



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 3/3/2006

GAIN Report Number: RP6008

Philippines

Food Processing Ingredients Sector

Report

2006

Approved by:

Dennis Voboril, ATO Director
FAS Manila

Prepared by:

Patrick Quianzon

Report Highlights:

The Philippine food processing industry has remained resilient and is estimated to grow at an annual rate of 10 percent. The U.S. remains the top food and beverage ingredient supplier despite the increased competition from other countries. Changing trends in the market has created new opportunities for introducing new and variant products.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Manila [RP1]
[RP]

I. Market Summary

Philippine Food Processing Industry Overview

Food manufacturing, including food and beverage processing remains the Philippines' most dominant primary industry accounting for 40.1 percent of total output in manufacturing. The gross added value is more than \$2.0 billion with an annual increase estimated at 8-10 percent. The Philippine Bureau of Food and Drugs' Statistical Report of Establishments for 2004 lists 11,601 total number of food processing establishments nationwide. Most of the companies are owned by a single proprietor that are common among micro, cottage and small industries; and a few large multi-product firms, some of which operate in partnership or as a subsidiary of foreign or multinational companies. Unlike many other countries in the region - where multinationals dominate food sales - local companies like San Miguel, RFM Corporation, Universal Robina Corporation and a few others dominate the market or compete equally with foreign players.

The food processing industry is comprised of the following major sectors: fruits and vegetables, fish and marine products, meat and poultry products, flour and bakery products, beverages, confectioneries, dairy products, food condiments and seasonings, food supplements, bottled water, snack foods and fats & oils. The industry contributes approximately 20 percent of GDP per annum. Domestic processors continue to face numerous challenges, including high electricity cost; improvements and innovations in technology and packaging from competitors; inefficient or non-existent post-harvest and storage facilities; and inadequate farm-to-market support. Recently, there has been considerable improvement, particularly for larger companies that are able to support expensive capital outlays.

According to the Philippine National Statistics Office, food and beverage imports totaled \$2.2 billion in 2004. An estimated 60 percent of these are raw materials or ingredients used in food processing. Wheat, dairy products, beef, and soybean products topped the list of imported products for further processing. (see table in Section III).

The US has remained the top exporter in total volume per country in 2004 at 1.4 billion kg followed by Canada (456 million), China (381 million), Australia (337 million), Malaysia (249 million) and India (214 million). As a group, combined exports of ASEAN reached 585 million kg. Wheat, whey, soybean, peas, potato products and meat/fish extracts are the top exports from the US.

Advantages and Challenges for US exporters:

Advantages	Challenges
U.S. ingredients are highly regarded for quality and product consistency.	Strong competition from other exporting countries.
Two thirds of the population is below 30 years of age and are heavily influenced by Western habits and culture through media, and are observed to be very open to processed and ready to cook, ready to eat and imported food products	Volatile exchange rate resulting in US ingredients becoming expensive can shift buyers' purchases to source cheaper alternatives to keep current market prices in a very price sensitive market.
Proliferation of malls and accompanying expansion in the retail and dine out establishments especially on American	Available supply from regional facilities licensing American brands and an abundant domestic supply especially on fresh

Advantages	Challenges
franchises that require American ingredients.	vegetables, poultry and seafood products.
Market is far from saturated with plenty of room for growth in the regional areas of the Philippines with a growing middle class market.	Deficient distribution and cold chain systems in place.

