Required Report: Required - Public Distribution

Date: July 02, 2026

Report Number: RP2026-0018

Report Name: Exporter Guide Annual

Country: Philippines

Post: Manila

Report Category: Exporter Guide

Prepared By: Marie Christine Del Castillo

Approved By: Herpin Rochet Jateng

Report Highlights:

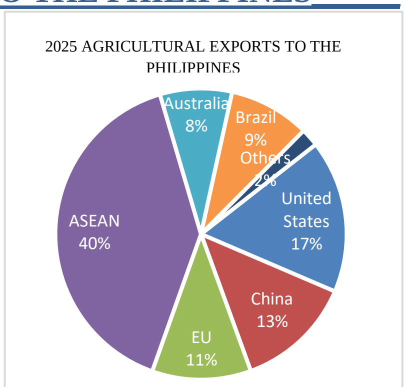
With one of the highest urbanization growth rates in Asia and a growing young working population, the Philippines offers opportunities for U.S. food and beverage exports. A strong and unwavering preference for U.S. products and a powerful affinity for American brands, provides a strong demand despite logistical challenges and high distribution costs in this archipelagic nation. As the top Southeast Asian destination for U.S. consumer-oriented agricultural products, the market provides a strong demand for fruit and vegetable juices, beef and pork products, tree nuts, fresh vegetables and fruits, poultry meat and products, wine and related products, condiments and sauces, dairy products, and processed vegetables products.

MARKET FACT SHEET: PHILIPPINES

The Philippines remains a top-tier market for U.S. agricultural exporters, underpinned by a growing economy, a young and brand-conscious consumer base, and remittance inflows. The Philippines continues to rank as one of the leading Southeast Asian markets for U.S. consumer-oriented agricultural exports.

AG EXPORTS TO THE PHILIPPINES

The Philippines ranked as the 11th largest U.S. agricultural and related products export market in 2025, reaching [$3.44 billion]. The United States remains the largest single-country exporter to the Philippines.



Source: Trade Data Monitor and FAS Research

FOOD PROCESSING SECTOR

Post forecasts a sector growth of 5 percent in 2026 compared to 2025, supported by sustained consumer demand despite rising production costs and elevated prices for imported ingredients.

RETAIL FOOD SECTOR

Post forecasts retail food sales to also grow by 5 percent in 2026 compared to 2025, driven by strong consumer demand, rising remittances, and modern retail expansion, with retailers increasingly adopting omnichannel strategies and private label products to attract price-conscious consumers.

FOOD SERVICE SECTOR

Post forecasts for the food service sector to grow by 10 percent in 2026 versus 2025, fueled by rapid Quick Service Restaurant chain expansion, international brand entry, and strong consumer demand for experiential dining and online delivery for convenience.

Philippines: Quick Facts C.Y. 2026

Demographics

114 million population
0.7 percent population annual growth
44 percent are under 24 years old & median age of 28 years old
56 percent urbanization rate
13 percent reside in Metro Manila (capital city)
80 percent speak English & 93 percent literacy rate

Gross Domestic Product (GDP)

GDP: $525 billion (est) GDP per capita: $4,780 (est)
GDP growth rate: 4% (est) GDP PPP: $1.57 trillion (est)

Agricultural & Related Trade (2025)

World Exports to PH: $20.31 billion
PH Exports to World: $9.22 billion

Consumer-Oriented Agricultural Products:

- Pork, beef, poultry
- Dairy products
- Food preparations
- Sauces and condiments
- Fruits and vegetables
- Biscuits and baked products

Top Fast-Food Chains

Jollibee, Mc Donald's, Chowking, Shakey's, and KFC

Top Supermarkets

SM, Robinson's, Puregold Price Club, Metro Market, Gaisano, and Landmark

Top Convenience Stores

7-Eleven, Alfamart, Uncle John's, All Day, and Lawson

Top Warehouse Clubs

S&R Membership Shopping and Landers

Sources: International Monetary Fund, The World Factbook, U.S. Census Bureau, Trade Data Monitor, The Economist, World Bank, Philippine Statistics Office, Department of Trade and Industry, National Economic and Development Authority, S&P Global-IHS Markit, and Post research

Strengths	Weaknesses
• Strong preference for U.S. ingredients and perceived higher standard and quality.	• Less competitive shipping costs and tariffs than ASEAN, China, and AU-NZ competitors.
Opportunities	**Threats**
• A young, growing working-age population that has a strong affinity to American brands.	• Higher agricultural exports from EU, ASEAN, and Brazil.

