



Industry Forecast

The Future of Retailing in the Philippines to 2017

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1. Introduction

1.1 What is this Report About?

This report is the result of Canadean's extensive market research covering the retail industry in the Philippines. It provides detailed Sales Segmentation of historic and forecast retail sales, down to category and channel level. It also includes the business environment and country risk related to the Philippines' retail environment.

The Future of Retailing in the Philippines to 2017 provides both a top-level overview and detailed category and channel specific insights into the Philippines' retail industry environment. It is an essential tool for companies active across the Philippines' retail value chain and for new companies considering entry into the Philippines' retail market.

1.2 Definitions

All research is conducted in local currency in nominal prices. US dollar conversions for all data are made using an annual average exchange rate. For details please refer to Table 1 and Table 2 below.

1.2.1 This report provides 2012 actual sales; while forecasts are provided for 2013 – 2017

Table 1: Philippines Exchange Rate PHP–USD (Annual Average), 2007–2012

	2007	2008	2009	2010	2011	2012
PHP–USD Exchange Rate (Annual Average)						
Source: Timetric	© Canadean					

Table 2: Philippines Exchange Rate PHP–USD (Annual Average), 2013–2017 Forecasts

	2013	2014	2015	2016	2017
PHP–USD Exchange Rate (Annual Average)					
Source: Timetric	© Canadean				

The key channels and categories featured in the report are defined below

Table 3: Canadean Retail Channel Definitions

Channel Group	Channel	Definition
Value Retailers	Cash and Carries and Warehouse Clubs	Cash and carry traders sell from a wholesale warehouse to customers such as small retailers and professional users, who pay on the spot and transport the goods away themselves. Warehouse clubs are no-frills stores that sell discounted goods to members who pay an annual fee. Delivered wholesale sales are not included.
	Value, Variety Stores and General Merchandise Retailers	Value, variety stores includes all sales through stores that sell inexpensive items, especially cleaning supplies, toys and confectionery, at a single or limited number of price points, and are often named after the price of the merchandise, such as Dollar Store or Pound Store. General merchandise includes all sales through stores that offer a wider selection of primarily non-food goods at inexpensive prices.
General Retailers	Convenience Stores (including Independents) and Gas Stations	Includes all sales through stores of areas, generally less than 300 sq m, that specialize in a limited range of food and grocery products designed primarily for convenience-seeking consumers. Also includes sales in retail outlets attached to gas stations where fuel is the main revenue driver, kiosks, and newsstands. Sales through independent retail outlets are also included in this channel.
	Department Stores	Includes all sales through multi-category retailers, focusing primarily on non-grocery categories with distinct departments specializing in defined product areas. Examples include Bloomingdale's, Macy's, John Lewis, and El Corte Ingles.
	Hypermarkets, Supermarkets and Hard-Discounters	Hypermarkets and mass merchandisers include all sales through retailers, such as Walmart, with floor areas over 2,500 square meters that carry full lines of both grocery and general merchandise. Supermarkets include all sales through retailers with floor areas of 300–2,500 square meters that offer a wide, departmentalized range of groceries, and may carry some general merchandise lines; examples include Sainsbury's and Kroger. Hard Discounters include all sales through retailers that are engaged in the sale of grocery items and which have a stocking policy that focuses on a high private label share, low prices and often a relatively limited number of stock keeping units (SKUs) offered within a category. Such retailers are also known as food discounters (e.g. Lidl, Aldi).
	Vending Machines	Includes paid-for sales from all vending machines not located within a store, such as public places, workplaces, pubs and bars.
	Other General and Non-Specialist Direct Retailers	Includes other generalist retail channels not included in the categories above, such as market traders, charity stores and student union stores. This also includes sales through television shopping, door-to-door selling by non-specialist retailers, and catalogue shopping.
Specialist Retailers	Clothing, Footwear, Accessories and Luxury Goods Specialists	Includes all sales through retailers where clothing, footwear, accessories and/or luxury goods are the main footfall drivers and account for the majority of sales.
	Drug Stores and Health and Beauty Stores	Includes all sales through beauty and cosmetics specialists, drug stores, pharmacists, health stores and opticians.

