Market Focus: Trends and Developments in the Dairy Food Sector in Philippines

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The Philippines Dairy market has moderate private label penetration with high growth opportunities.

The presence of a large number of brands is limiting the success of Private Labels in the Philippines. The Dairy Food market is concentrated among national and multinational companies. Leading multinationals such as Nestle, Fonterra and, Alaska Milk Corporation, dominate the Philippines Dairy industry.

Private Label penetration is moderate in the Dairy Food market, accounting for around X.X% of the overall market by value. Private Label share in the Philippines Dairy Food market is similar among all categories. Private label penetration is highest in the Milk category, with a market share of X.X% while the Cheese category had the lowest penetration with an overall market share of X.X%. The market is highly price sensitive and consumers seek better value for money products which will result in the demand of private labels in future. Moreover, the Filipino market is dominated by imported brands, so slight increases in the import prices can shift the consumers interest towards private labels.
Hypermarkets & Supermarkets will continue to constitute the largest share of food sales

Modern grocery retailing is expected to grow in the future, while traditional independent retailers sales will decline. The expansion of modern retailing can be attributed to higher per capita disposable income, increasing urbanization, and increasing consumer desire for one-stop shopping. As a result traditional grocery retailers are losing market share to modern stores.

**Leading Retailers**

**SM**
SM Supermarket is the most dominant player in the Philippines food retail industry, operating around XXX stores including hypermarkets, supermarkets, and convenience stores.

**The Robinsons Retail Group**
The Robinsons Retail Group is the second largest multi-channel retailer in the Philippines. Robinsons has XX formats, XX retail brands, and operates around XXX stores in the country.

**Rustan Supercenters, Inc.**
Rustan is one of the largest diversified retailers in the Philippines. Rustan Supercenters, Inc. is the operator of Rustan’s Supermarkets, and the Shopwise and Wellcome chains of hypermarkets.

**Metro**
Metro is a private family corporation primarily engaged in the retail business. It owns and operates a chain of department stores and supermarkets popularly known as Metro.

**Food Distribution**

Dairy Food accounted for X.X% of Food retail sales in the country in 2013.

During 2010-2013, Hypermarkets & Supermarkets remained consumers preferred retail formats for food, with a X.X% market share in 2013.