II. Road Map for Market Entry

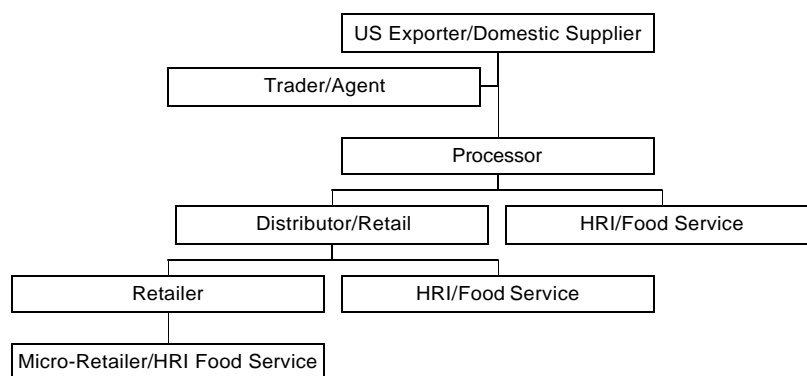
A. Entry Strategy

New to market US exporters should consider the following when planning to enter the market

- Filipino businessmen value interpersonal relationships and U.S. exporters should work to develop and maintain close contact and if possible, make regular visits to their clients to reaffirm their commitment and support.
- While there is an increasing trend to import directly, especially by the large multi-products companies, most processors still rely on traders or agents. This allows the food processing company to not deal directly with any quality problems.
- Competitive pricing as compared to other imported suppliers. While American products are usually highly regarded for their high quality and product consistency, consumers are highly price sensitive and processors may switch to other suppliers if they think the market cannot accept price increases.
- Willingness to be flexible to changes in the market requirements like adjustments in formulations as dictated by the changing consumer trends.
- Can work with one or several importers. Exclusive distributorship agreements are difficult to enforce in the Philippines while parallel imports are common.

B. Market Structure

This diagram gives an overview of the usual distribution channel for imported food ingredients, with a similar pattern from domestic suppliers to the retail and HRI sector.



Large food processing companies typically prefer to buy their imported food ingredients directly wherein they have control of the price and quality but also buy through a trader/agent because:

- the quantity required is minimal
- unresolved technical or quality problems with supplier in the past. Now prefer the trader/agent to deal with these problems.

While most companies have their own distribution network, especially in supplying their major accounts or the big retailers, a considerable number use the services of a distribution company to tap into smaller grocers and micro-retailers.

C. Company Profiles

The following lists the major manufacturing companies of several processing sectors. A number of these companies are multi-product, have subsidiaries or partners in the industry and what is indicated are figures of only the specific sectors.

A. Production, processing and preserving of meat and meat products:

Company	Sales (\$ 000)	End-use Channels	Production/Plant Location
The Purefoods-Hormel Company, Inc.	149,964	Retail	2 (Philippines) that also processes for Purefoods Hormel and San Miguel Campocarne
RFM Corp.	80,196	Retail	1 (Philippines)
Swift Foods, Inc.	70,875	Retail	1 (Philippines)
San Miguel Purefoods Company, Inc.	60,553	Retail	1(Philippines)
Fil-Am Foods, Inc.	30,464	Retail	1 (Philippines)

Note: Purefoods-Hormel and San Miguel Company, Inc. are owned by San Miguel Corporation.

B. Flour milling except cassava flour milling

Philippine Foremost Milling Corp.	99,642	HRI	1 (Philippines)
Pilmico Foods Corp.	83,125	HRI	1 (Philippines)
Morning Star Milling Corp.	31,660	HRI	1(Philippines)
Liberty Flour Mills, Inc.	30,803	HRI	1 (Philippines)

C. Manufacturer of Chocolate and cocoa products including chocolate candies

Cocoa Specialties, Inc.	24,928	Retail	1 (Philippines)
-------------------------	--------	--------	-----------------

D. Processing of fruit and vegetable sauces

Southeast Asia Food, Inc.	44,142	Retail	2 (Philippines)
Heinz UFC Philippines	34,285	Retail	2 (Philippines)
Genosi, Inc.	14,053	HRI	1 (Philippines)

Note: Southeast Asia Food, Inc. and Heinz UFC Philippines are sister companies.