Table 3: Canadean Retail Channel Definitions

Channel Group	Channel	Definition
	Duty Free Retailers	Includes all sales through airside retailers in airports or on board an aircraft or ferry. Excludes tax free purchases by tourists at conventional stores.
	Electrical and Electronics Specialists	Includes all sales through retailers where Electrical and/or electronic goods are the main footfall drivers and account for the majority of sales.
	Food and Drinks Specialists	Includes bakers, butchers, delicatessens, drinks specialists, fishmongers, greengrocers, and single category stores (e.g. stores selling only cheese, or only olives, or only honey). Tobacconists (tobacco specialists) are also included in this channel.
	Home Furniture and Homewares Retailers	Includes all sales through retailers where floor coverings, furniture and/or Homeware are the main footfall drivers and account for the majority of sales.
	Home Improvement and Gardening Supplies Retailers	Home improvement includes all sales through retailers that specialize in the sale of home improvement tools and materials, primarily aimed at consumer rather than trade needs (e.g. Home Depot, B&Q). Gardening supplies encompasses all sales through retailers that specialize in the sale of plants and related tools and products.
	Music, Video, Book, Stationery and Entertainment Software Specialists	Includes all sales through retailers where books, entertainment software, music, stationery and/or video products are the main footfall drivers and account for the majority of revenues.
	Other Specialist Retailers	Includes all sales through flower stores, gift stores, jewelers, luggage & leather retailers, and other stores that focus on one specific product or category (e.g. sunglasses stores).
Online Retailing	Overall	Includes all sales of the relevant category that take place over the Internet, irrespective of whether the vendor is a pure-play Internet company or the online offering of a real-world retailer.

Source: Canadean

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Table 4: Canadean Retail Category Definitions

Category Group	Category	Definition
Apparel, Accessories, Luggage and Leather Goods	Clothing and Footwear	Includes all footwear categories, baby clothing, toddler clothing, and active wear, casual wear, essentials, formalwear, formalwear-occasion, and outerwear for men, women, boys and girls.
	Jewelry, Watches and Accessories	Includes gold jewelry, silver jewelry and other precious jewelry like diamonds, platinum, precious stones (sapphires, emeralds and rubies), pearls (natural and cultured) and semi-precious stones (e.g. quartz, opal, topaz, amethyst, coral etc.), fashion jewelry (non-precious jewelry), hair accessories, belts, hats, gloves, scarves, sunglasses and ties, plus watches.
	Luggage and Leather Goods	Includes suitcases, travel bags, briefcases, handbags, wallets and purses.
Books, News and Stationery	Printed Media	Includes paperback, hardbound books, and books sold from internet sites like Amazon, but not e-books. Books sold to libraries are excluded. Retail sales of newspapers, periodicals, and magazines are included, but subscription copies are not.
	Stationery and Cards	Includes personal stationery products like notebooks, erasers, pencils, rulers, sharpeners, writing boards, exam boards, graph books, pencil boxes, geometry boxes, notebook covers, glue sticks, maps, paper clips and binders, pencil grippers, calculators, etc. that are sold through retail channels excluding office supplies. Cards include seasonal and every day cards.
Electrical and Electronics	Communications Equipment	Includes retail sales only of answer machines, fax machines, fixed-line telephones, mobile phone accessories and mobile phones.
	Computer Hardware and Software	Includes retail sales only of desktops and laptop computers, software, memory sticks, CD packs, hard disks and other data storage devices, computer peripherals, PDAs, organizers, calculators, and satellite navigation systems.
	Consumer Electronics	Includes CD players, DVD players and recorders, hi-fi systems, home theatres, in-car entertainment systems, portable digital audios, radios, televisions and video recorders, home use and portable games consoles.
	Household Appliances	Includes major domestic appliances (air conditioners, dishwashers, dryers, freezers, hobs and extractors, microwave ovens, refrigerators, stoves, vacuum cleaners and washing machines) plus minor domestic appliances (blenders, coffee machines, deep fryers, food processors, grills, hair products, hair trimmers, curling tongs, razors, hand-held mixers, irons, juicers, kettles, stand mixers, toasters, sun lamps and fans).
	Photographic Equipment	Includes camcorders, cameras, projectors, camera and camcorder accessories, binoculars and telescopes.
Food and Grocery	Drinks	Includes retail (not on-trade) sales of soft drinks, hot drinks and alcoholic drinks.
	Household Products	Includes retail sales only of air fresheners, bleach, dishwashing products, and furniture cleaning products, general-purpose cleaners, insecticides, paper products, scouring products, textile washing products, and toilet care products.

