



# Philippines



## MARKET SNAPSHOT | BEEF & SHEEPMEAT



### EXPORTS

Key market for frozen grassfed and grainfed beef



### CONSUMERS

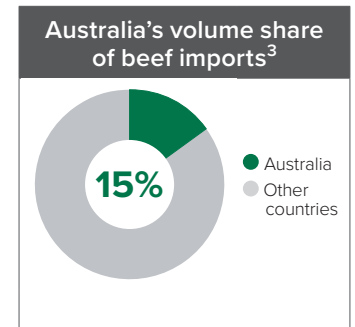
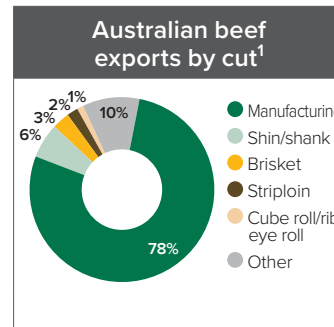
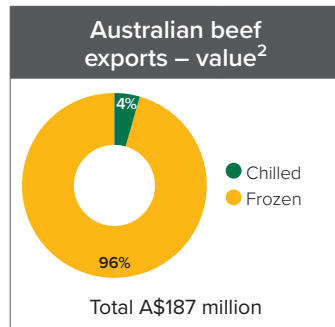
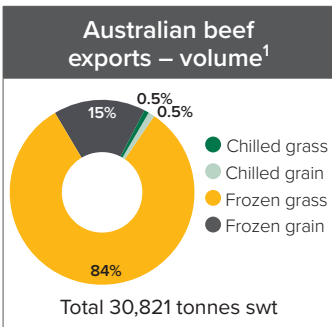
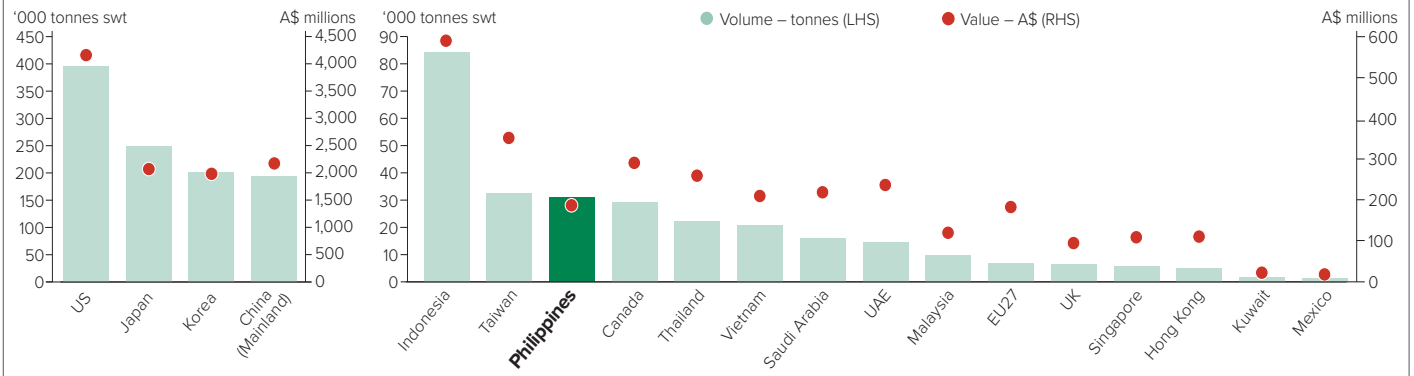
Young and large population with rising incomes and rapid urbanisation