E. Manufacture of Dairy Products, n.e.c.

Yakult Philippines	23,642	Retail	1 (Philippines)
--------------------	--------	--------	-----------------

F. Manufacture of Butter and Cheese

Company	Sales (\$ 000)	End-use Channels	Production/Plant Location
Kraft Foods Philippines, Inc.	109,535	Retail	1 (Philippines)
Magnolia, Inc.	65,464	Retail	1 (Philippines)

Note: Magnolia, Inc. is also owned by San Miguel Corporation.

G. Baking of bread, cakes, pastries, pies and similar "perishable" bakery products

Goldilocks Bake Shop, Inc.	52,053	HRI/Retail	3 (Philippines)
Gardenia Bakeries Philippines, Inc.	18,071	Retail	1 (Philippines)
Golden Donuts, Inc.	15,767	HRI/Retail	1 (Philippines)

H. Baking of biscuits, cookies, crackers, pretzels and similar dry bakery products

Monde Nissin Corporation	269,357	Retail	1 (Philippines)
Monde M.Y. San Corp.	56,553	Retail	1 (Philippines)

Note: Monde M.Y. San Corp. is a subsidiary of Monde Nissin Corporation

I. Manufacture of macaroni, noodles, couscous and similar farinaceous products

Unilever Foods Philippines (CMC), Inc.	121,214	Retail	3 (Philippines)
--	---------	--------	-----------------

J. Manufacture of candies (excluding chocolate candies) and chewing gum

Wrigley Philippines, Inc.	23,321	Retail	1 (Philippines)
---------------------------	--------	--------	-----------------

K. Manufacture of ice cream and sherbet, ice drop, ice candy and other flavored ices

Unilever RFM Ice Cream, Inc.	24,714	HRI/Retail	1 (Philippines)
------------------------------	--------	------------	-----------------

L. Manufacture of snack products such as corn curls, wheat crunchies and similar products

Universal Robina Corp.	403,267	Retail	1 (Philippines) 5 (Asia)
Commonwealth Foods, Inc.	22,000	Retail	1 (Philippines)
Liwayway Marketing Corp.	19,071	Retail	3 (Philippines)

M. Manufacture of drinks flavored with fruits juices, syrups & other materials

Philippine Beverage Partners, Inc.	86,446	Retail	9 (Philippines)
Marina Sales, Inc.	36,589	Retail	1 (Philippines)
Zest-O-Corp.	29,071	Retail	4 (Philippines)

Note: Philippine Beverage Partners, Inc. is a subsidiary of San Miguel Corporation.

Source: Business World Top 1,000 Corporations 2005

D. Sector Trends

Industry players:

The multi-product food and beverage processing companies and multinationals or those with foreign partners dominate most of the categories. A number of them have also increased their presence in Asia by exporting, joint ventures, direct investment or acquisition of established companies in other countries with the enormous opportunities in these markets and their proximity advantage.

San Miguel Corporation – the country's biggest conglomerate, its extensive business covers more than 100 facilities all over Asia Pacific and its products are distributed or exported to 40 different overseas markets. It has established partnerships with Hormel Foods International Corporation, the Great Wall Group and the La Salle Company. Under San Miguel Purefoods Company, Inc., it offers a complete line of food products and services for both individual and food service customers. Its businesses range from vegetable oils, feeds, flour, poultry, fresh and processed meats, dairy products to food service. Its latest acquisition includes Berri Ltd. and National Foods of Australia.

RFM Corporation - is the second largest food and beverage conglomerate in the Philippines. Its food and beverage business include flour-based products, ice cream, meat based products, pizza, fruit juices and milk based products. Various acquisitions, partnerships and licensing agreements are with Sunkist Growers Inc., Unilever Philippines Inc., Little Caesar Enterprises, for its pizza business, American Dairy Queen Corporation for ice cream retailing business.