Contact: USDA-FAS Manila, U.S. Embassy, Philippines
E-mail: AgManila@usda.gov

SECTION I. MARKET OVERVIEW

Summary

The Philippines is poised to be a thriving market for U.S. food and beverage products. With rapid urbanization, a young workforce that has considerable disposable income, and robust remittances from immigrants and workers abroad, the opportunity for growth is substantial. Although economic performance and remittances are estimated to slow down in 2026 and food price inflation remains elevated, the overall market potential remains robust.

Population and key demographic trends

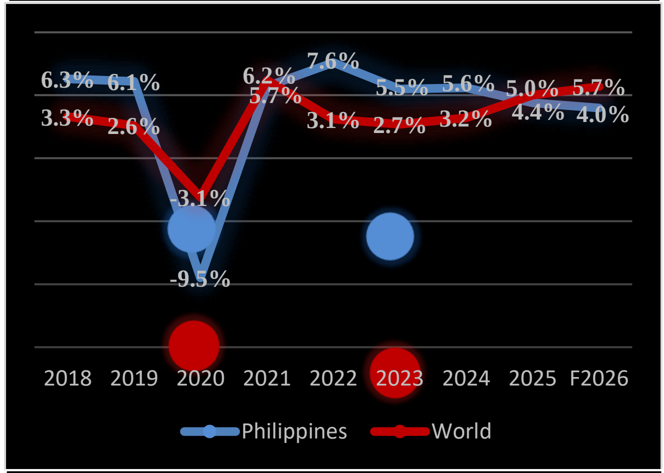
Urbanization in the Philippines is rapidly increasing, with more than half of the population living in cities (Philippine Statistics Authority). People are moving from rural areas to cities, like Metro Manila, Cebu, and Davao, for higher paying jobs and education.

Economy and consumer behavior

The Philippine economy expanded by 4.5 percent year-on-year in Q1 2026 and is expected to sustain growth in 2026 amid moderating domestic demand. The Services and Industry sectors grew at a slower rate of 5.9 percent and 3.1 percent in 2025 respectively. Agricultural, Forestry, and Fishing grew 3.1 percent in 2025 and surpassed full year growth in 2024 due to increased production of crops, poultry, and eggs. Agricultural, seafood, and wood imports grew by 4 percent year-over year, while exports rose by 10 percent over the same period.

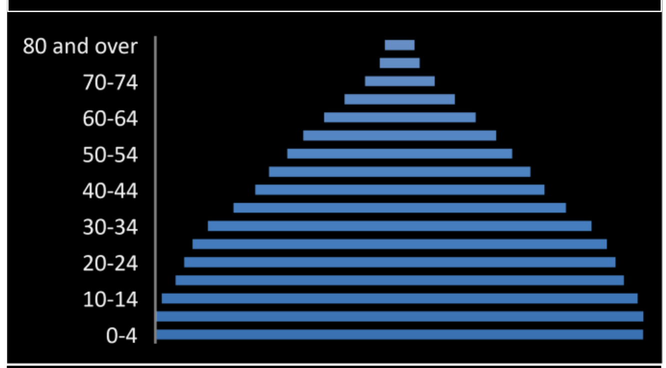
Driven by increasingly cautious consumer behavior, household spending growth slowed to 4.6 percent in 2025 and further to 3 percent in Q1 2026. Spending, however, on food and non-alcoholic beverages remains the largest share

Figure 1. Gross Domestic Product (in percentage growth rate)