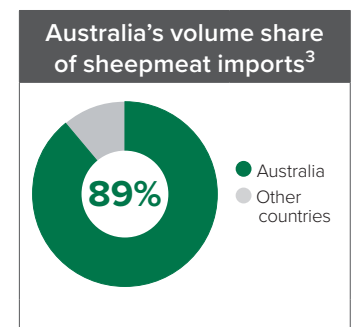
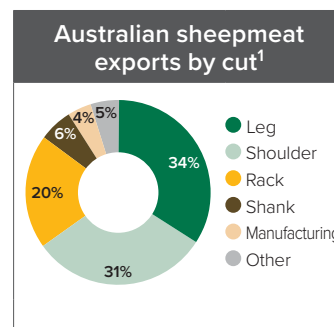
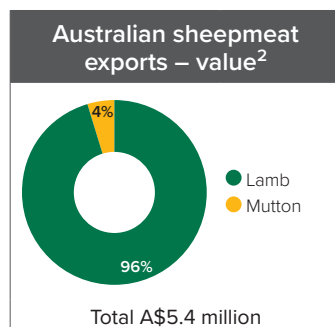
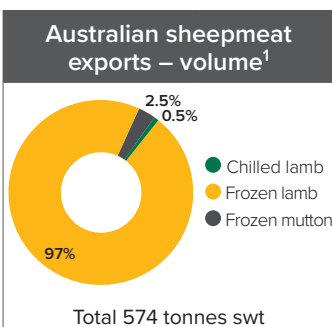
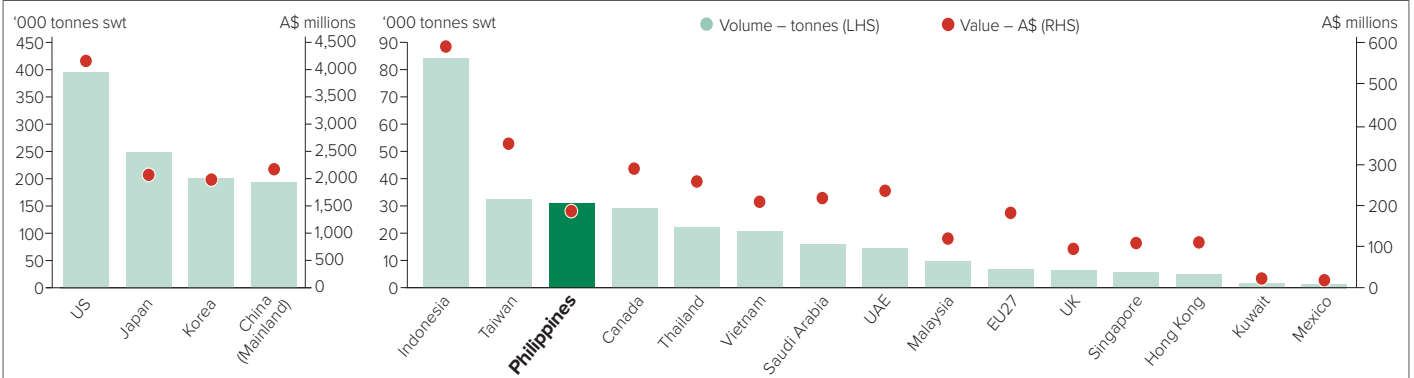
### GROWTH

Strong and ongoing demand for convenience, with safety and quality

### Australian beef exports to Philippines in a global context<sup>1 and 2</sup>



### Australian sheepmeat exports to Philippines in a global context<sup>1 and 2</sup>



Data source for charts: <sup>1</sup> DAFF (CY2024), <sup>2</sup> Trade Data Monitor (TDM) (MAT November 2024), <sup>3</sup> Trade Data Monitor (TDM) (MAT September 2024)

## CONSUMERS



- While consumer sentiment has been weak, positive economic metrics, such as easing inflation and a stable labour market, are forecast to support good spending growth in the coming years (Source: Fitch Solutions).
- Filipinos' per capita protein consumption is dominated by chicken and pork, which are considered cheap and versatile. However, beef is a relatively frequently consumed item and popular among young and wealthy consumers.
- Beef is regarded as the most superior meat with great taste and consistent quality standards, driving consumers to be willing to pay more for it than other proteins. This trend is particularly strong among the young (Source: MLA Global Consumer Tracker Philippines 2022).
- The Philippines has the most youthful population among South-East Asian countries, with those aged between 15 and 29 accounting for around 26% of the population (Source: Fitch Solutions). In line with regional trends, younger consumers are aspirational, digitally and socially connected, enthusiastic about dining experiences and enjoy more red meat.
- Compared to other consumers in the Asia Pacific region, Filipinos have a high level of concern about their personal health. Hence, the impact of a food product or service on consumers' health and wellbeing is a top attribute influencing their purchase choices (Source: GlobalData consumer survey Q2, 2024). Grassfed and organic beef are particularly well-positioned to address health and wellbeing concerns and are beef types with relatively high awareness. Consumers in this market strongly associate claims with health and environmental benefits (Source: MLA Global Consumer Tracker Philippines 2022).
- Beef is a common protein of choice for Sunday family lunches in the Philippines. Beef dishes such as *bulalo* (soup made with beef shank), *kaldareta* (beef stew with vegetables), *beef pares* (braised beef), *sinigang* (soup made with beef ribs) and *salpicao* (beef dish originating in Spain) are popular.

