USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

Voluntary - Public

Date: 7/24/2012

GAIN Report Number:

Philippines

Post: Manila

Philippines - A Top Market for U.S. Foods and Beverages in 2011

Report Categories:

Market Development Reports

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Report Highlights:

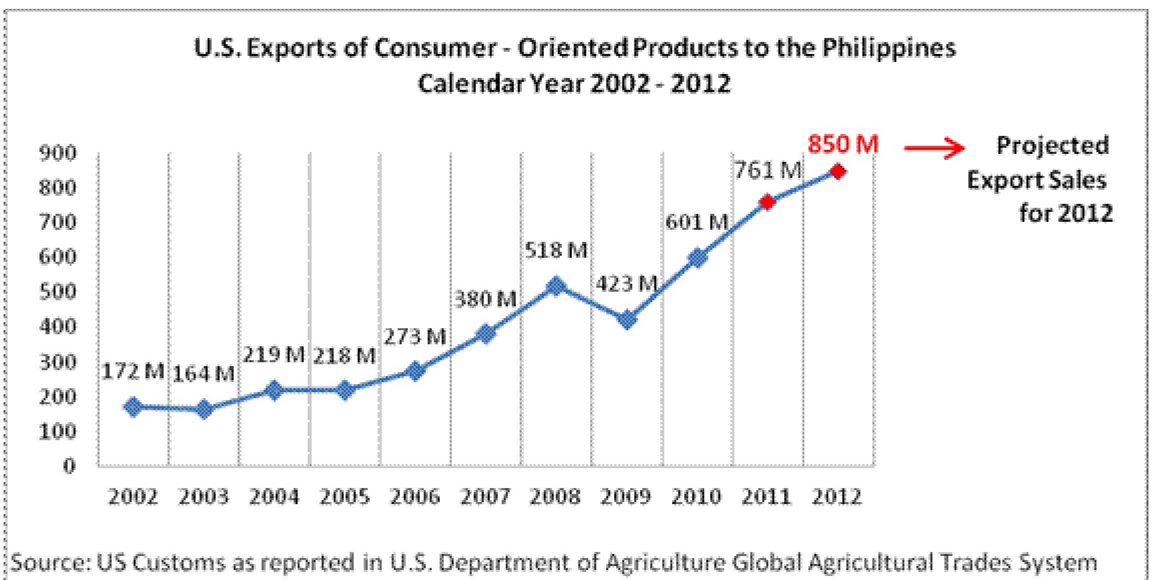
Driven by a rapidly growing middle class and strong reputation for quality, U.S. food and beverage (f&b) exports to the Philippines increased 27 percent in 2011 to a record $761 million. Sales are up 16 percent from January to May 2012 and are expected to reach $850 million by year-end. The Philippines continues to be the largest f&b market in SE Asia and one of the fastest growing markets in the world for this high value, job generating sector. FAS Manila expects the U.S. will remain the Philippines' top supplier of a wide variety of f&b products. More importantly, this healthy export growth is broad-based, with 13 of the 16 items that comprise the f&b category achieving record sales in 2011. Top U.S. exports were dairy products, red meats, poultry meat, snack foods, and processed fruits & vegetables. While sales for all f&b products are expected to remain strong, prospects are especially strong for meat and poultry products, and for products that can be classified as "healthy," "gourmet," and "convenient."

General Information:

Overview

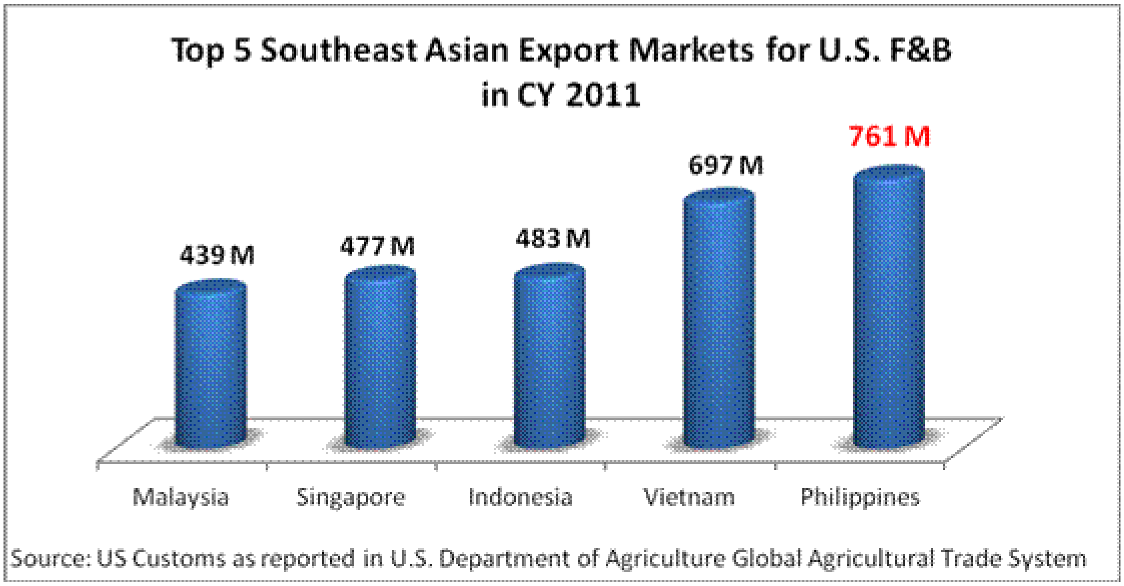
According to U.S. Customs statistics, the Philippines imported $761 million in U.S. food and beverage (f&b) products in 2011, maintaining its longstanding position as the largest U.S. f&b market in SE Asia and one of the fastest growing markets in the world. The robust growth in U.S. f&b sales is driven by a rapidly growing middle class, a strong reputation for quality, and an historical preference for products from the United States. Sales are up 16 percent from January to May 2012 and are expected to reach $850 million by the end of the year. Already up 80% since 2009, U.S. f&b export sales to the Philippines are poised to double within three years, well in advance of the 5-year target set by the White House National Export Initiative.