Table 4: Canadean Retail Category Definitions

Category Group	Category	Definition
	Packaged Food	Includes retail (not foodservice) sales of bakery and cereals, canned food, chilled food, confectionery, dairy products, dried food, frozen food, ice cream, oils and fats, sauces, dressings and condiments, savory snacks, soup, and spreads.
	Personal Care	Includes retail sales of fragrances, hair care, make-up, oral hygiene, over-the-counter healthcare, personal hygiene, and skincare and sun care. Prescription drug sales are not included.
	Tobacco	Includes retail sales of chewing tobacco, cigarettes, cigars and cigarillos, and loose tobacco (including vending machine).
	Unpackaged Food	Includes retail (not foodservice) sales of unpackaged fruit, vegetables, meat, grains, and other food categories
Furniture and Floor Coverings	Floor Coverings	Includes retail (not trade) sales of carpets, mats, rugs, carpet tiles, hard tiles, laminates, final and wood flooring.
	Furniture	Includes retail sales of domestic furniture, including bedroom furniture, dining room furniture, home office furniture, living room furniture, kitchen furniture and bathroom furniture. Does not cover contract furniture.
Home and Garden Products	Gardening and Outdoor Living	Includes garden buildings, manual and electric garden tools, garden utensils, outdoor living products (garden furniture, barbecues, ornaments), and plants and growing media (bulbs, compost, domestic fertilizer, flowering plants, seeds, shrubs and trees).
	Home Improvement	Includes retail (not trade) sales of decorating materials (paint, varnish, wall tiles, wallpaper), Electricals hardware (alarms, light fittings, plugs, switches), hardware (brackets, locks, nails, bolts, nuts, etc.), other materials (adhesive, aggregates, boards, cement, doors, window frames, glass, bricks, timber, etc.), and manual and power tools.
	Homewares	Includes retail sales of home hardware (crockery, cutlery, glassware, rubbish bins, storage, mechanical utensils and home devices e.g. scales), lamps and lampshades, textiles and soft furnishings (bathroom textiles, beddings, cushions, futons, hammocks, mattresses, table linen, furniture covers, doormats), and window dressings (blinds, curtain poles, rails, curtains, hooks).
Music, Video and Entertainment Software	Games Software	Includes retail sales of games for domestic games consoles, handheld games consoles, mobile phones and other wireless devices; and games for PC and Mac desktop computers. Online games are excluded (e.g. Second Life). Console hardware sales are excluded.
	Music and Video	Includes retail sales of prerecorded music singles, CDs, VCDs, DVDs and Blue-Ray disks, and paid downloadable music and video.
Sports and Leisure Equipment	Sports Equipment	Includes retail sales of ball sports equipment, adventure sports equipment, fishing equipment, golf equipment, racket sports equipment, winter sports equipment, and all other sports-dedicated equipment sold at retail.
	Toys and Games	Includes retail sales of action figures, activity toys, dolls, games, infant and baby toys, miniature models, plush toys, puzzles, ride-on model toys, and toy

Table 4: Canadean Retail Category Definitions

Category Group	Category	Definition
		vehicles.
Source: Canadean		© Canadean

SAMPLE PAGES

1.3 Summary Methodology

1.3.1 Overview

All data in this series of retail reports from Canadean is rigorously sourced using a comprehensive, standardized methodology. This methodology ensures that all data is thoroughly researched and cross-checked against a number of sources and validation processes. At the core of this methodology is a triangulated market sizing approach, which ensures that results from different sources and approaches, including Canadean's own industry surveys, are compared and a final consensus number between these inputs is derived. In addition, standardized processes and quality controls across the entire data collection, analysis and publication process ensure compliance and cross-checking of the data occurs at each stage of the methodology