- Spanish-style beef dishes are commonly consumed for daily meals, while steak is a dish more popular for family gatherings. Imported beef products, including those from Australia and the US, are widely used by younger and affluent consumers in their home cooking repertoires.

### Top attributes when Philippines consumers select between meats

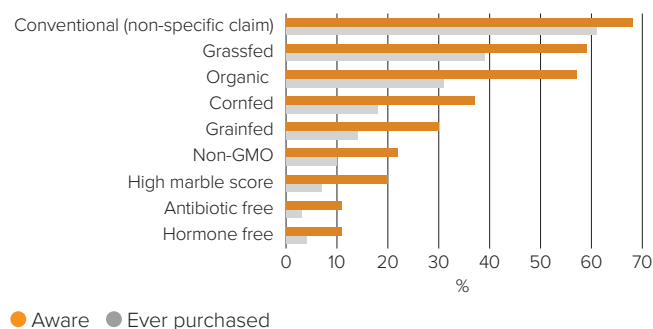
My/my family's favourite meat
Tastes delicious
Easy and convenient to purchase
Consistent quality standards

### Top attributes for Philippines consumers to justify a premium price for meat

Is the most superior meat
Consistent quality standards
Tastes delicious
Is my/my family's favourite meat

Source: MLA Global Consumer Tracker Philippines 2022

### Philippines consumers beef type awareness and past purchases



Source: MLA Global Consumer Tracker Philippines 2022

- The Philippines is also a notable market for beef offal and among Australia's top 10 export destinations, particularly for tripe.

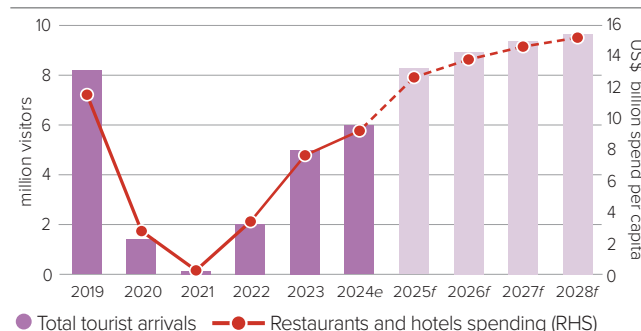
## FOODSERVICE



- Overall, the foodservice sector is highly fragmented and dominated by small, local independent restaurants, especially full service restaurants (FSR), although the Philippines has a relatively well established, modern chained segment. Quick service restaurants (QSR), representing the largest channel in sales, are more concentrated and dominated by chain operators. The local fast-food chain Jollibee is a global brand with over 1,600 restaurants worldwide, with beef burgers featuring prominently on the menu.
- Frequent QSR diners are skewed to millennials who seek convenience and value for money, while those visiting FSR are looking for unique and exciting flavours and greater variety of cuisines and dishes. Diners' desire for novelty pushes restaurants to frequently introduce new dishes, which the versatility and range of Australian beef products is well-suited to supporting.
- The Philippines' food culture is diverse, with strong influences from Spain and the US. Western-style menus are often featured in modern restaurants.
- The Philippines' foodservice sector is growing at a robust rate, driven by the young, aspirational population with rising disposable incomes, rapid urbanisation and the continuous expansion of shopping malls and modern, contemporary food hubs in major cities across the country.