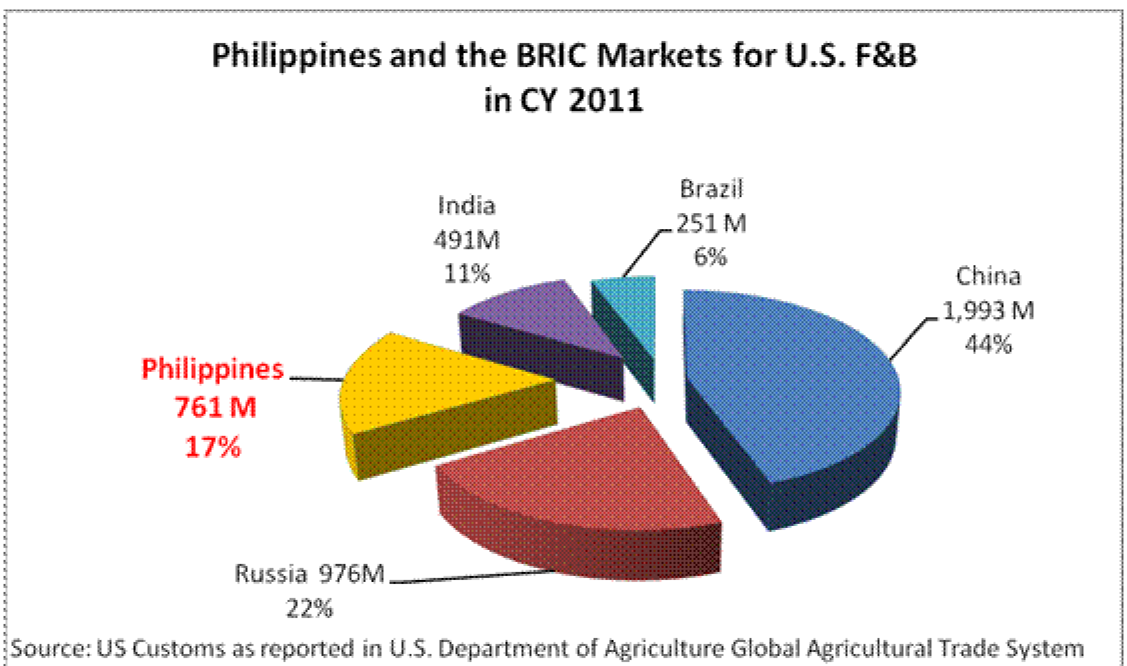
The best news for the U.S. f&b industry is that nearly all the products that comprise this high value, job-generating sector enjoyed strong growth and record sales. Exceptional increases occurred in eggs & products, fresh vegetables, dairy products, poultry meat, and red meats. Traders also report rapid growth for "healthy" foods, though official data is unavailable as U.S. Customs does not track this category as a separate category.



This remarkable growth extends a steady trend of impressive export achievement that has carried through most of the decade. Between 2002 and 2011, U.S. f&b sales grew by almost 350 percent.

The Philippines ranked as the12th largest export market in the world in 2011, filling over 19,000 container trucks and providing support to the roughly 1.8 million American food processing jobs (and many more throughout the supply chain). When compared with the BRIC countries, the Philippines ranks third, following China and Russia. With just 100 million people, the Philippine market for U.S. f&b products is over 50 percent larger than that of India with its one billion in population.





Top Ranking Products and Best Prospects

In 2011, record sales were achieved in 13 of the 16 categories that comprise the f&b category. The top five f&b products in export value were: dairy ($281 million), red meats ($132 million), poultry meats ($70 million), snack food ($65 million) and processed fruits & vegetables ($62 million). Total f&b exports rose nearly 180 percent between 2006 and 2011.

The best prospects for U.S. f&b products are: beef, pork, poultry, dairy and cheese products, processed fruits and vegetables, fresh fruits and vegetables, wine and beer, and snack foods. "Organic", "healthy" and "convenience" foods are also expected to experience especially rapid growth.

TOP TEN PRODUCTS		
By Value	**By Growth**	**By Prospect**
Dairy & Cheese Products	Fresh Vegetables	Red Meats
Red Meats	Red Meats	Poultry Meats
Poultry Meats	Poultry Meats	Dairy & Cheese Products
Snack Foods	Eggs & Products	Frozen Potatoes
Processed Fruits & Vegetables	Dairy & Cheese Products	Other Processed Fruits & Vegetables
Fresh Fruit	Fresh Fruit	Fresh Fruits & Vegetables
Pet Foods	Breakfast Cereals	Wine & Beer
Wine & Beer	Pet Foods	Snack Foods
Fruit & Vegetable Juices	Wine & Beer	Tree Nuts
Fresh Vegetables	Snack Foods	Breakfast Cereals

Note: "Gourmet", "healthy" and "convenience" products are experiencing excellent growth and prospects but are not identified as by individual customs statistics.