1.3.2 The triangulated market sizing method

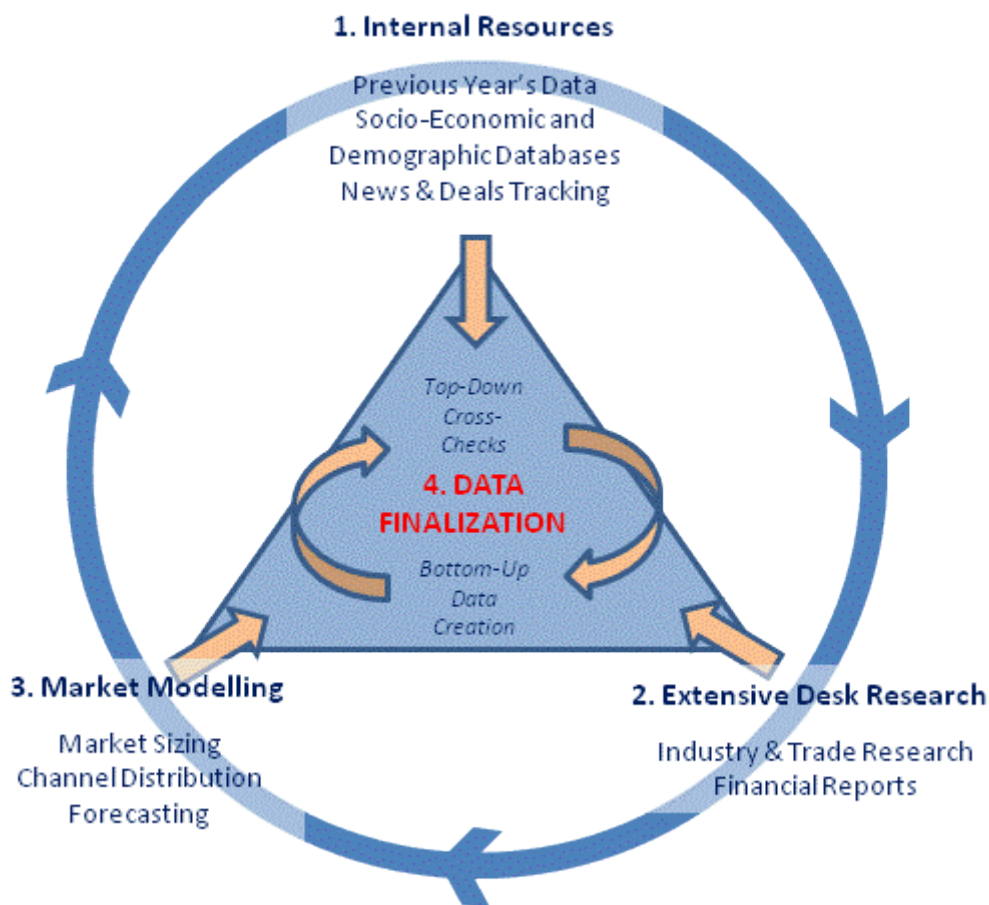
The triangulation method ensures that the results from three distinct phases of the research are brought together and cross-compared before finalized market numbers are derived:

1. **Existing internal resources:** as retail data is compiled using a rolling annual program of industry research, the first stage of producing the data is to review the existing internal information, both from the last major data release, as well as that which has been collected on an ongoing basis throughout the year. This includes inputs about market as well as individual retailer performance. These sources are then reviewed and incorporated into data collection processes and databases before the second intensive phase of desk research.
2. **Extensive desk research:** this phase of the methodology incorporates the main phase of secondary research. This research is initially conducted across a wealth of information sources, as listed below. In addition, the results of any relevant surveys from other Canadean projects are also fed into data collection sheets. Online industry surveys can include industry opinion surveys of retailers' — and their suppliers' — sentiment and consumer surveys of purchasing and retail behavior. Secondary sources include, but are not limited to, the following:
 - a. Industry surveys
 - b. Industry and trade association research
 - c. Trade portals
 - d. Company filings and analyst presentations
 - e. Broker and investment analyst reports
 - f. International organizations
 - g. Government statistics
 - h. Retail media
 - i. National Press, including both business and consumer titles

3. Market modeling: the next stage in the process is to feed the results of the above into market models, which also include drive-based forecasting tools — which analyze drivers such as disposable income, product uptake, macro-economic drivers and market momentum — in order to fill in any gaps in the data and update forecast numbers. At this stage, the market models also look to update channel distribution data sets. For example, information found at the research and trend monitoring stage on online retail sales would directly affect the channel distribution models.

4. Data finalization: the final stage of the process is the true triangulation of all the previous inputs. At this stage data is created using the inputs to hand in a bottom-up fashion, starting with the inputs from each of the previous three stages of the process for each data point to be published. This is done for all the product, channel and country combinations covered in the data. At this stage, therefore, the project analysts are constantly evaluating and deciding upon the relative merits of each of the inputs from the research processes. Once a triangulated set of data has been finalized, these outputs are then thoroughly cross-checked using a series of top-down checks which review the data against a series of reference benchmarking, including known overall retail sizes, growth trends and per-capita spending rates.