- Tourism is also an important component driving growth in the foodservice sector, especially in the FSR segment. The tourism activity is forecast to exceed pre-pandemic levels during 2025. The number of tourists the Philippines receive is smaller than that of Indonesia and Vietnam but with a higher per capita expenditure.
- Home meal delivery and take-away continue to grow in foodservice channels, with the expansion of delivery apps and growing demand driven by an affluent, digital population seeking more convenience.

### Philippines international tourist arrivals and restaurants and hotels spending



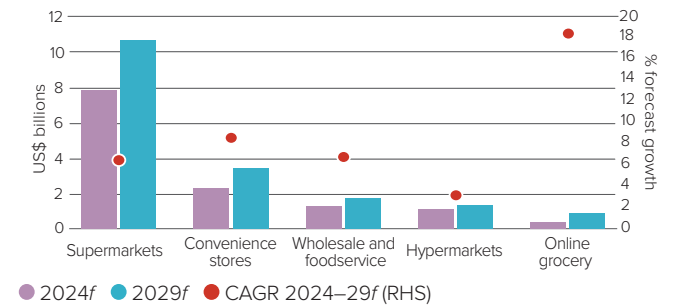
Source: Fitch Solutions



- The Philippines' grocery market is one of the fastest growing in South-East Asia and the second fastest in Asia after India (Source: IGD). With a market share of approximately 77% in 2023, traditional channels are still dominant in the Philippines' grocery retail sector. However, modern retail, particularly the online channel, is expanding at a rapid rate, underpinned by a booming young population, urban expansion and evolving shopping habits.
- Imported beef is mostly sold in Manila, where there is a high concentration of modern retailers and the cold chain is more developed. At the same time, modern retailers are investing to increase their presence in second-tier regions such as Visayas and Mindanao.
- Supermarkets and hypermarkets are the preferred purchase points for imported beef, and wet markets are where mostly local beef is sold. Australian beef is generally sold in higher-end modern retail outlets such as S&R, Shopwise, Robinsons, The Market Place.
- The emerging health-food category, including organic and products with natural claims, is being driven by demand from wealthy and health-conscious consumers. For example, Australian beef is sold through specialist gourmet food retailers such as One World Deli and Joel's Place.
- Although online grocery is relatively small compared to the regional average, the pandemic forced retailers to develop their online operations. Philippines' online grocery retail channel will see the fastest sales growth of all modern channels, forecast to grow at a compound annual growth rate (CAGR) of 20.8% from 2023 to 2028 (Source: IGD). Subsequently, online sales of beef have grown, with 39% of beef consumers claiming they purchased beef online in the past six months in 2022, and 26% having done so at least monthly (Source: MLA Global Consumer Tracker Philippines 2022).

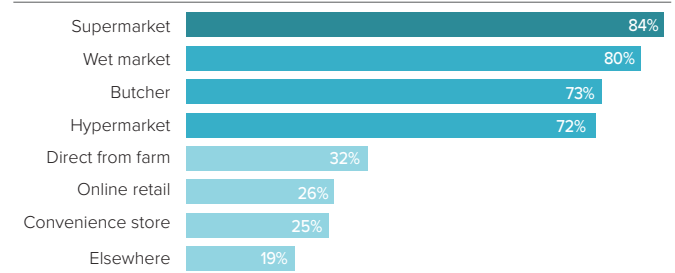
- The financial impact of the pandemic and the concern about inflation has kept home cooking frequency high. Cuts suitable for home cooking gained momentum in Australia's beef exports in recent years, such as brisket, shin/shank, stiploin, rump, chuck roll and blade (Source: DAFF).