U.S. Consumer Oriented Food and Beverage Exports to the Philippines
CY 2006 - 2011 and Year-To-Date Comparisons

Value in Thousands of Dollars

	Calendar Years (Jan-Dec)								January - May		
					Comparison			% Growth	Comparison		
	2006	2007	2008	2009	2010	2011	% Chg	2006-2011	2011	2012	% Chg
Consumer Oriented Total	273,321	380,510	518,837	423,168	601,057	761,189	26.6	178.5	290,117	336,224	15.9
Snack Foods	35,629	41,306	50,464	47,863	50,494	64,745	28.2	81.7	24,689	27,683	12.1
Breakfast Cereals	1,499	2,719	3,121	2,223	3,658	3,849	5.2	156.8	1,392	1,933	38.9
Red Meats,FR/CH/FR	10,742	21,528	64,840	83,442	110,687	103,114	-6.8	859.9	38,302	37,336	-2.5
Red Meats, Prep/ Pres	8,041	10,010	11,897	16,610	23,019	28,987	25.9	260.5	13,054	16,038	22.9
Poultry Meats	14,298	19,978	19,841	39,860	50,326	70,037	39.2	389.8	32,391	34,650	7.0
Dairy Products	95,631	151,984	210,226	76,575	181,533	281,025	54.8	193.9	105,482	137,467	30.3
Eggs & Products	580	506	1,107	1,619	825	1,919	132.6	230.9	805	1,073	33.3
Fresh Fruit	16,159	18,179	23,154	32,787	31,274	41,894	34.0	159.3	7,431	5,015	-32.5
Fresh Vegetables	346	1,301	2,070	1,565	4,364	5,953	36.4	1620.5	2,635	1,785	-32.3
Processed Fruits & Vegetables	41,571	51,621	54,876	36,867	57,223	61,692	7.8	48.4	25,795	28,037	8.7
Fruit & Vegetable Juices	6,223	14,152	10,496	6,719	7,679	7,963	3.7	28.0	2,505	3,359	34.1
Tree Nuts	2,787	2,910	3,723	2,553	4,447	4,538	2.0	62.8	1,864	1,539	-17.4
Wine and Beer	4,247	4,614	7,772	7,423	8,068	8,110	0.5	91.0	3,048	2,455	-19.5
Nursery Products	49	89	19	36	36	84	130.2	71.4	31	0	-100.0
Pet Foods	8,462	10,651	13,487	13,743	16,152	20,024	24.0	136.6	8,725	8,195	-6.1
Other Consumer Oriented	27,056	28,964	41,745	53,283	51,269	57,255	11.7	111.6	21,970	29,657	35.0

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

Note: Highlighted Figures Denote Highest Export Levels Since at Least CY 1970

U.S. Consumer Oriented Food and Beverage Exports to the Philippines
CY 2006 - 2011 and Year-To-Date Comparisons

Volume

		Calendar Years (Jan-Dec)							% Growth	January - May Comparison		
						Comparison						
	UOM	2006	2007	2008	2009	2010	2011	% Chg	2006-2011	2011	2012	% Chg
Consumer Oriented Total	MT	184,335	192,297	239,212	249,999	331,593	355,791	9.7	93.0	122,332	112,568	-8.0
Snack Foods	MT	11,826	11,729	13,553	13,305	11,581	15,299	27.9	29.4	5,842	6,422	9.9
Breakfast Cereals	MT	1,019	1,712	1,825	1,290	2,332	2,365	2.6	132.1	847	1,214	43.4
Red Meats,FR/CH/FR	MT	6,302	11,156	34,539	46,536	58,628	45,937	-27.3	629.0	19,043	14,595	-23.4
Red Meats, Prep/ Pres	MT	3,098	2,927	3,399	4,573	5,804	7,185	30.2	131.9	3,446	3,667	6.4
Poultry Meats	MT	20,830	20,230	16,799	38,902	54,089	72,689	47.8	249.0	33,917	34,320	1.2
Dairy Products	MT	62,594	62,381	70,160	50,455	83,882	84,029	0.3	34.2	36,370	36,830	1.3
Eggs & Products	MT	224	149	217	221	199	612	187.1	173.4	279	280	0.3
Fresh Fruit	MT	13,822	12,940	17,807	25,401	25,906	31,964	23.9	131.3	9,871	6,792	-31.2
Fresh Vegetables	MT	691	3,310	4,177	3,686	8,660	11,565	78.8	1572.7	5,191	3,204	-38.3
Processed Fruit & Vegetables	MT	41,788	44,400	45,676	30,742	46,843	46,281	-1.8	10.8	20,567	19,343	-5.9
Fruit & Vegetable Juices	KL	5,328	5,574	5,070	5,223	5,952	6,247	5.7	17.3	2,148	2,686	25.1
Tree Nuts	MT	482	496	690	511	780	708	-14.2	46.7	294	202	-31.3
Wine and Beer	KL	2,214	2,539	3,106	3,261	3,503	3,480	-0.7	57.2	1,345	959	-28.7
Nursery Products	THNDS	6	32	3	5	2	13	194.3	117.2	3	0	0.0
Pet Foods	MT	11,325	11,466	16,372	17,346	18,218	21,099	16.6	86.3	8,778	8,543	-2.7
Other Consumer Oriented	MT	10,331	9,400	13,999	17,033	14,670	16,059	8.2	55.5	6024	7272.7	20.7

Notes:

1. Source: US Customs as reported in U.S. Department of Agriculture Glogal Agricultural Trade System

2. Users should use cautious interpretation on QUANTITY reports using mixed units of measure. QUANTITY line items will only include statistics on the units of measure that are equal to, or are able to be converted to, the assigned unit of measure of the grouped commodities.

