



## เรื่องดีเพื่อสุขภาพ: ผลิตภัณฑ์ที่มีศักยภาพทางการค้าในฟิลิปปินส์

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### บทคัดย่อ

จากการสำรวจสภาพเศรษฐกิจและค่า GDP ของฟิลิปปินส์มีการขยายตัวอย่างต่อเนื่องติดต่อกันหลายปี ทำให้ตลาดของฟิลิปปินส์ยิ่งใหญ่อันดับที่สองของกลุ่มอาเซียน ประชากรส่วนใหญ่อยู่ในวัยหนุ่มสาวทำให้มีความต้องการบริโภคสินค้าอาหารค่อนข้างสูง สินค้าที่มีศักยภาพทางการค้าในประเทศฟิลิปปินส์จึงเป็นสินค้าจำพวกอาหารและเครื่องดื่ม ประเทศฟิลิปปินส์มีนโยบายที่เอื้อต่อการเข้าไปลงทุนจากต่างประเทศ โดยรัฐบาลฟิลิปปินส์พยายามที่จะปรับเปลี่ยนกฎหมายต่างๆ เพื่อดึงดูดนักลงทุนจากต่างประเทศ ฟิลิปปินส์เป็นหนึ่งในประเทศในอาเซียนที่มีแนวโน้มการเติบโตทางเศรษฐกิจอย่างต่อเนื่องทำให้ถูกขนานนามว่าเป็น miracle of Asia และมีความเป็นไปได้ที่ในอนาคตอาจจะเติบโตไปมากกว่าปัจจุบัน หลังจากเหตุการณ์การแพร่ระบาดของ Covid-19 ทำให้ชาวฟิลิปปินส์ค่อนข้างมีความวิตกกังวลและความตื่นตระหนกจากสถานการณ์การแพร่ระบาดมากๆ เมื่อเทียบกับประเทศอื่นๆ ส่งผลให้รัฐบาลมองเห็นถึงความสำคัญต่อสุขภาพของประชาชนโดยมีการกำหนดโภชนาการเบื้องต้นในแต่ละวัน ส่งผลให้ประชาชนหันมาสนใจอาหารและเครื่องดื่มสุขภาพกันมากขึ้น เพื่อให้ธุรกิจการส่งออกสินค้าของไทยตอบสนองต่อผู้บริโภคมากที่สุด เราจึงทำการศึกษาหาข้อมูลและวิเคราะห์ตลาดอาหารและเครื่องดื่มเพื่อสุขภาพในฟิลิปปินส์ที่กำลังเป็นกระแสระดับโลก เพื่อเพิ่มโอกาสทางการค้าและขยายช่องทางการทำธุรกิจระหว่างประเทศไทยและฟิลิปปินส์ให้มากขึ้น ไทยและฟิลิปปินส์ต่างก็เป็นสมาชิกในกลุ่มอาเซียนและมีความสัมพันธ์ที่ตื้นตันมานาน อาเซียนมีนโยบายส่งเสริมเขตการค้าเสรี หรือที่เรียกกันว่า AFTA นโยบายการค้าเสรีเป็นนโยบายส่งเสริมการค้าระหว่างประเทศของกลุ่มอาเซียนให้สมาชิกในกลุ่มหันมาทำธุรกิจร่วมกันมากขึ้น

คำสำคัญ: ส่งออก เครื่องดื่มเพื่อสุขภาพ ฟิลิปปินส์



## Healthy Drink: Products with Commercial Potential in the Philippines

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### Abstract

According to the survey, the economy and GDP of the Philippines have been growing continuously for many years. This makes the Philippine market still the second largest in the ASEAN group. Most of the population is young. Therefore, the demand for food products is relatively high. Products with commercial potential in the Philippines are food and beverage products. The Philippines has a policy that is conducive to foreign investment. The Philippine government is trying to change the laws to attract foreign investors. The Philippines is one of the ASEAN countries whose economic growth continues and has been dubbed the miracle of Asia, and there is a possibility that in the future, it may grow even more than it is now. After the outbreak of Covid-19, Filipinos are pretty worried and stressed by the epidemic compared to other countries; as a result, the government sees the importance of public health by prescribing essential nutrition daily. As a result, people are increasingly interested in healthy food and beverages for Thai export businesses to respond to consumers as much as possible. We, therefore, conducted a review and analyzed the global health food and beverage market in the Philippines. To increase trade opportunities and expand business channels between Thailand and the Philippines. Thailand and the Philippines are members of ASEAN and have a long-standing relationship. ASEAN has a policy to promote free trade area. Also known as AFTA, the free trade policy is a policy to promote trade between ASEAN countries, allowing members of the group to do more business together.