Grocery retail sales by channel forecast



Source: IGD, Excludes traditional channels and drug stores, CAGR = compound annual growth rate

Filipino monthly beef shoppers' purchase channels



Source: MLA Global Consumer Tracker Philippines 2022. Shoppers who purchase beef at least once a month to cook at home

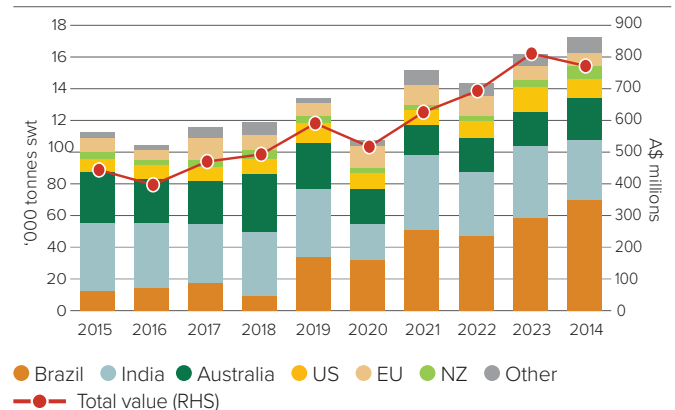
COMPETITIVE LANDSCAPE



- The Philippines is a high volume beef import market, with a long-term upward demand trend. Imports doubled over the decade from 2013 to 2023, reaching a record-high volume and value in 2023. This volume has been sustained in 2024 so far with 163,317 tonnes shipped weight (swt) imported in the 12 months ending June 2024. However, the total import value was 10% lower year-on-year at A\$737 million due in part to lower average prices for Brazilian beef (Source: Trade Data Monitor (TDM)). Beef imports are playing a bigger role in filling the gap between domestic production and growing consumption demand, underpinned by rising incomes, foodservice sector expansion and demand for safe meat.
- Australia, Brazil, India, the EU, and the US are all major suppliers. Brazil's exports have grown dramatically in recent years, overtaking India to be the largest beef supplier to the Philippines, with a 40% import volume share in the 12 months ending June 2024. This strong import growth was driven mainly by increased demand for more affordable products, particularly from Brazil but also India.
- Beef imports from Australia, the US and NZ are the most recognised countries of origin and have a superior quality profile in the minds of consumers. These products are predominantly utilised in high-end foodservice and sold in premium modern retail.
- Foodservice sector demand for quality beef continues to gradually increase, following softer demand during the pandemic years.

- The EU is another key supplier, providing a total of 13,528 tonnes swt in the 12 months ending June 2024. Ireland represents around 56% of total beef from the EU, followed by the Netherlands at 15% and Germany at 11% (Source: Trade Data Monitor (TDM)).
- Among the top ten largest suppliers, the fastest-growing over the past three years have been Brazil, Australia and New Zealand (Source: Trade Data Monitor (TDM)).
- Despite remaining at small volumes, imports of Japanese beef have generally trended up since 2015, with a total of 48 tonnes imported in the 12 months ending June 2024 (Source: Trade Data Monitor (TDM)).

Philippines beef imports by supplier\*



Source: Trade Data Monitor (TDM), \*MAT year ending July



# Sheepmeat

## CONSUMERS



- Sheepmeat is a niche protein in the Filipino diet as it is elsewhere. It is typically consumed on special occasions at foodservice venues rather than at home.
- Consumer awareness of lamb is relatively low compared to other meat proteins. However, it is seen as a superior protein of high nutritional value with consumers willing to pay more for it (Source: MLA Global Consumer Tracker Philippines 2022).
- Lack of knowledge about how to cook sheepmeat and unfamiliarity with the protein remain key challenges for home consumption, whilst price and availability are the top barriers to buying lamb (Source: MLA Global Consumer Tracker Philippines 2022).
- Younger consumers aged under 35 seek new experiences and novelty and hence tend to eat lamb more frequently than older

generations. Additionally, lamb is more popular in households with children due to its perceived positive nutritional profile.

### Attributes associated with lamb

✓	High nutritional value
✓	Animals are well cared for
✓	Low in fat
✓	Consistently high quality
✓	The most superior meat
✓	Willing to pay more for lamb

Source: MLA Global Consumer Tracker Philippines 2022

## FOODSERVICE



- The majority of Australian sheepmeat exports to the Philippines are utilised in high-end full-service restaurants, including 4 and 5 star hotels. Sheepmeat consumption and import demand post-pandemic have been recovering as economic activity and tourism also recover.
- Australia's key sheepmeat exports to the Philippines are largely frozen lamb leg, shoulder and rack (Source: DAFF).