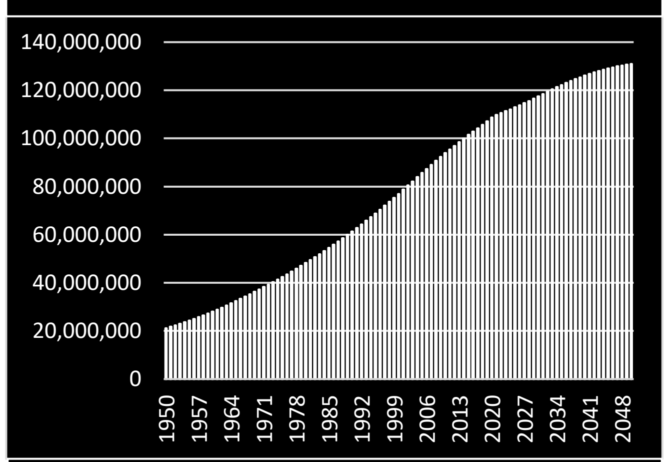
Source: World Bank and Post Research

Figure 2. 2025 Population Pyramid



Source: United States Census Bureau

Figure 3. Projected Population

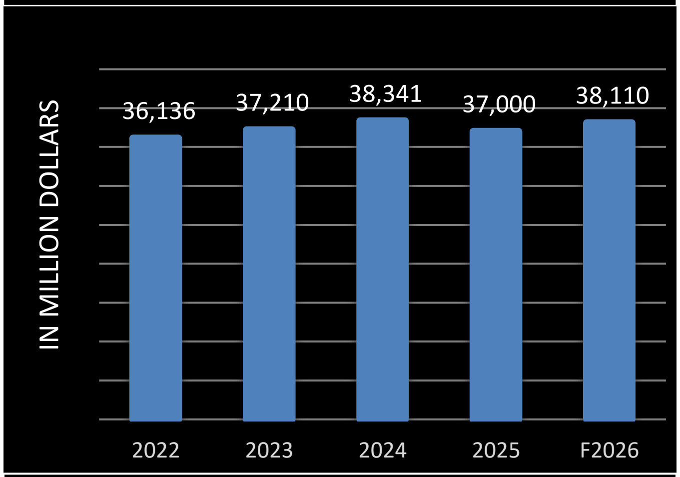


Source: United States Census Bureau

(31.9%) in 2025 and spending on restaurants and hotels grew by 4.2% the same year. Food and beverage prices remain elevated but are expected to ease gradually through the remainder of 2026.

Overseas worker remittances, estimated at $38 billion in 2026 (Bangko Sentral ng Pilipinas), represent 7 percent of the economy and have grown for five consecutive years. Though remittances are still expected to grow 3 percent in 2026 compared to 2025, cash remittance growth slowed to 2 percent year-on-year in April, the weakest pace in three years, reflecting caution among overseas workers amid global challenges and tighter spending. The majority of the overseas workers is based in Saudi Arabia, United Arab Emirates, North and South America, and Europe.

Figure 4. Overseas Filipino Remittances



Source: [Bangko Sentral ng Pilipinas]

Overall Business Climate

The Philippines presents a favorable business climate underpinned by a growing economy, a large and consumer base, and strong affinity for U.S. brands and products. The economy is estimated to grow by 4 percent in 2026 (World Bank), supported by a robust employment rate of 95.3 percent, sustained consumer demand, and government spending growth (18.7 percent in Q1 2026). Inflationary pressures and rising transportation costs are tempering household purchasing power and consumer spending.

Table 1. Advantages and Challenges

ADVANTAGES	CHALLENGES
A young, digitally connected population with high English proficiency and strong affinity for American brands supports sustained demand growth across food service, retail, and e-commerce channels.	U.S. exporters face higher Most-Favored Nation tariffs compared to Asian competitors with preferential trade agreements, reducing price competitiveness.
U.S. products meet the quality and consistency standards that Philippine manufacturers and importers prioritize in purchasing decisions.	Higher logistics costs and longer lead times disadvantage U.S. exporters, compounded by inter-island distribution challenges.
USDA Foreign Agricultural Service, U.S. agricultural trade associations, State Regional Trade Groups, and State Departments of Agriculture, offer trade seminars, buying missions, and trade servicing for support.	Some Philippine buyers rely on U.S. consolidators for small-quantity exports and trial container shipments.
Rising premiumization and health-conscious trends create growing niche opportunities for U.S. exporters of organic, gluten-free, and plant-based products.	Elevated oil prices and peso depreciation are driving up shipping and landed costs, weighing on consumer spending on imported food and beverage products.