**Keywords:** Export, Healthy drink, The Philippines

### 1. Introduction

The Philippines is one of the ASEAN members whose economy has steadily recovered after a prolonged political crisis and corruption. However, due to the current government's economic and social policies, the Philippines has stepped up to the forefront, with GDP continuously expanding the economy for many years until the World Bank dubbed the "Miracle of Asia" Philippines. Therefore, it is an exciting market that should enter the business. In addition, according to Boontiwa Boonjorn [1], the Philippine's ease of doing business ranked 95th in 2015. The Philippine government is trying to improve the disadvantages comparison in doing business in the country, including procedures to persuade foreign people



in business to invest more in the country. In 2021, the Philippine Senate recently approved a draft amendment to the Retail Trade Liberalization Act (RTLTA), or Senate Bill 1840:SB, by adjusting the paid-up capital threshold. As low as \$2.5 million to \$1 million for foreign retail businesses to open up more business opportunities. In addition, ADB's latest Asian Economic Outlook report forecasts that the Philippines economy will grow 6.0% in 2022 [2].

The population of the Philippines is about 107.7 million people, and it is the 12th most populous country in the world, with an annual growth rate of 1.8 percent. The high-income population is about 15.9 percent of the total population or about 17 million people. 26.5% with an income below 16,800 pesos per year, or about 28 million people (out of 107.7 million people), and the rest are middle-income people, approximately 62.7 million people. According to the Department of International Trade Promotion, it is making the Philippines a big market to watch [1].

According to Boontiwa Boonjorn [1], the Philippines has an archipelago landscape but the efficiency of the production process is relatively low. The Philippines must import potential products Investments from abroad such as canned tuna, vegetable-processing Fruits, canned seafood, noodles, condiments, vegetable oils, and health drinks. The Philippines still lacks essential infrastructure such as roads, ports, bridges, and irrigation systems that still have to be. There are many more under construction. The Philippines continues to face natural disasters. Therefore, it is an opportunity to invest.

## 2. Information and trade opportunities with the Philippines

### 2.1 Population

The Philippines is the second largest market among ASEAN member countries. Most of the population is young people, about 62 percent (age 15-64), while the elderly account for only 4 percent Information from the Department of International Trade Promotion Ministry of Commerce, making the Philippines have a very high demand for food products [1]. In addition, the Philippines has the highest birth rate among the 10 ASEAN countries, where the average birth rate is more than three births per family. Some people in the country still do not support the use of contraceptives because contraception is contrary to religious principles. It is expected that the population will continue to grow continuously in the future [3, 4].

**Table 1** Classification of the Philippine population by age [5]

Age	Parts of age	Amount of people	Percentage of population
0-14	Child	34.6	34.6%
15-64	Working	61.1	61.1%
65+	Old	4.3	4.3%

The Philippines has a population below the poverty line (Below Poverty Line), about 24.7 percent. In all, there were few people in good standing, and the literacy rate of the population was 95.4 percent.

## 2.2 Geography and Location

Information from the Department of International Trade Promotion, DITP, said The Philippines is geographically located between 116° 40' and 126° 34' east longitude and between 4° 40' and 21° 10' north latitude, bordering the Philippine Sea to the east: The South China Sea west and the Celebes Sea in the south, The Philippines is also located in a typhoon zone. It has to face catastrophic problems related to typhoons yearly in the Philippines. The Philippines experienced a massive typhoon last year between July and October. Unfortunately, the country is hit by an average of 19 typhoon zones each year, resulting in severe crop damage and natural disasters. This situation poses a challenge to producing enough food to meet the high level of domestic consumption. Additionally, public utilities such as roads are significantly damaged, requiring regular repairs to ensure they remain usable [5].

