
Contact: Elisabeth L. Sublay
Telephone: (632) 893-2761
Facsimile: (632) 812-3266

**Royal Subic Duty Free Shops Inc., Subic
Subic Bay Metropolitan Authority**

Olongapo, Zambales
Philippines
Contact: Bienvenido Tantoco III,
General Manager
Telephone: (632) 384-2115
Facsimile: (047) 384-2977

Rustan's Grocery Corp.

Araneta Center, Quezon City
Metro Manila
Philippines
Contact: Bienvenido Tantoco, President
Telephone: (632) 911-2351
Facsimile: (632) 911-0872

Better Products and Technology

19/2 Moo 6, Malaiman Road,
Tambol Wangtaku, Ampor Muang
Nakornpatom 73000
Telephone: (6634) 253883-5, 285205-7
Facsimile: (6634) 253-886
Email: bptpr0@np.a-net.net.th

Subic Bay Free Port Traders

Strata 200 Bldg., Bank Drive
Pasig, Metro Manila
Philippines
Contact: Howard Dee, President
Telephone: (632) 635-6161 to 65
Facsimile: (632) 635-4868

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Canadian Embassy

P.O. Box 2168
Makati Central, Metro Manila
Philippines 1299
Telephone: (632) 810-8861
Facsimile: (632) 810-1699
email: td.manil@manil01.x400.gc.ca
<http://www.dfait-maeci.gc.ca/manila/>

Department of Foreign Affairs and International Trade

Southeast Asia Division (PSE)
125 Sussex Drive
Ottawa K1A 0G2
Telephone: (613) 995-7662
Facsimile: (613) 944-1604

Canadian Export Development Corporation

151 O'Connor Street
Ottawa, ON
K1P 5T9
Telephone: (613) 598-2500
Facsimile: (613) 598-2503

Agriculture and Agri-Food Canada

Sir John Carling Bldg.
930 Carling Ave
Ottawa ON K1A 0C5
Telephone: (613) 759-7637
Facsimile: (613) 759-7503

Department of Foreign Affairs and International Trade

InfoCentre 1-800267-8376

Market Support Division (TCM) Foreign Affairs & International Trade Canada

125 Sussex Dr.
Ottawa, Ontario
K1A 0G2
Telephone: (613) 995-1773
Facsimile: (613) 943-1103

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

Alliance of Manufacturers and Exporters Canada

Canada's leading business network
(613) 238-8888
(416) 798-8000

Canadian Commercial Corporation (CCC)

50 O'Connor Street, 11th Floor
Ottawa, ON K1A 0S6
Telephone: (613) 996-0034
Facsimile: (613) 995-2121

Business Development Bank of Canada

Specialized Financing for Small
and Medium-sized Business
1-888-463-6232

NORTHSTAR, Trade Finance Inc.
(604) 664-5828

Filipino 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

Preshipment Inspection

Societe Generale de Surveillance

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

Philippine Consulate General

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

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

Filipino government offices in The Philippines

Department of Trade and Industry
 Trade and Industry Bldg. 4/F
 385 Sen. Gil J. Puyat Ave.,
 Makati, 3117, Metro Manila
 Telephone:(632) 895-3515
 Facsimile:(632) 895-3513

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

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

Bureau of Product Standards
 Trade and Industry Building
 36 Sen. Gil J. Puyat Avenue
 Makati, Metro Manila 1200
 Philippines
 Postal address:
 P.O. Box 2363 MCPO
 Telephone: (632) 817-5527
 Facsimile: (632) 817-9870
 Telex: 14830 MTI PS

Bangko Sentral ng Pilipinas
 A. Mabini Street Corner Vito Cruz
 Malate, Manila
 Telephone: (632) 524-7011
 Facsimile: (632) 522-3987

Bureau of Export Trade Promotion
 5-8F, New Solid Building
 Sen. Gil J. Puyat Ave.,
 Makati, 3117, Metro Manila
 Telephone: (632) 890-4693
 Facsimile: (632) 890-4716

Bureau of Food and Drugs
 DOH (SVL) Compound
 Alabang, Muntinlupa City
 Metro Manila 1770
 Telephone: (632) 890-4693
 Facsimile: (632) 890-4716

Bureau of Animal Industry
 Chief - Animal Feeds Standards Division
 BAI Compound, Visayas Avenue, Diliman
 Quezon City, Metro Manila, Philippines
 Telephone: (63 2) 924-7951/ 928-2837
 Facsimile: (63 2) 924-7954

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 Manila
 Telephone: (632) 819-7232
 Facsimile: (632) 819-7205

Philippine Canadian Chamber of Commerce

91 Joyce Dale St.
 Marham Ont.
 L3S 3J2
 Telephone: (905) 472-9076
 Facsimile: (905) 472-3924

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

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

Political and economic risk consultancy.

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

Asia-Pacific media links

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

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Department of Foreign Affairs and International Trade, *Canadian and Philippine Contact Directory for International Business Development*, March 1995 (FaxLink 76275).

Department of Foreign Affairs and International Trade, *Overview of the Climate for*

Doing Business in the Philippines, January 1996 (FaxLink 78029).

Dow Jones News Services, *Philippines: RFM Corp. Sees 1998 Net 1B Pesos*, December 1997.

Global trade Information Services, 1998.

International Trade Databank, SITC codes Revision 3, 1998.

<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.mailstation.net/>
LWUA Philippines local water utilities.

<http://www.mabuhay.com>
Philippines news agency and information provider.

<http://www.abs-cbn.com>
Philippines news and current affairs provider.

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: _____