SECTION II. EXPORTER BUSINESS TIPS

Table 2. Exporter Business Tips

Utilize U.S. Trade Support: ✓ Access the Philippines Country Commercial Guide for more information on the country's economic environment. ✓ Contact Post to help facilitate trade, provide market information, and promote U.S. products through marketing programs. ✓ USDA-FAS collaborates with more than 70 U.S. agricultural trade associations, State and Regional Trade Groups, and State Departments of Agriculture to support capacity-building and training programs. ✓ Know the market and access annual and market brief reports at USDA Manila.	**Selecting Ports:** ✓ Determine the nearest or preferred port of the buyer. ✓ Avoid shipping during the fourth quarter of the year due to congested ports. ✓ Manila Port receives 80 percent of agricultural exports to the Philippines, and the rest are shipped to Cebu, Davao, Subic, Batangas, Cagayan de Oro, and other ports. ✓ Access the report Connecting Port to Plate Amid Evolving Food Preferences for details. ✓ Access the Bureau of Customs and Philippine Ports Authority for updates.
Contact Buyers: ✓ Connect with major importers, large manufacturers, or key processors with offices in Manila, Cebu, Davao and other major cities. ✓ Contact central purchasing offices of conglomerates, retail supermarket chains, restaurants chains and groups. ✓ Access sectoral reports in USDA Manila for the top food processors, retailers, and restaurants.	**Maintain Trade Support:** ✓ Provide trade support such as trade incentives, technical service, marketing support, especially for new-to-market products. ✓ Provide support for e-commerce to increase online sales and brand awareness of export products. The Philippines regularly tops social media and internet usage global rankings. ✓ Build long-term relationships with importers and frequently visit the market. ✓ Participate in U.S. agricultural trade organizations and Post-led activities and events.
Establish Agreements: ✓ Secure an importer agreement to set expectations and delineate roles and responsibilities prior to shipment. ✓ Access Incoterms for shipment options and guidelines.	**Exhibitions:** ✓ Consult Post to identify the best trade exhibitions for promoting U.S. products in the Philippines. ✓ Access sector reports in USDA Manila for key trade events in retail food, food processing ingredients, and food service.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

New exporters are encouraged to connect with Post and U.S. agricultural trade organizations for market insights and entry guidance. For handling large export volumes, building relationships with agents, distributors, importers, retailer chains, and restaurant groups is essential. For information on import procedures and regulatory requirements, please access the following reports:

- Philippines: Food and Agricultural Import Regulations and Standards Country Report
- Philippines: Food and Agricultural Import Regulations and Standards Export Certificate Report
- Philippines Country Commercial Guide

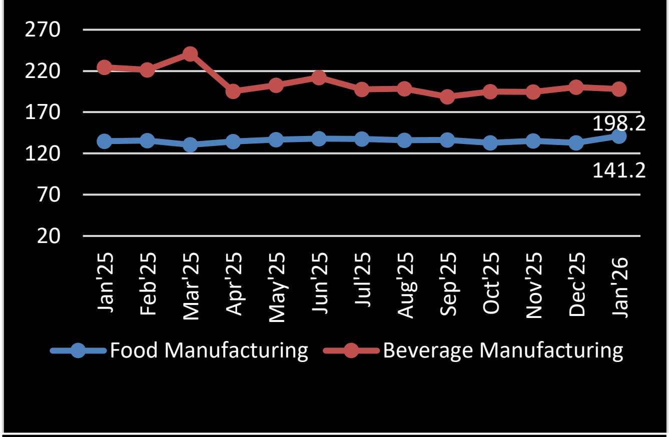
SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

FOOD PROCESSING

Despite inflationary pressures, food and beverage manufacturers' sales are estimated to grow by 5 percent in 2026, driven by strong demand for food and beverage ingredients.

The sector offers strong opportunities for U.S. suppliers of wheat, dairy (skim milk powders, whey protein concentrates, and milk fats), red meat (pork and beef products), poultry, starch, potato (chipping potatoes), soy (textured vegetable protein, soy flour, soy milk powder, and soybean oil,), and corn products, as well as pulses, nuts, oils, sauces (tomato sauce), seasonings, food preparations (soups and broth), processed fruits and vegetables, and sweeteners. Post recommends partnering with a local importer familiar with Philippine regulations and providing training and trade servicing to improve manufacturer efficiency and product quality. See Food Processing Ingredients report for details.

Figure 5. Food and Beverage Manufacturing Sector Value of Net Sales Index (2018=100)



Source: Philippine Statistics Authority

Market Opportunities

- U.S. food ingredients are well-regarded for their quality, consistency, and food safety standards, a key purchasing criterion for Philippine food and beverage manufacturers.
- Exporters can introduce new products, flavors, and healthy food options.