## 2.3 Consumer Behavior

### 2.3.1 Food and beverage consumer behavior in ASEAN

Research conducted by K-SME analysis has discovered that the behaviors of ASEAN consumers are heavily influenced by their economic and social conditions and unique consumption culture. The ASEAN beverage and food market value reached a staggering 61,949 million US dollars in 2016, with an average growth rate of 4.8% according to [6]. Most consumers belong to the middle-class bracket, indicating that they prioritize maintaining a healthy diet over the cost of their consumption. This has increased demand for healthy fast-food products, functional ready-to-drink beverages, and healthy alcoholic beverages.

Furthermore, consumers residing in urban areas are leading a fast-paced and demanding lifestyle, which has fueled the need for food and drinks that cater to the modern way of life, including those adhering to religious beliefs [6].

### 2.3.2 Behavior of Food and Beverage Consumers in the Philippines

The Filipino culture is characterized by an open-mindedness towards new experiences and a preference for top-notch products that are reasonably priced. Thai products are trendy due to their quality and affordability [7]. Filipinos have a penchant for imported goods and choose cheaper options, regardless of the product's size. Additionally, brand recognition is highly valued, and advertising and public relations play a crucial role in influencing their purchasing decisions. Since most Filipinos are of working age and lead a fast-paced lifestyle, products must be high quality and readily consumable. The government of the Philippines has put in place measures to support the well-being and fitness of its people by enacting policies that promote the intake of healthy items. An additional tax has been imposed on sugary beverages to discourage their consumption [4]. Filipinos relish delicious food and savor meals five times daily - breakfast, lunch, dinner, and snacks. Additionally [5], they cherish a vibrant social life and participate in yearly celebrations and gatherings. This consumer behavior offers a promising chance for Thai business owners to provide products that cater to their demands and tastes [4].



## 2.4 Supportive policies

Thailand and the Philippines are members of ASEAN. Therefore, there is a commitment to move towards the ASEAN Economic Community (AEC) at the end of 2015. The former member states, including the Philippines, must reduce all import taxes in the tax reduction account (Inclusive List) to 0 percent. Within January 1, 2010, except for sensitive products (Sensitive List) and susceptible products (Highly Sensitive List). The Philippines has seven groups of sensitive products, 64 items. There are two easy products, namely rice, and sugar. Non-tariff measures include sanitary measures and efforts to prohibit / permit/control import product standards and labels. However, compared to many products outside the region, they still have to pay 3-40 percent tax [1]. Information from Commerce Scholars Department of International Trade Promotion: The Philippine government announced a tax on sugary drinks in 2018, imposing a surcharge of 6 pesos per 1 liter of beverage, making the Filipino people aware of the dangers of consumption. Drinks that contain large amounts of sugar can affect your health, causing many diseases such as diabetes, and obesity, forcing entrepreneurs to try to Develop, improve and introduce new products. They have health benefits such as No Sugar or with Vitamin C [8].

## 2.5 Supporting agencies

In the Philippines, the AEC Business Support Center Philippines (AEC Business Support Center, Philippines) supports and provides information on the Philippine market so that we can strategize and decide to export products to be sold in the Philippines, such as the primary macroeconomic data of the Philippines. Thailand-Philippines import-export statistics Market Insights list of products in the Philippines Guidelines for doing business/investing in the Philippines, Trade fair information in the Philippines, etc from [4].

## 3. The beverage market in the Philippines

The beverage market in the Philippines is a large and growing industry. In 2018, it was valued at \$2.9 billion and has since grown by 16.0% compared to 2017, adding a value of \$2.5 billion. Information from the DITP Department International Trade Promotion Ministry of Commerce, Royal Thai Government shows that the market can be divided into two segments: alcoholic beverages, such as wine, beer, spirits, brandy, whiskey, and vodka, and non-alcoholic beverages, which include drinking water, soft drinks, fruit juices, tea, coffee, hot beverages, and cold drinks [8].