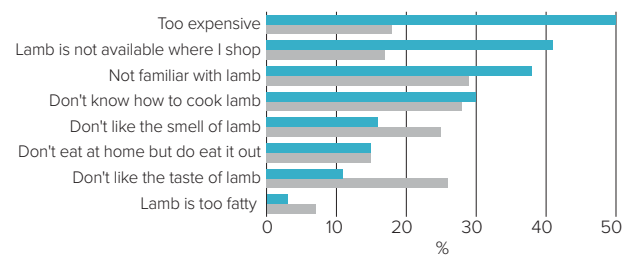
Australian lamb can be found on Philippines' fine dining menus

## RETAIL



- Imported sheepmeat is typically sold in supermarkets, hypermarkets and up-market butcher shops.
- Consumer education remains the key to growing sheepmeat consumption in the Philippines. Inspired cooking ideas, preparation tips and ready-to-cook options are among the immediate methods enticing Filipinos to try cooking sheepmeat at home.
- Premium online retail has grown since the COVID-19 pandemic. The Philippines' retail sector is seeing a growing number of independent, upmarket-oriented online stores targeting affluent consumers. Some examples include Delidrop, Gerald, Gourmet Direct and Prime Choice, where Australian sheepmeat products can be found.

### Reasons for Filipino consumers not purchasing lamb



● Philippines ● Global average\*

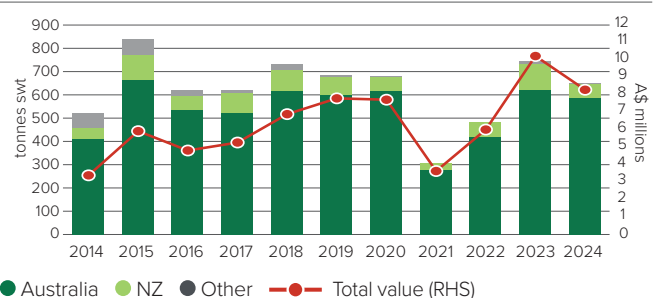
Source: MLA Global Consumer Tracker Philippines 2022, \*Average of the US, KSA, UAE, China, Korea, Japan, Qatar, Singapore, Vietnam and Canada

## COMPETITIVE LANDSCAPE



- The Philippines' sheepmeat market is predominantly supplied by local production, which is actually mostly goatmeat. Imports account for less than 2% of total sheepmeat consumption, with Australia, New Zealand and the US being leading suppliers.
- Sheepmeat imports have been on a long-term gradual upward trend, though volumes for the 12 months ending June 2024 were 20% lower year-on-year due to softer demand compared to other importing markets. These include the US, China, MENA and other South-East Asian countries such as Malaysia. Australia accounted for 86% of the imported sheepmeat in this period (Source: Trade Data Monitor (TDM)).

### Philippines sheepmeat imports by supplier\*



Source: Trade Data Monitor (TDM), \*MAT year ending July





## Market access overview – beef

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia New Zealand Free Trade Agreement ( <b>AANZFTA</b> )  Regional Comprehensive Economic Partnership ( <b>RCEP</b> ) Agreement (Philippines became a signatory in Feb 2023)	0%	<b>Brazil, US, Canada:</b> No FTA, 10%  <b>India:</b> ASEAN-India FTA: 5% for most of products, 0% for frozen boneless product  <b>EU:</b> FTA under negotiation, tariff 10%  <b>New Zealand:</b> Same conditions as Australia	Zero	No major hurdles

Best access  Major challenges

Source: Trade agreements, DFAT, WTO, Philippine Department of Trade and Industry



## Market access overview – sheepmeat

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia New Zealand Free Trade Agreement ( <b>AANZFTA</b> )  Regional Comprehensive Economic Partnership ( <b>RCEP</b> ) Agreement (Philippines became a signatory in Feb 2023)	<b>Under AANZFTA:</b> 0% for all product lines	<b>New Zealand:</b> Same conditions as Australia	Zero	No major hurdles

Best access  Major challenges

Source: Trade agreements, DFAT



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