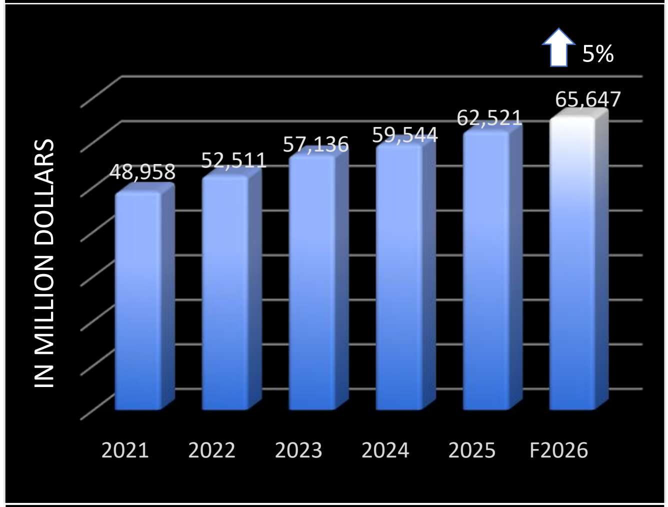
Key Issues

- U.S. suppliers face competition from ASEAN, China, EU, and Brazilian suppliers who benefit from lower tariffs and shorter lead times and offer competitive pricing.

FOOD RETAIL

The Philippine food retail sector is forecast to grow by 5 percent in 2026, fueled by strong consumer demand, an improving labor market, rising remittance income, and the rapid expansion of modern retail stores into rural areas.

Figure 6. Food and Beverage Retail Sales



Source: Euromonitor International and FAS Research

While traditional retailers continue to hold the largest market share, modern retail channels, including convenience stores, supermarkets, hypermarkets, warehouse clubs, and e-commerce platforms, are rapidly reshaping the landscape. Foods e-commerce is the fastest-growing emerging channel. Retailers are increasingly adopting omnichannel strategies and offering promotions, discounts, and private label products to attract more price-conscious consumers.

Key U.S. export opportunities in the food retail sector include meat products, dairy, frozen potatoes, fresh and frozen fruits and vegetables, fruit and vegetable juices, tree nuts, raisins, wines, beverages, cereals, chocolate, candy, tomato sauces and ketchup, seasonings, and pet food, with supply gaps persisting for yogurt, condensed milk, egg products, waffles, and stone fruits. See the latest Retail Foods report for details.

Market Opportunities

- U.S. food and beverage brands consistently outperform competitors in Philippine retail stores, driven by strong consumer preference for American products and their reputation for quality.
- Philippine consumers prefer U.S. frozen beef, pork, and poultry, as well as fresh fruits and vegetables, for their consistent quality and food safety standards.
- U.S. canned meats, soups, sauces, and vegetables are strong retail performers, alongside snacks, chocolates, candy, and confectionery among the top-selling products.
- Retail stores also carry industrial-sized packaging, including dairy products, condiments, sauces, seasonings, and juices, commonly sourced by restaurants, hotels, and catering operations.

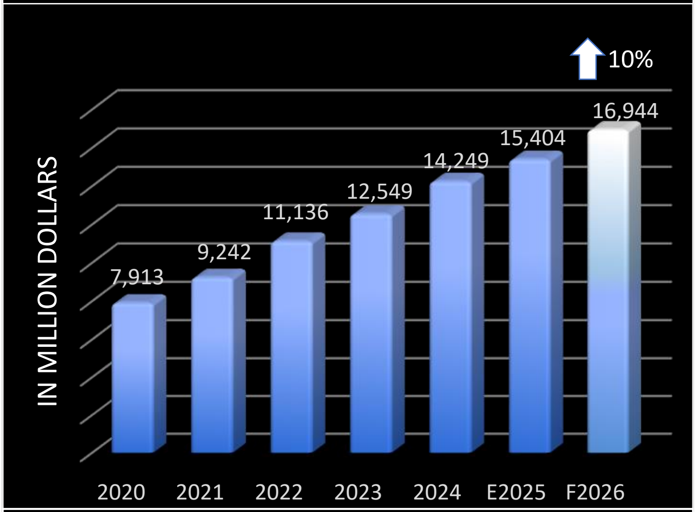
Key Issues

- Most retailers rely on local importers or U.S. consolidators and typically place minimal volume orders for new products.
- To introduce new products or feature them in promotions, retail chains charge high retail listing and promotional fees, increasing the cost of market entry for new-to-market exporters.