Universal Robina Corporation - is one of the largest branded food product companies in the Philippines that manufacture and distribute a diverse mix of snack, chocolate, candy, biscuit, bakery, beverage, noodles and tomato-based products. It has manufacturing facilities and warehouses in several Asian markets. Some of its branded consumer food operations are through its wholly-owned or majority-owned subsidiaries and joint venture companies like Hunt-URC and Nissin-URC.

Nestle Philippines, Inc. – it is among the country's Top 10 Corporations and its products are No. 1 or strong No. 2 brands in their various categories. It has 5 major manufacturing facilities in the Philippines that supply both the domestic and export market in ASEAN. Its product range has expanded to include coffee, milk, infant nutrition, infant food, beverage, non-dairy creamer, food, ice cream and chilled dairy, breakfast cereals, and confectionery.

Goldilocks Bakeshop Inc. – is the No. 1 retail chain bakeshop in the Philippines with 192 branches nationwide and 17 in North America. It has remained focused on providing classic Filipino favorites of cake, pastry, bread and snack products that are popular as gifts and take home packages. The company first opened shop on May 1966. In 1992, it diversified into food service. It has recently announced plans to expand into key Asian markets like Hong Kong, Thailand and Singapore.

Southeast Asia Food, Inc. – is the country leading sauce and condiment company and is the sister company of Heinz UFC Philippines. The product range of both companies includes banana ketchup, hot sauce, sweet chili sauce, tomato ketchup, fish sauce, soy sauce and vinegar.

Monde Nissin Corporation - is considered as one of the industry leaders in both noodles and biscuit product categories. Its partnership with Monde M.Y. San Corporation makes it the

market leader for biscuit and crackers that are also exported to North America, Europe, the Middle East and Asia.

Sector Trends:

Following are some of the trends affecting the food processing industry:

New beverage flavorings – the success of a green tea based ready- to-drink has encouraged renewed competition among beverage processors of flavored water, energy and health drinks to introduce new flavors highlighting the health benefits. Powdered drinks still dominate the market of non carbonated beverages over ready-to-drink but processors are aggressively looking for other varieties of flavorings. Even in the carbonated drink market, while still a minor player compared to Coke, Pepsi and Virgin, a local processor has been making inroads with its local fruit-flavored sodas like calamansi (lime) and dalandan (sweet orange).

Fruit and nut varieties – Ice cream processors, especially those catering to the mid to high end market, are always on the lookout for new fruit variants they can introduce on a seasonal basis in addition to their regular tropical fruit lines. Tree nut varieties, especially those not grown in the country, have also witnessed an increase in usage. In addition to bread and ice cream, tree nuts are increasingly used in the food service sector, organic or health food outlets; and family and fine dining establishments.

Low fat and sugar free – again, with the increasing health consciousness among consumers, processors have introduced “light”, “non-fat” or “low sodium” products like milk, cheese, butter, margarine and canned products. “Sugar free” drinks, baked products and confectionery are also available but with the Filipinos inclination for sweet products will most likely remain a niche market.

Food fortification – the Department of Health had a 5 year food fortification program called the Sangkap Pinoy Seal (SPS) to help battle nutrition inadequacy among Filipinos. Food processors that fortify their products with the recommended levels of various vitamins and micronutrients were allowed to put the SPS logo in their product labels as a way of informing consumers that their products can help in addressing the nutrition problem. The government aggressively campaigned for this program, with major food processors responding and pursuing fortification for most of their products. These products included canned/preserved food, frozen processed food, dairy products, baby food, oils and fats, noodles, ready-to-eat meals, dried processed foods, bakery products, sweet and savoury snacks, spreads, sauces, dressings and condiments.

New snack flavors – cheese, barbecue and onion remain popular flavors in most snack products. However, processors have developed new variants such as onion, salt, garlic and vinegar, ketchup flavored, and are looking into increased usage of other flavors such as beef, sweet corn, sour cream and onion.

Local and regional tastes – new variants or products that capture local or Asian tastes have been introduced particularly in noodle, meat and condiments processing designed to appeal to the local or Asian taste. This is because local dishes are almost always indispensable in many households, despite the increasing Western-style preferences.