Figure 1: The Triangulated Market Sizing Methodology



Source: Canadean

© Canadean

1.3.3 Industry surveys in the creation of retail market data

Stage 2 of the above process includes using the outputs of Canadean's surveys of consumers' packaged goods consumption and industry opinion. Every year Canadean completes a large scale survey, with over 120,000 responses, covering CPG purchasing and consumption habits in 10 core retail markets around the globe. This major study, cross-referenced against primary telephone research of product market sizes by country, provides outputs against which relevant retail market data focusing on the grocery channel and core products in this channel are assessed. It should be noted that, overall, this feeds research into 3 of the 25 product categories covered. In addition, any other suitable surveys conducted by Canadean which also provide information on retail markets are also mined for information to be put into the data finalization process

1.3.4 Quality control and standardized processes

Crucial to the above methodology is the adoption of strict definitions for all products and channels, and adherence to a standardized process at each and every stage in the methodology. By following this approach all data is made cross-comparable across countries to ensure that analysis adds to the understanding of market dynamics and trends.

The key elements of this approach are:

- **Strict channel definitions:** the definition of each channel is the same in every country
- **Strict product definitions:** the definition of each product is the same in every country
- **Standardized processes**
 - **Data capture** – all data received as part of the research is captured in standardized files and in a standard format. Any workings that analysts carry out on inputs, for example to correct for misalignment in category coverage, are also covered in these sheets
 - **Data creation** – all modeling and forecasting approaches are standardized in order to ensure consistency
 - **Finalization and verification** – systematic methods and approaches are used to finalize data points
- **Country by country research structure:** all research is conducted country by country in order to ensure that market data reflects local market trends and contexts
- **Data checks during bottom-up creation:** during the data creation and finalization stage analysts refer back to initial sources and inputs in order to ensure accuracy in the data
- **Top down data audits and cross-checks:** a large series of cross-checks across all the different dimensions of the final data sets are run in order to identify any outliers or trends that do not fit with Canadean's market understanding, as well as to conduct specific analyses against set proofing criteria, such as abnormal growth rate changes, verifying data at both the overall and detailed level against research inputs and checking per capita spends against other analysis of consumers' spending in a country
- **Hierarchical review processes:** finally, all of the above processes are subject to a hierarchical review process which ensures that not only the core analysts within a team look at the data, but that at each stage data is passed through several management layers in order that queries and data review and sign-off are completed before any final data can be published