FOOD SERVICE

The Philippine food service sector surpassed pre-pandemic outlet numbers with continued growth expected in 2026 versus 2025. This growth is driven by the ongoing expansion of quick service restaurant chains, international brand entry, and sustained consumer demand for dining out and online food delivery.

Figure 7. Consumer Food Service Sales



Source: Euromonitor International and FAS Research

A booming tourism sector is pushing hotels and caterers to full capacity, while restaurant chains generate significant volume orders for chicken leg quarters, mozzarella, and other imported ingredients for fried chicken, pizza, and burger menus. Millennials and Gen Z are driving demand for specialty coffee, innovative beverages, and café experiences, and growing consumer interest in distilled spirits, and wines. Online food delivery further broadens opportunities for U.S. exporters across all food service channels.

For export volumes sufficient to meet container load shipments, FAS Manila recommends connecting with restaurant groups operating stores nationwide, while also engaging smaller but fast-growing chains that present strong long-term potential (i.e., The Bistro Group, Moment Group of Restaurants, Jollibee Foods Corp., Max's Group Inc., Shakey's International Inc., and Yum! Brands Inc. Access the Food Service- Hotel Restaurant Institutional report for more details.

Market Opportunities

- Rise in event bookings drive volume demand for imported ingredients across meat, dairy, sauces, and specialty food categories for hotels, restaurants and catering.
- Growing consumer interest in imported distilled spirits, wines, and specialty beverages.
- High-end restaurants and hotels feature premium U.S. ingredients on their menus, including ribeye, porterhouse, and tenderloin cuts, Kurobuta pork, duck, specialty cheeses, and wines.

Key Issues

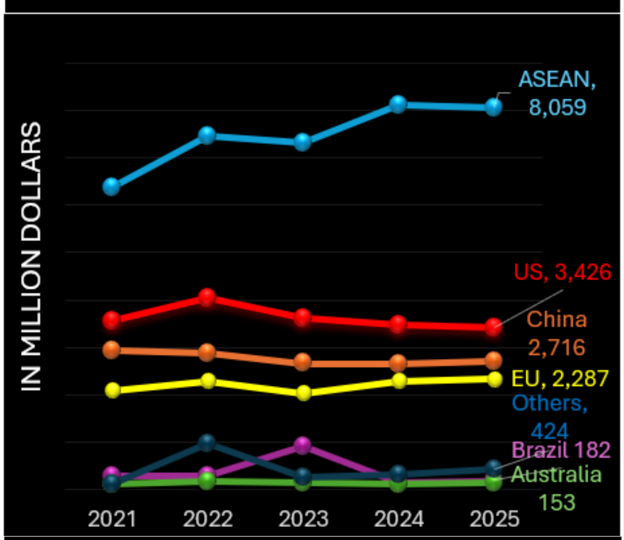
- Most food service establishments source through local importers or consolidators and tend to place small volume orders.
- Price sensitivity among smaller food service operators makes it difficult for U.S. products to compete against lower-cost local and regional alternatives.

SECTION V. AGRICULTURAL AND FOOD IMPORTS

The Philippines is a top market for U.S. agricultural exports in the world: intermediate (top 6), consumer-oriented (top 12), and bulk (top 17). Total U.S. agricultural and related exports to the Philippines declined by 2 percent in 2025, primarily due to lower wheat export prices.

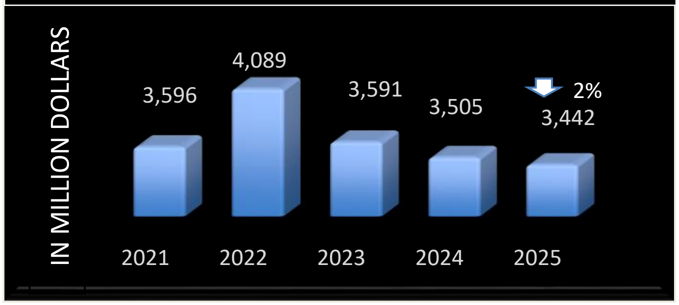
The top U.S. agricultural exports to the Philippines in 2025 were soybean meal ($1,005 million), wheat ($630 million), dairy products ($366 million), poultry ($251 million), ethanol ($192 million), pork ($133 million), beef ($127 million), and processed vegetables ($90 million). Poultry, ethanol, live animals, and other meat products reached record high export sales to the Philippines. Access the U.S. Agricultural & Related Exports to the Philippines 2021-2025 and January-April YTD 2026 for other products.