Consumption Trends:

The lifestyle of the urban Filipino is continually changing. Increasingly, the urban consumer not only spends more time away from home but even home cooked meals are being replaced by packaged or processed foods in the dinner table. Reasons include heavy traffic, rural

residents commuting daily to nearby cities, increasing rarity of domestic household help, both parents working or one or both parents working overseas, and graveyard shifts of those working at 24-hour call centers. Supermarkets and convenience outlets now typically serve packaged or ready-to-eat meals.

The National Statistics Office – Family Income and Expenditures Survey 2003 revealed that the proportion of expenditure on food consumed at home went down slightly from 38.6 percent in 2000 to 37.3 percent in 2003.

With the Filipino propensity for buying only for each day's or each meal requirement, the variety and availability of smaller retail packs have increased. Food processors realize that this is a growing segment of the market, not only among low income but also among the work force. This habit is deeply ingrained, even in households that have refrigerators or freezers.

Food that is healthy and nutritious is also becoming a conscious part of the Filipino diet. Especially popular are the products that are affordable, convenient and filling to the stomach. Because of the government's effort to address nutrition inadequacy and the multi media attention given to health and nutrition, fortification in processed foods is becoming a staple with companies highlighting their application in packaging and advertising.

In addition to food processor companies, opportunities abound to supply the raw ingredient requirements of food commissaries that cater to restaurant chains and fast food establishments. Opportunities also exist for higher-priced ingredients for high-end independent bakers, restaurants and hotels. With a double digit annual growth - some years around 20 percent - attributed to the increasing percentage of income spent on food eaten outside the home and coupled by a changing urban lifestyle, demand from these establishments are expected to increase.

III. Competition in the Sector

Product Category	2004 Import Statistics	Major Supply Source (\$)	Strengths in Key Supply Countries	Advantages/ Disadvantages of Local Suppliers
Red meat (Beef and pork)	125 m kilos \$ 116.97 m(FOB)	India (54%) Australia (28%) USA (1%)	Indian buffalo beef that is priced competitively and used for corned beef.	Shortage of supply. Most are sold fresh to wet markets and supermarkets
Milk and cream in solid form	261.8 m kilos \$ 359m(FOB)	New Zealand(39%) Australia(22%) USA(1%)	Australia and New Zealand are major producers of milk	Domestic production is very minimal to supply industry requirements.
Whey or modified whey	50.4m kilos \$31.3m(FOB)	USA (31%) Australia (28%) France (17%)	USA, while preferred as a suppliers has lost share due to price.	No domestic supply available.
Wheat and wheat flour	2,157m kilos \$335m (FOB)	USA (50%) Canada (20%) China (13%)	Quality, consistency and in-country trade servicing which is	No domestic production.

Product Category	2004 Import Statistics	Major Supply Source (\$)	Strengths in Key Supply Countries	Advantages/ Disadvantages of Local Suppliers
			crucial in maintaining the loyalty of buyers/users.	
Edible Nuts	2.6 m kilos \$.9 m(FOB)	India (50%) Vietnam (18%) USA (11%)	India mainly supplies groundnuts while the USA other types like almonds, pistachios, macadamia, etc.	No domestic production of a variety of edible nuts used by bakeries, ice cream companies or re-packed under a local brand for the retail sector.
Dried fruits	4.1m kilos \$2.3 m(FOB)	Iran (39%) USA (35%)	Raisins are the major item brought in under this category both from the USA and Iran.	No domestic production of a variety of dried fruits used by bakeries, ice cream companies or re-packed under a local brand for the retail sector.
Dried, shelled leguminous vegetables	82.2 m kilos \$17.9 m(FOB)	USA (24%) Myanmar (19%) Indonesia (14%)	USA supplies mainly peas and lentils while Myanmar and Indonesia for beans.	No domestic production.
Tomato paste/puree	15.7 m kilos \$8.1 m(FOB)	USA (41%) China (28%) Turkey (9%)	Mainly tomato paste is being imported for processing.	Domestic production cannot keep up with the volume, consistency and quality required by processors.
Extracts, essences, concentrates of coffee	7 m kilos \$19.2m(FOB)	Malaysia(40%) Indonesia(30%) USA(4%)	Proximity to Philippines and pricing compete with other markets.	Domestic production cannot meet demand of the market.
Cocoa beans, powder, paste and butter	16.1 m kilos \$25.5m(FOB)	Indonesia(51%) Malaysia(28%) USA(2%)	Proximity to Philippines and pricing compete with other markets.	Supply cannot meet the increasing consumption.
Spices in bulk	2.7 m kilos \$3.1 m(FOB)	Singapore(23%) China(10%)	Proximity to Philippines and	Mostly still sold in unpacked or