Fast Facts and Figures

Dairy Products

The Philippines is the largest export market in Southeast Asia for U.S. cheese products and the 4th largest market in the world for total U.S. dairy exports. Traders report significant growth in both standard and gourmet cheeses. The largest U.S. dairy product export by far is non-fat dry milk (NFDM), which increased 28 percent in 2011. Consumers and the burgeoning Philippine food processing industry are major purchasers of NFMD. The U.S. is the second largest dairy supplier to the Philippines, behind New Zealand.

While New Zealand and Australia will enjoy tariff advantages of 1-7% on milk powder, cheese, whey and buttermilk as a result of the ASEAN-Australia-New Zealand Free Trade Agreement, currency fluctuations can also play a significant role in the competitiveness of U.S. products.

U.S. Exports of Dairy Products to the Philippines
CY 2006 - 2011

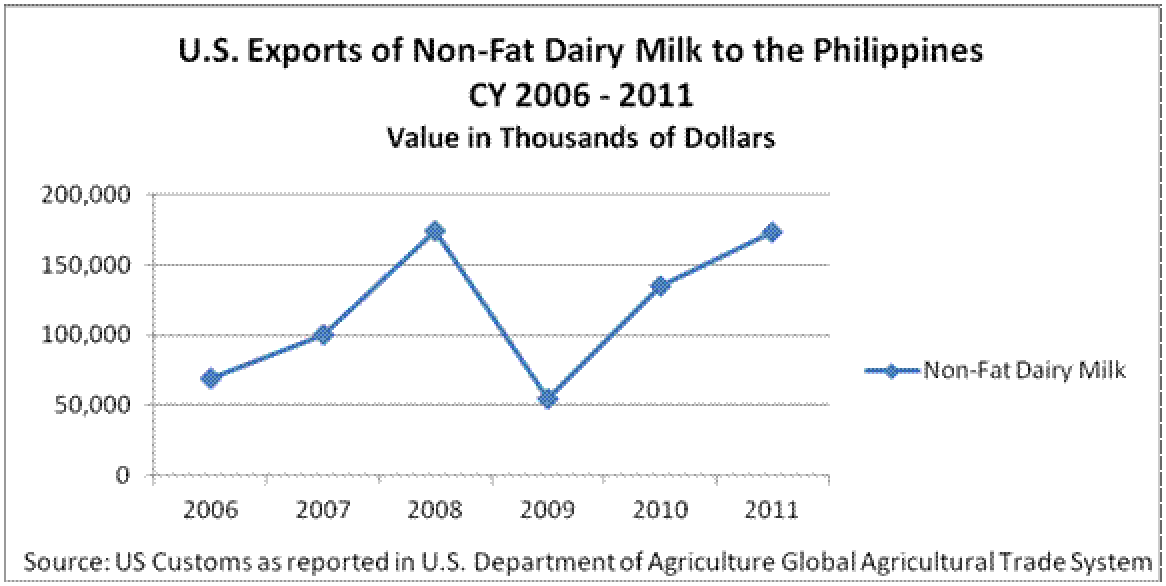
Value in Thousands of Dollars

	Calendar Years (Jan-Dec)				Comparison			% Growth
	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Non-Fat Dairy Milk	68,896	100,244	174,198	54,684	134,819	173,144	28.4	151.3
Cheese	3,298	4,312	10,979	5,995	12,158	20,035	64.8	507.5
Whey, Fluid/ Dried	13,203	22,676	10,422	10,454	18,861	19,273	2.2	46.0
Evap/ Condensed Milk	134	1,101	445	310	1,797	146	-91.9	9.0
Butter & Milkfat	9	38	459	7	0	96	--	966.7
Others	10,217	23,800	14,556	6,684	17,982	68,386	280.3	569.3
Dairy Products Total	**95,757**	**152,171**	**211,059**	**78,134**	**185,617**	**281,080**	**51.4**	**193.5**

Volume

		Calendar Years (Jan-Dec)				Comparison			% Growth
	UOM	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Non-Fat Dairy Milk	MT	33,333	33,690	50,571	27,474	49,084	51,629	5.2	54.9
Cheese	MT	950	1,078	2,632	1,660	3,403	5,521	62.2	481.5
Whey									
Fluid	KL	0	161	0	0	0	0	--	--
Dried	MT	34,283	34,768	53,203	29,134	52,487	57,150	8.9	66.7
Evap/ Condensed Milk	MT	129	649	245	276	510	55	-89.3	-57.5
Butter & Milkfat	MT	1	6	136	1	0	19	--	1,346.2
Others									
Fluid	KL	64	37	101	9	89	78	-12.6	21.7
Dried	MT	9,609	9,886	94,191	7,325	11,522	12,287	6.6	27.9
Dairy Products Total									
Fluid	KL	64	198	101	9	89	78	-12.6	21.7
Dried	MT	78,304	80,076	200,978	65,870	117,005	126,660	8.3	61.8