Figure 8. Agricultural Exports to the Philippines from Key Trading Partners



Source: Trade Data Monitor

Figure 9. U.S. Agricultural and Related Exports to the Philippines



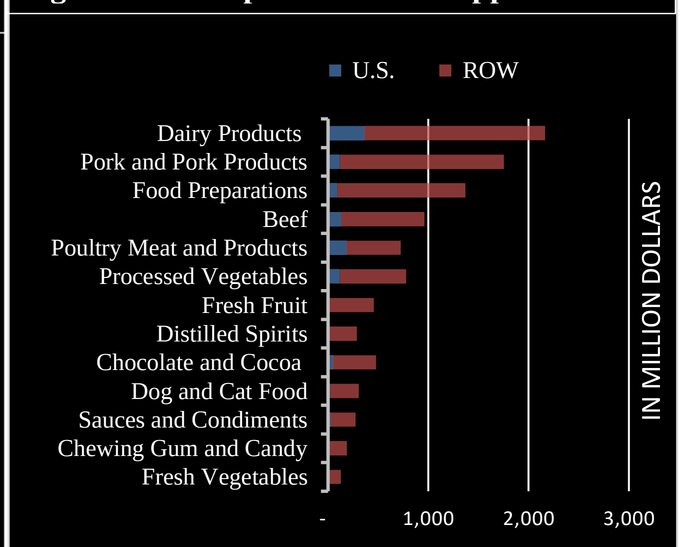
Source: Global Agricultural Trade System

Figure 10. Ranking of U.S. Consumer-oriented Exports to the Philippines

PRODUCT	RANK 1	RANK 2	RANK 3	RANK 4
Soybeans, Fruits and Vegetable Juices, and Wine and Related Products	✔			
Dairy, Poultry, Other Meat Products, Fresh Vegetables, Processed Fruits, and Tree Nuts		✔		
Fresh Fruits, Processed Vegetables, and Distilled Spirits			✔	
Beef, Pork, Condiments and Sauces, and Pulses				✔

Source: Trade Data Monitor

Figure 11. 2025 Top Consumer-oriented Agricultural Exports to the Philippines



Source: Trade Data Monitor

SECTION VI. KEY CONTACTS AND EVENTS

Post, based at the U.S. Embassy in Manila, is ready to assist U.S. exporters, including those introducing new-to-market products, by providing market entry strategies and trade promotion support together with U.S. Agricultural Industry Associations. See below key contacts and events for the Philippines and the broader Asia region:

Table 3. Key Contacts and Events

KEY CONTACTS		
USDA Manila AgManila@usda.gov Tel: (632) 5301-2000	USDA APHIS Manila IS.Manila.Philippines@usda.gov Tel: (632) 5301-2000	Foreign Commercial Service businessphilippines@trade.gov Tel: (632) 5301-4249
Department of Trade and Industry	Department of Agriculture	Food and Drug Administration
Tradeline Philippines	Philippine Chamber of Commerce	American Chamber of Commerce of the Philippines
Anti-Red Tape Authority	Philippine Exporters Confederation, Inc.	Philippine Food Processors and Exporters Organization Inc.
Center for International Trade Expositions and Missions	Philippine Chamber of Food Manufacturers Inc.	Association of Purchasing Managers of Hotels and Restaurants of the Philippines
Hotel and Restaurant Association of the Philippines	Food Caterers Association of the Philippines	Philippine Retailers Association
EVENTS		
Manila Food and Beverage Expo World Trade Center, Manila June 10-14, 2026	World Food Expo SMX Convention Center, Manila July 29-August 1, 2026	Fi Asia Indonesia * Jakarta International Expo, Jakarta, Indonesia September 16-18, 2026
FOODEX Japan* Tokyo Big Sight, Japan March 9-12, 2027	Food and Hospitality Asia* Singapore Expo, Singapore April 20-23, 2027	Seoul Food and Hotel* KINTEX, Seoul, Korea June 8-11, 2027

*USDA Endorsed Trade Show

Attachments:

No Attachments