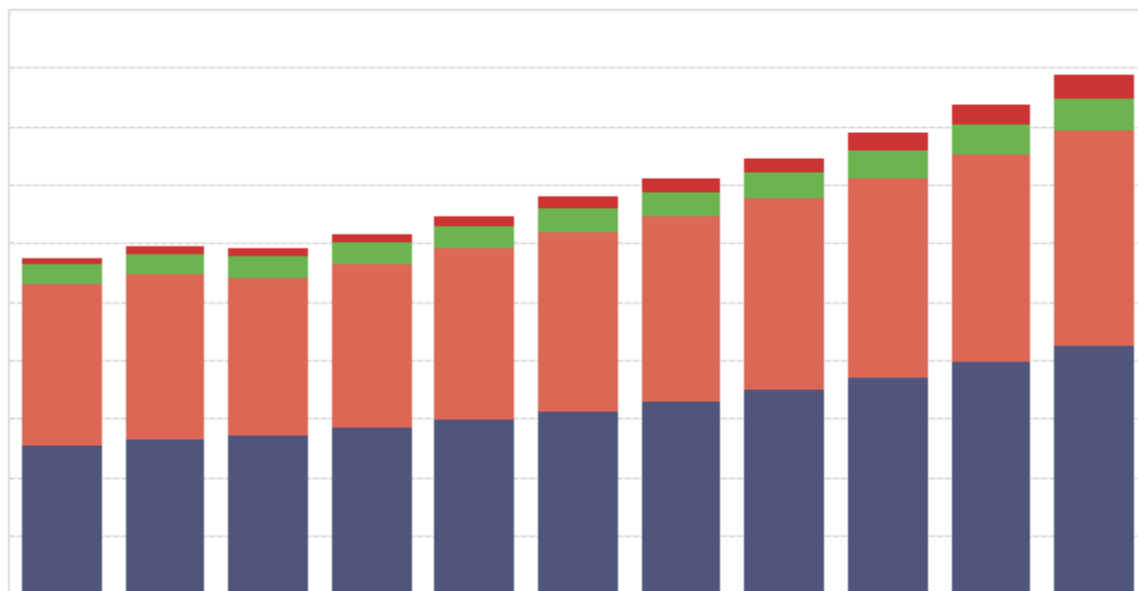
2. Philippines Retail Sales Overview

This section of the report provides an insight into the Philippines' retail sales at channel level. It considers four key channel groups: online retailers, specialist retailers, general retailers, and value retailers.

Data is presented in three ways: at overview level, by breaking down each channel group by the channels it comprises, and by breaking down each channel by the category groups that are sold through it.

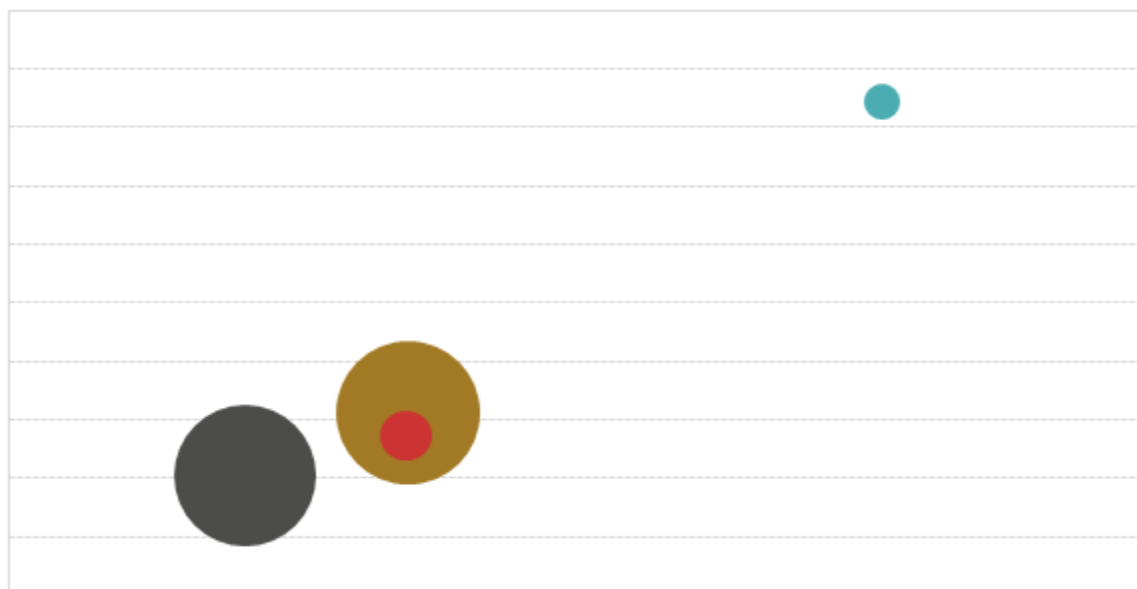
2.1 Retail Channels Overview

Figure 2: Philippines Overall Retail Sales and Forecast (PHP bn), by Channel Group, 2007–2017



Source: Canadean

© Canadean

Figure 3: Philippines Overall Retail Market Dynamics, by Channel, 2007–2017


Source: Canadean

© Canadean

Table 5: Philippines Overall Retail Sales (PHP bn), by Channel Group, 2007–2012

Channel group	2007	2008	2009	2010	2011	2012	CAGR (%) 2007 – 2012
General retailers							
Specialist retailers							
Value retailers							
Online retailers							
Overall							

Source: Canadean

© Canadean

Table 6: Philippines Overall Retail Sales Forecast (PHP bn), by Channel Group, 2012–2017

Channel group	2012	2013	2014	2015	2016	2017	CAGR (%) 2012 – 2017
General retailers							
Specialist retailers							
Value retailers							
Online retailers							
Overall							
Source: Canadean							© Canadean

Table 7: Philippines Overall Retail Sales (USD bn), by Channel Group, 2007–2012

Channel group	2007	2008	2009	2010	2011	2012	CAGR (%) 2007 – 2012
General retailers							
Specialist retailers							
Value retailers							
Online retailers							
Overall							
Source: Canadean							© Canadean