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


U.S. Exports of Non-Fat Dairy Milk to the Philippines
CY 2006 - 2011
Value in Thousands of Dollars
200,000
150,000
100,000
50,000
0
2006
2007
2008
2009
2010
2011
Non-Fat Dairy Milk
Source: US Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System


U.S. Exports of Cheese to the Philippines
CY 2006 - 2011
Value in Thousands of Dollars
25,000
20,000
15,000
10,000
5,000
0
2006
2007
2008
2009
2010
2011
Cheese
Source: US Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System

Red Meats

Rising demand for pork drove Philippine imports to a record level of 39,597 MT in 2010. The volume dropped by 26 percent to 29,204 MT in 2011 when exports of pork to retail markets were hurt by trade restrictive regulations on the sale of frozen meat in the wet markets as well as rising prices of U.S. pork. Exports of pork variety meats which peaked in 2009 due to low U.S. prices dropped precipitously in 2010 and 2011 as prices rose due to strengthening demand in other Asian markets and trade barriers. Agreement to remove most of these barriers reached in March 2012 should allow rapid recovery of these sales. Exports of higher value cuts and prepared/ preserved pork products to supermarkets, hotels and restaurants remained strong.

U.S. beef exports continued their strong growth, rising 47 percent by value in 2011 as U.S. prime rib and other high-value cuts become standard menu offerings in restaurants and hotels.

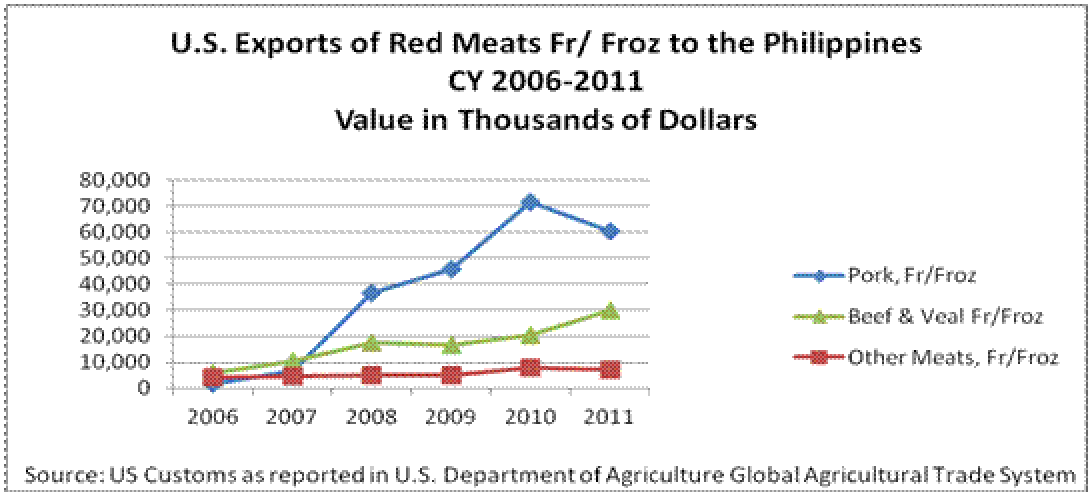
U.S. Exports of Red Meats to the Philippines
CY 2006 - 2011
Value in Thousands of Dollars

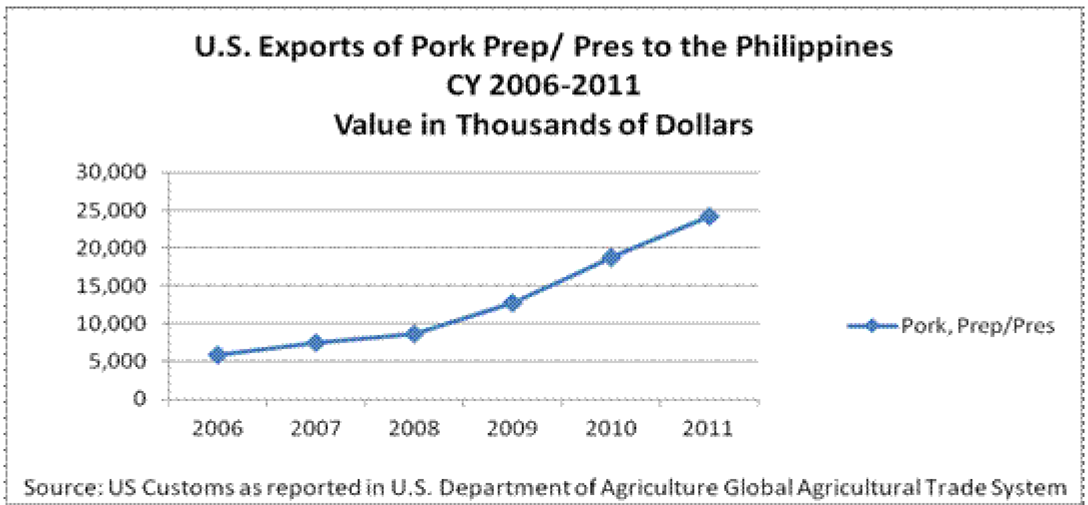
	Calendar Years (Jan-Dec)				Comparisons			% Growth
	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Pork	7,818	14,137	45,409	58,425	90,185	84,450	-6.4	980.2
Pork, Fr/Froz	1,895	6,684	36,763	45,689	71,442	60,280	-15.6	3,081.0
Pork, Prep/Pres	5,923	7,453	8,646	12,736	18,742	24,170	29.0	308.1
Beef & Veal	5,959	10,359	17,774	16,933	20,589	30,258	47.0	407.8
Beef & Veal Fr/Froz	5,813	10,238	17,689	16,679	20,373	30,085	47.7	417.5
Beef, Prep/Pres	146	121	84	254	215	174	-19.1	19.2
Variety Meats	3,052	4,653	10,452	20,788	18,764	12,609	-32.8	313.1
Beef Variety Meats	315	1,388	4,494	4,621	8,597	7,806	-9.2	2,378.1
Pork Variety Meats	2,526	3,259	5,958	16,167	10,167	4,790	-52.9	89.6
Other Variety Meats	210	5	0	0	0	13	0.0	-93.8
Other Meats, Fr/Froz	4,260	4,696	5,102	4,885	7,740	6,936	-10.4	62.8
Red Meat & Prods Total	**21,089**	**33,845**	**78,736**	**101,030**	**137,277**	**134,253**	**-2.2**	**536.6**

