

Market brief

Philippines

Financial year 2023/24

Global exports to Philippines

Rank #4 in the global dairy market (by volume).

Destination for over 700,000 tonnes of dairy product, worth over US\$1.4 billion (in 2023/24).

Exports to Philippines have increased by 8% over five years (2019/20–2023/24).

The biggest volume growth (product categories exceeding US\$20 million) has been in:

- Yogurt (74%)
- Milk (50%)
- Buttermilk Powder (36%).

The biggest volume decline (product categories exceeding US\$20 million) has been in:

- Whole Milk Powder (–49%)
- Butter Oil (–38%)
- Ice Cream (–16%).

Australian market share

Rank #5 in the share of Philippines import volume.

Destination for over 38,000 tonnes of Australian dairy product, worth US\$73 million (in 2023/24).

Exports to Philippines have increased by 14% over five years (2019/20 – 2023/24).

The biggest volume growth (product categories exceeding US\$1 million) has been in:

- Condensed Milk (1589%)
- Buttermilk Powder (129%)
- Milk (53%).

The biggest volume decline (product categories exceeding US\$1 million) has been in:

- Skim Milk Powder (–72%)
- Whey Powder (–38%).

Tariff environment

Australia and the Philippines are both party to the multilateral ASEAN, Australia, New Zealand, Free Trade Agreement (AANZFTA). The agreement came into force in January 1st, 2010, with a reduction in tariffs for almost all dairy products. Since 2020, these tariffs have now been removed. A schedule of Philippine tariffs can be found in Table 2.

Key international marketing programs and activities

Dairy Australia runs or is involved in a number of marketing programs and activities in the Philippines. These include the Southeast Asia Dairy Scholarship program aimed at familiarising dairy and food industry professionals from the region with aspects of the Australia dairy industry and the Southeast Asian Alumni Program for past scholars. Outside of COVID-19 travel restrictions, Dairy Australia aims to regularly visit the Philippines and present seminars to local industry players in key markets.

Figure 1 Dairy imports

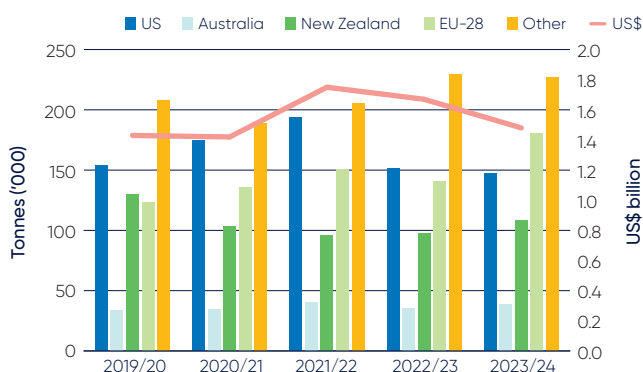


Figure 2 Top dairy exports to Phillippines by volume

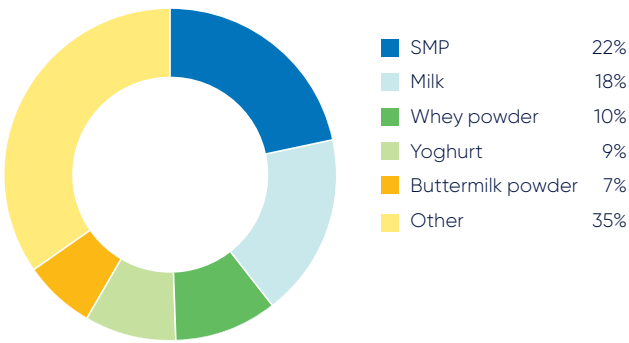


Figure 4 Top Australian dairy exports by volume

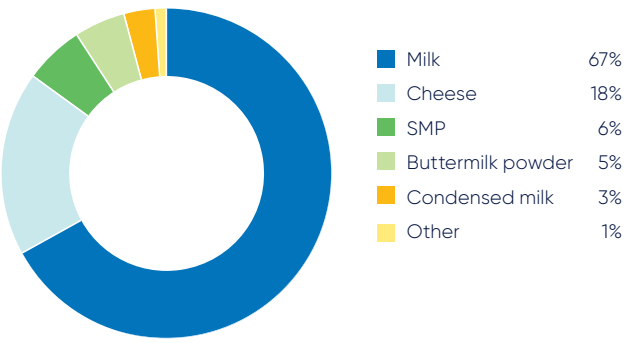


Figure 3 Top dairy exports to Phillippines by US\$ value

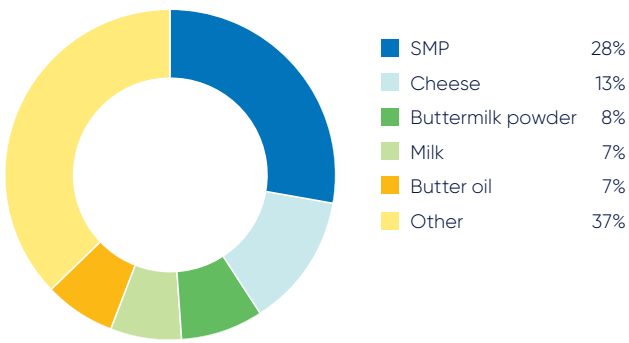


Figure 5 Top Australian dairy exports by US\$ value

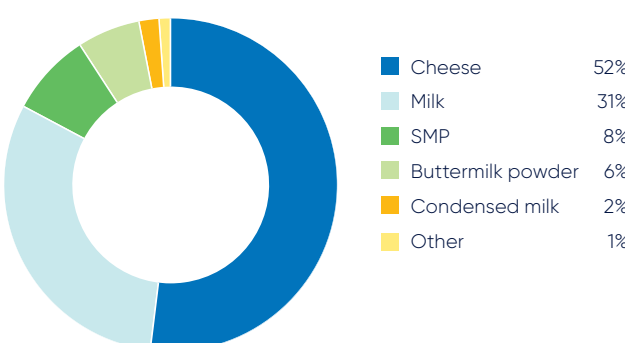


Table 1 Australia exports

Product group	Market share (US\$ %)		Volume ('000)		Value (million US\$)	
	2019/2020	2023/2024	2019/2020	2023/2024	2019/2020	2023/2024
Milk	19	20	16.64	25.45	12.11	22.32
Cheese	20	19	6.60	6.69	27.98	37.06
SMP	5	1	7.86	2.23	19.42	6.09
Buttermilk Powder	2	4	0.80	1.83	1.86	3.96
Condensed Milk	1	10	0.06	1.02	0.06	1.25
Total imports	5	5	33.6	38.2	66.6	73.9

Further information

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