Table 8: Philippines Overall Retail Sales Forecast (USD bn), by Channel Group, 2012–2017

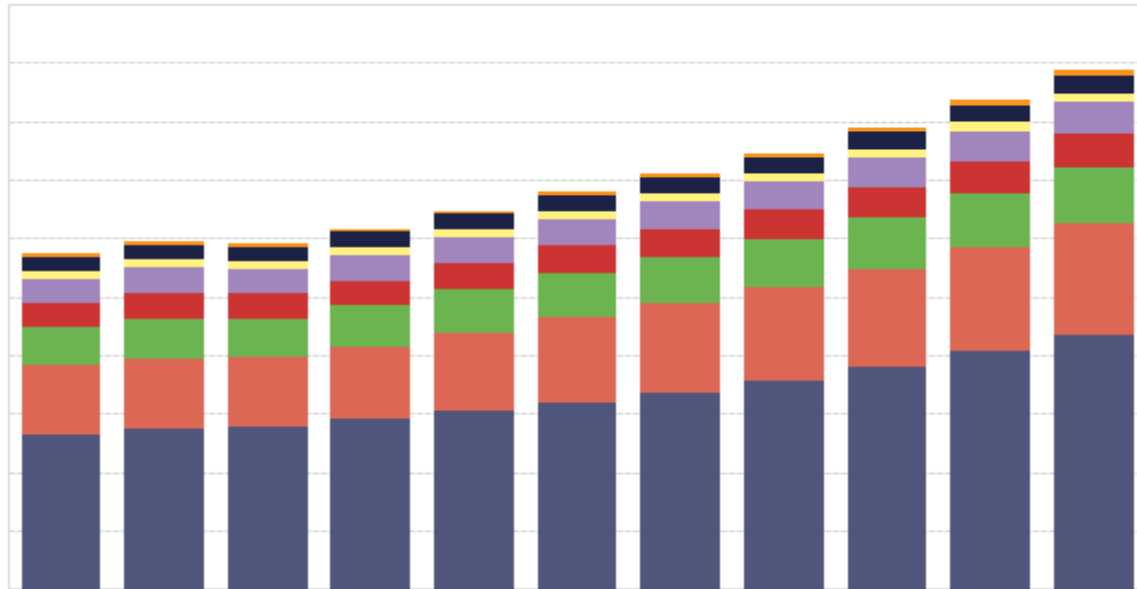
Channel group	2012	2013	2014	2015	2016	2017	CAGR (%) 2012 – 2017
General retailers							
Specialist retailers							
Value retailers							
Online retailers							
Overall							
Source: Canadean							© Canadean

Table 9: Philippines Overall Retail Sales Segmentation (% value), by Channel Group, 2007–2017

Channel group	2007	2012	2017
General retailers			
Specialist retailers			
Value retailers			
Online retailers			
Overall			
Source: Canadean			© Canadean