Product Category	2004 Import Statistics	Major Supply Source (\$)	Strengths in Key Supply Countries	Advantages/ Disadvantages of Local Suppliers
		USA(10%)	pricing compete with other markets.	unlabelled formats in open markets.
Sugar derivatives (lactose, fructose, glucose and other sugars)	83.2 m kilos \$29.4m(FOB)	China(34%) USA (27%) Thailand(6%)	Technology to obtain the required specifications.	While the country now exports sugar, it does not have the technology to process sugar derivatives required by carbonated or cola companies.
Fresh/Frozen potatoes	37 m kilos \$13.8m(FOB)	USA(36%) Australia(26%) New Zealand(19%)	The USA mainly supplies French fries for the HRI sector.	Local production of potato is mainly supplied to chipping companies.
Potato flour/flakes/powder	2.1 m kilos \$1.6m(FOB)	USA(44%) Netherlands(25%) Germany(19%)	USA is preferred in terms of taste and quality but may lose its lead due to price.	Local production is mainly on potato powder and starch.
Protein concentrates	13.8 m kilos \$12.1m(FOB)	Israel(26%) USA(17%) India(16%)	Israel has been the traditional known supplier although competition from other suppliers is increasing	No domestic production.
Animal & Vegetable fats and oils and their fractions	189 m kilos \$101m(FOB)	Malaysia(70%) Indonesia(9%) USA(1%)	Proximity to Philippines and pricing compete with other markets.	Local production is mainly on cooking oil and fats from coconut and corn based products.
Yeasts, baking powder	5m kilos \$7.6m(FOB)	France(37%) China(33%) USA(1%)	Pricing competes or is sometimes lower than domestic production.	Domestic production cannot meet demand of the market.

Source: 2004 Volume and Value of Imports, Philippine National Statistics Office

IV. Best Product Prospects

The following products are already present in the market that have good sales potential:

- Wheat
- Whey
- Soybeans
- Green peas
- MDM poultry meat
- Milk powder
- Fresh and dehydrated potatoes
- Potato flakes/powder
- Tomato paste/puree
- Flavoring materials (snack, ice cream, canned or beverage)
- Food colors
- Fresh, dried, paste tree nuts
- Fresh, dried , fillings and dehydrated fruits
- Mixed fruits
- Baking ingredients (emulsifiers, stabilizers, preservative, improvers, bases, premixes)
- Dressings and spreads
- Cocoa based products
- Milk replacers
- Protein concentrates
- Pre-mixed vitamins
- Textured vegetable protein
- Fats and oils

The following are available in small quantities or are untapped and have potential for growth:

- Meat offals
- Animal by-products
- Whey powder
- Other flavorings, colors and extracts
- Egg powder
- Sugar substitutes

V. Post contact and further information

Agricultural Trade Office
Foreign Agricultural Service
U.S. Department of Agriculture
Embassy of the United States of America
25/F Ayala Life-FGU Building
6811 Ayala Avenue
Makati City 1203
Tel: (632) 894-5379/63
Fax: (632) 812-5430
Email: ATOManila@usda.gov