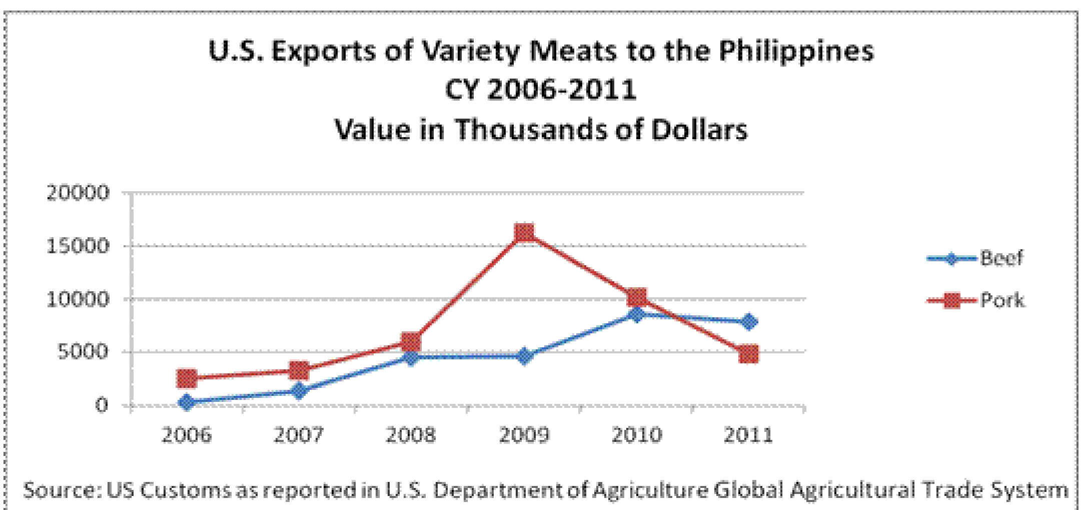
Volume

		Calendar Years (Jan-Dec)				Comparisons			% Growth
	UOM	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Pork	MT	3,581	6,097	23,286	28,764	43,951	34,577	-21.3	865.6
Pork, Fr/Froz	MT	1,309	4,004	20,875	25,465	39,597	29,204	-26.2	2,130.8
Pork, Prep/Pres	MT	2,272	2,094	2,411	3,298	4,354	5,373	23.4	136.5
Beef & Veal	MT	1,587	2,721	3,810	3,995	4,563	6,821	49.5	329.8
Beef & Veal Fr/Froz	MT	1,544	2,682	3,785	3,943	4,510	6,790	50.5	339.8
Beef, Prep/Pres	MT	43	39	25	52	53	30	-42.7	-29.4
Variety Meats	MT	3,493	4,490	9,905	17,009	14,493	9,921	-31.5	184.0
Beef Variety Meats	MT	188	1,170	4,395	4,013	6,381	5,938	-6.9	3,063.6
Pork Variety Meats	MT	3,258	3,319	5,509	12,995	8,112	3,970	-51.1	21.8
Other Variety Meats	MT	48	1	0	0	0	13	--	-72.1
Other Meats, Fr/Froz	MT	7,828	11,038	6,864	5,889	11,156	6,205	-44	-20.7
Red Meat & Prods	**MT**	**16,489**	**24,347**	**43,864**	**55,657**	**74,164**	**57,524**	**-48**	**1,359**

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


U.S. Exports of Red Meats Fr/ Froz to the Philippines
CY 2006-2011
Value in Thousands of Dollars
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
2006
2007
2008
2009
2010
2011
Pork, Fr/Froz
Beef & Veal Fr/Froz
Other Meats, Fr/Froz
Source: US Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System


U.S. Exports of Pork Prep/ Pres to the Philippines
CY 2006-2011
Value in Thousands of Dollars
30,000
25,000
20,000
15,000
10,000
5,000
0
2006
2007
2008
2009
2010
2011
Pork, Prep/Pres
Source: US Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System