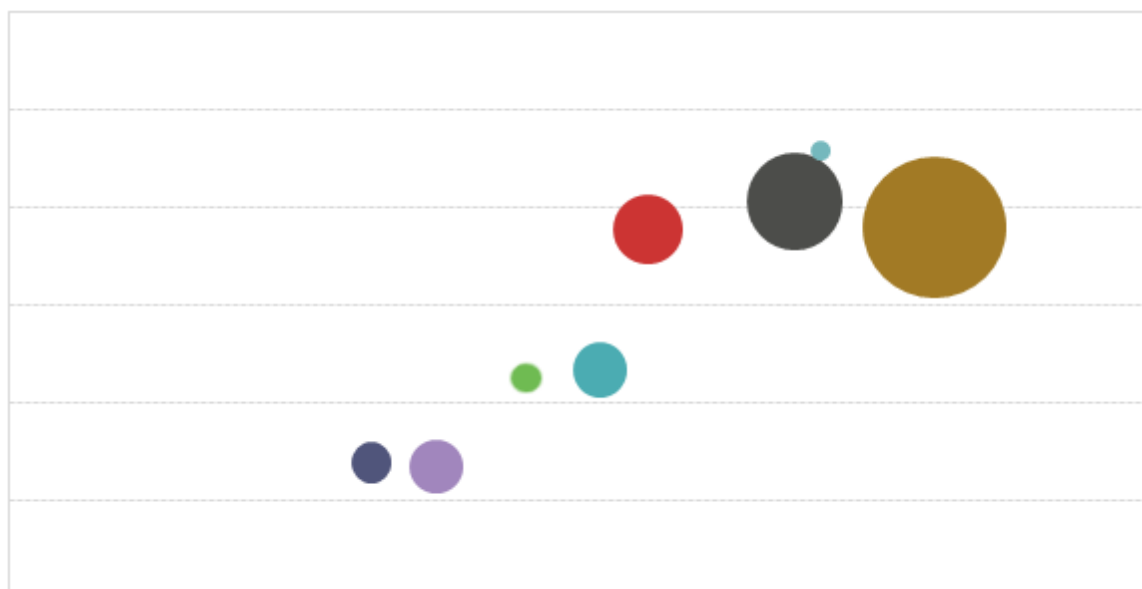
2.2 Retail Categories Overview

Figure 4: Philippines Overall Retail Sales and Forecast (PHP bn), by Category Group, 2007–2017



Source: Canadean

© Canadean

Figure 5: Philippines Overall Retail Market Dynamics, by Category, 2007–2017


Source: Canadean

© Canadean

Table 10: Philippines Overall Retail Sales (PHP bn), by Category Group, 2007–2012

Category group	2007	2008	2009	2010	2011	2012	CAGR (%) 2007 – 2012
Food and grocery							
Apparel, accessories, luggage and leather goods							
Electrical and electronics							
Home and garden products							
Furniture and floor coverings							
Sports and leisure equipment							
Books, news and stationery							
Music, video and entertainment software							
Overall							

Source: Canadean

© Canadean

Table 11: Philippines Overall Retail Sales Forecast (PHP bn), by Category Group, 2012–2017							
Category group	2012	2013	2014	2015	2016	2017	CAGR (%) 2012 – 2017
Food and grocery							
Apparel, accessories, luggage and leather goods							
Electrical and electronics							
Home and garden products							
Furniture and floor coverings							
Sports and leisure equipment							
Books, news and stationery							
Music, video and entertainment software							
Overall							
Source: Canadean				© Canadean			

Table 12: Philippines Overall Retail Sales (USD bn), by Category Group, 2007–2012							
Category group	2007	2008	2009	2010	2011	2012	CAGR (%) 2007 – 2012
Food and grocery							
Apparel, accessories, luggage and leather goods							
Electrical and electronics							
Home and garden products							
Furniture and floor coverings							
Sports and leisure equipment							
Books, news and stationery							
Music, video and entertainment software							
Overall							
Source: Canadean				© Canadean			

Table 13: Philippines Overall Retail Sales Forecast (USD bn), by Category Group, 2012–2017

Category group	2012	2013	2014	2015	2016	2017	CAGR (%) 2012 – 2017
Food and grocery							
Apparel, accessories, luggage and leather goods							
Electrical and electronics							
Home and garden products							
Furniture and floor coverings							
Sports and leisure equipment							
Books, news and stationery							
Music, video and entertainment software							
Overall							
Source: Canadean							© Canadean

Table 14: Philippines Overall Retail Sales Segmentation (% value), by Category Group, 2007–2017

Category group	2007	2012	2017
Food and grocery			
Apparel, accessories, luggage and leather goods			
Electrical and electronics			
Home and garden products			
Furniture and floor coverings			
Sports and leisure equipment			
Books, news and stationery			
Music, video and entertainment software			
Overall			
Source: Canadean	© Canadean		

3. Appendix

3.1 About Canadean

Canadean is a full-service business information provider with in-house market research capabilities. We specialize in analysis across the Consumer Markets Value Chain, covering suppliers, producers, distribution and consumers.

Canadean's dedicated research and analysis teams consist of experienced professionals with an industry background in marketing, market research, consulting and advanced statistical expertise. We offer value-added market research, insight and strategic analysis and our products help companies to make better, more informed, strategic and tactical sales and marketing decisions.

Canadean's areas of expertise include online research, qualitative and quantitative research, industry analysis, custom approaches, and actionable insights. In addition Canadean has built a network of consultants and specialist researchers across more than 60 countries, each with in-depth industry experience and expertise enabling us to conduct unique and insightful research via our trusted business communities.

3.2 Disclaimer

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