Annual and updated information on the following related industries and commodities as reported by the Foreign Agricultural Service in Manila can also be viewed online at www.fas.usda.gov under FAS Attache Reports:

- a. Dairy and Products
- b. Coffee
- c. Livestock and Products
- d. Sugar
- e. HRI Food Service Sector
- f. Retail Sector
- g. Philippine Exporter Guide

Regional Cooperators:

Synergy Asia Marketing Services, Inc.
(Philippine representative of **Washington Apple Commission** and the **California Table Grape Commission**)

Unit 602-C, Summit Office Tower
530 Shaw Boulevard
Mandaluyong City 1501
Metro Manila
Tel: (632) 534-8534; 534-8221; 534-8223
Fax: (632) 534-8234
Contact: Mr. Mandy Saracho, Managing Director
Email: mandys@synergyasia.com

Lieu Marketing Associates Pte Ltd
(ASEAN Representative of **California Pistachio Commission, California Tree Fruit Agreement, Florida Department of Citrus, Pear Bureau Northwest, Raisin Administrative Committee, United States Potato Board, Wine Institute of California, Western United States Agricultural Trade Association, Mid-America International Agri-Trade Council, Food Export USA-Northeast** and the Southern United States Trade Association)
Block 3 Alexandra Distripark
Unit 08-22, Pasir Panjang road
Singapore 118483
Tel: (65) 6278-3832
Fax: (65) 6278-4372
Contact: Richard Lieu
Email: richelieu@lieumktg.com.sg

Pacrim Associates Ltd.
(ASEAN Representative for **US Dairy Export Council**)
The Regent Hotel
155 Rajadamri Road
Bangkok 10330, Thailand
Tel: (662) 251-6127
Fax: (662) 254-6913
Contact: Mr. Dan Fitzgerald, ASEAN Representative
E-mail: usdec@pacrimassociates.com

USA Poultry and Egg Export Council
#15-04 Liat Towers, 541 Orchard Road
Singapore 238881
Tel: (65) 6737-1726
Fax: (65) 6737-1727
Contact: Ms. Margaret Say, ASEAN Representative
Email: usapeec_sing@pacific.net.sg

US Meat Export Federation

39 Tyrwhitt Road
3rd Floor Suite
207538, Singapore
Tel: (65) 67334255
Fax: (65) 6732-1977
Contact: Mr. Eric Choon, ASEAN Representative
Email: echoon@usmef.com.sg

AgriSource Co., Ltd.

(ASEAN rep for **USA Dry Pea & Lentil Council** and **U.S. Dry Bean Council**)

Ambassador's Court, 4th Floor, No. 416
76/1 Soi Lang Suan, Ploenchit Road
Bangkok 10330, Thailand
Tel: 011-66-2-251-8655/6, 011-66-2-251-8669 & 8772
Fax: 011-66-2-251-0390
Contact: Mr. Tim Welsh, ASEAN Representative
Email: agsource@loxinfo.co.th

US Wheat Associates

28/F Ayala-FGU Center
6811 Ayala Avenue
Makati City, Metro Manila 1203
Philippines
Tel: (632) 818-4610 , 63-2-815-4619 Main
Fax: (632) 815-4026
Contact: Mr. Mike Spier, Country Director
Email: mspier@uswheat.org / InfoManila@uswheat.org
<http://www.uswheat.org>

American Soybean Association

Unit 1408 B Robinsons-Equitable Tower
#4 ADB Ave. cor Poveda
Ortigas Center
Pasig City, MM 1605
Philippines
Tel: (632)637-5384 to 85 Main
Fax: (632) 637-5388
Contact: Mr. Teodoro M. Cortes, ASA Country Manager
Email: asatcj@mzcom.com
<http://www.asasea.com>