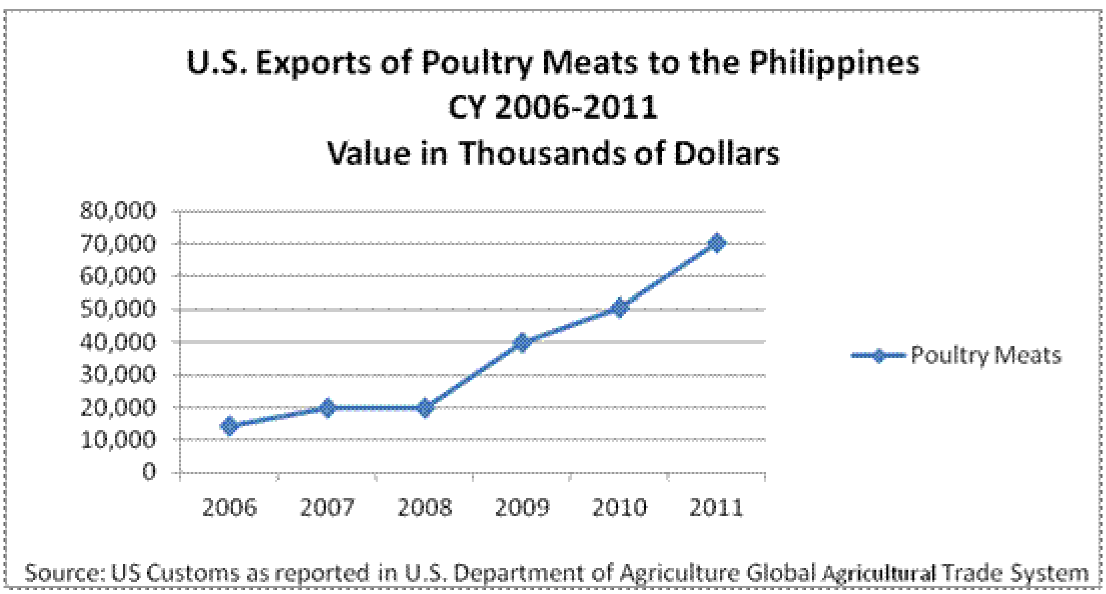

U.S. Exports of Variety Meats to the Philippines
CY 2006-2011
Value in Thousands of Dollars
20000
15000
10000
5000
0
2006
2007
2008
2009
2010
2011
Beef
Pork
Source: US Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System

Poultry Meats

The Philippines is the 2nd largest poultry meat market in Southeast Asia with export sales of $70 million in 2011 and has grown by almost 400 percent since 2006.

U.S. Exports of Poultry Meats to the Philippines CY 2006 - 2011 **Value in Thousands of Dollars**								
	Calendar Years (Jan-Dec)				Comparisons			% Growth
	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Chickens, Fr/Froz	11,206	16,109	15,466	34,929	42,476	54,685	28.7	388.0
Poultry Meats, Prep	1,588	2,330	1,427	2,769	5,405	10,373	91.9	553.2
Turkeys, Fr/Froz	1,379	1,471	2,719	1,794	2,074	4,648	124.1	237.1
Other Poultry Fr/Frz	126	68	229	367	371	331	-10.8	162.7
Poultry Meats Total	**14,299**	**19,978**	**19,841**	**39,859**	**50,326**	**70,037**	**39.2**	**389.8**

Volume									
		Calendar Years (Jan-Dec)				Comparisons			% Growth
	UOM	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Chickens, Fr/Froz	MT	18,388	15,974	13,598	35,570	46,269	57,765	24.8	214.2
Poultry Meats, Prep	MT	891	2,633	806	1,854	5,501	9,696	76.3	988.8
Turkeys, Fr/Froz	MT	1,445	1,601	2,329	1,339	2,182	5,107	134.1	253.3
Other Poultry Fr/Frz	MT	107	22	67	139	137	121	-11.3	13.6
Poultry Meats Total	**MT**	**20,830**	**20,230**	**16,799**	**38,902**	**54,089**	**72,689**	**34.4**	**249.0**
Source: US Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System									

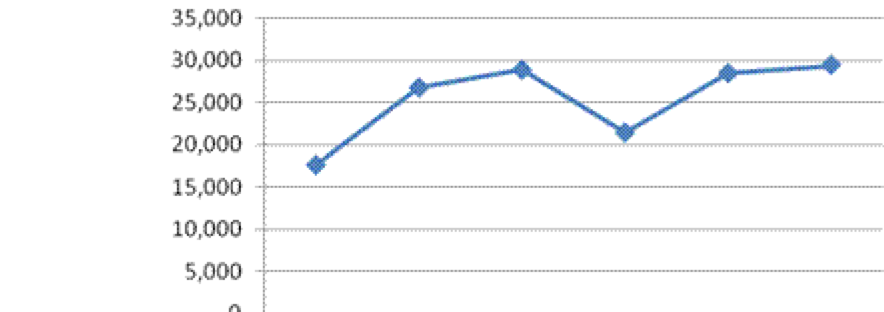


Processed Fruits & Vegetables

Export sales of processed fruits & vegetables, more than half of which are frozen potatoes reached record level sales of $62 million in 2011, and grew by almost 50 percent since 2006. The Philippines is the 2nd largest market in Southeast Asia for frozen potatoes.

	2006	2007	2008	2009	2010	2011
in Thousands of Dollars	41,571	51,621	54,876	36,867	57,223	61,692

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



	2006	2007	2008	2009	2010	2011
in Thousands of Dollars	17,602	26,731	28,856	21,389	28,442	29,373

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

Wine & Craft Beer

The Philippines is the 2nd largest market in Southeast Asia with export sales of $8 million in 2011. The U.S. remains as the largest supplier to the Philippines with a 35 percent share of the market. There is a niche market for craft beer that is gaining momentum.

U.S. Exports of Wine and Beer to the Philippines
CY 2006 - 2011
Value in Thousands of Dollars

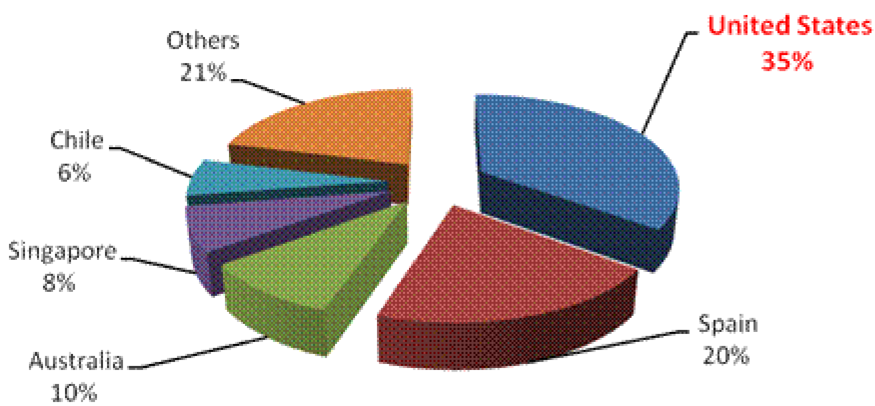
	Calendar Years				Comparisons			% Growth
	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Wine	4,243	4,588	7,731	7,293	7,903	7,798	-1.3	83.8
Beer	4	26	41	130	165	312	89.1	7,700.0
Wine and Beer Total	4,247	4,614	7,772	7,423	8,068	8,110	0.5	91.0

Volume

		Calendar Years				Comparisons			% Growth
	UOM	2006	2007	2008	2009	2010	2011	% Change	2006-2011
Wine	KL	2,212	2,511	3,072	3,141	3,372	3,257	-3.4	47.3
Beer	KL	3	29	35	120	132	224	70.1	8,848.0
Wine and Beer Total	KL	2,214	2,539	3,106	3,261	3,503	3,480	-0.7	57.2

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

Top 5 Wine Exporting Countries to the Philippines in CY 2011 Volume Percentage



Source: Philippine Customs as reported in Global Trade Atlas


U.S. Exports of Wine to the Philippines
CY 2006-2011
Value in Thousands of Dollars
10,000
8,000
6,000
4,000
2,000
0
2006
2007
2008
2009
2010
2011
Source: US Customs as reported in U.S. Department of Agriculture Gloabl Agricultural Trade System


U.S. Exports of Beer to the Philippines
CY 2006-2011
Value in Thousands of Dollars
350
300
250
200
150
100
50
0
2006
2007
2008
2009
2010
2011
Source: US Customs as reported in U.S. Department of Agriculture Global Agricultural Trade System

NEI Progress

In 2009, the White House announced the National Export Initiative (NEI) to double exports by 2014. From 2009-2011, U.S. f&b exports to the Philippines have made strong progress toward achieving that goal, up an estimated 80 percent. By the end of 2011, exports of dairy products, fresh vegetables and nursery products had already more than doubled. Post projects that f&b exports will achieve the NEI goal in 2012, and that most products in this category will have doubled by 2014.

US Consumer Oriented Food and Beverage Exports to the Philippines
NEI Progress
CY 2009 - 2011
in Thousands of Dollars

	2009	2010	2011	% Change 2009 vs. 2011
Consumer Oriented Total	423,168	601,057	761,189	79.9
Snack Foods	47,863	50,494	64,745	35.3
Breakfast Cereals	2,223	3,658	3,849	73.1
Red Meats,	83,442	110,687	103,114	23.6
Red Meats, Prep/ Pres	16,610	23,019	28,987	74.5
Poultry Meat	39,860	50,326	70,037	75.7
Dairy Products	76,575	181,533	281,025	267.0
Eggs & Products	1,619	825	1,919	18.5
Fresh Fruit	32,787	31,274	41,894	27.8
Fresh Vegetables	1,565	4,364	5,953	280.4
Processed Fruit & Vegetables	36,867	57,223	61,692	67.3
Fruit & Vegetable Juices	6,719	7,679	7,963	18.5
Tree Nuts	2,553	4,447	4,538	77.8
Wine and Beer	7,423	8,068	8,110	9.3
Nursery Products	36	36	84	133.3
Pet Foods	13,743	16,152	20,024	45.7
Other Consumer Oriented	53,283	51,269	57,255	7.5

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

Legend:
- Products that have achieved NEI Goal
- Products that are expected to achieve NEI Goal by 2014

Further Information and Assistance

The FAS Manila staff is ready to help exporters of U.S. food and beverage products achieve their objectives in the Philippines. For questions, further information or for assistance in exporting US food & beverage products, please contact:

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