Figure 1 Value Added in Philippine Beverage Industry 2014 – 2018 [8]

Soft drinks are trendy in the Philippines, with a significant market demand for non-alcoholic beverages. The country's urban areas, home to 47.5 percent of the population, provide consumers with various products. The steady growth of this market can be attributed to increasing income levels in the country. Furthermore, implementing a sin tax on alcoholic drinks in 2013 expanded the non-alcoholic beverage industry. The distribution of non-alcoholic drinks can be classified into two categories within the country according to [8]. The distribution of non-alcoholic beverages in the Philippines can be divided into two types:

- (1) Distribution to consumers to buy back home, known as Off-Trade, accounted for 70%.
- (2) Distribution for consumers to drink in the shop, or called On-Trade, accounting for 30%.

### 3.1 Sales of non-alcoholic beverages

The non-alcoholic beverage market in the Philippines continues to expand. In 2014, the total sales of non-alcoholic beverages, both On-Trade and Off-Trade, amounted to 305,365.1 million pesos, and in 2018, the value increased. It was increased to 442,926.4 million pesos or an increase of 45.05 percent. In 2019, non-alcoholic beverage sales were valued at 461,970.7 million pesos, an increase of 4.30 percent from 2018, divided into On- Trade amounted to 139,399 million pesos and off-trade sales amounted to 322,571.7 million pesos. According to data from Euromonitor International in December 2019 from [8].



Figure 2 Chart 4 Non-alcoholic beverage sales in 2014 – 2019 [8]

When considering the total sales of non-alcoholic beverages by type in 2019, it was found that carbonates had the highest sales of 221,462.3 million pesos, accounting for 47.94 percent of total non-alcoholic beverage sales. Followed by Bottled water was 99,926.6 million pesos (21.63 percent), fruit juice was 55,726 million pesos (12.06 percent), and flavored beverages were 31,794.1 million pesos (6.88 percent). According to DITP's Philippine beverage market forecast data [8].

**Table 2** Non-alcoholic beverage sales by category in 2019 [8]

Type	Off-trade	On-trade	total
Carbonates	172,167.8	49,294.5	221,462.3
Bottled Water	43,212.8	56,713.8	99,926.6
Juice	33,505.7	22,220.3	55,726.0
Concentrates	31,794.1	-	31,794.1
RTD Tea	16,378.0	6,783.5	23,161.5
Energy Drinks	12,716.5	4,370.0	17,086.5
Sports Drinks	9,665.1	16.8	9,681.9
RTD Coffee	3,131.7	-	3,131.7
Total Soft Drinks	322,571.7	139,399.0	461,970.7

### 3.2 Non-alcoholic beverage sales forecast for 2020-2024

The non-alcoholic beverage market in the Philippines is expected to expand over the next five years, with sales expected to increase to P475,769.1 million in 2020 from P461,970.7 million in 2019. Moreover, it will grow to 550,331.8 million pesos in 2024, or an increase of 19.13 percent from 2019. According to data from Euromonitor International in December 2019 [8].

**Figure 3** Forecast of non-alcoholic beverage sales in 2020-2024 [8]

### 3.3 Non-alcoholic beverage market trends

The Philippine government announced a tax on sweetened beverages in 2018, with a levy of 6 pesos per liter of liquid (except for sensitive products such as alcohol), milk, and instant coffee, which may affect the cost of living of low-income earners), such taxation increases the price of sugar-based beverages. Negatively affect the sales of non-alcoholic beverages, however. The trend of alcohol sales growth in 2019 shows that Filipino producers and consumers can slowly adapt to rising product prices. Moreover, it is expected to be able to grow a lot in the future, both off-trade and on-trade channels, due to the growing economy of the Philippines and the growth rate. Ultimately, on-trade sales of non-alcoholic beverages are expected to grow stronger than off-trade channels due to the number of restaurants, pubs, and bars in the Philippines. It's essential to educate the people of the Philippines about the health risks of consuming



sugary drinks in large quantities. These drinks can lead to diabetes, obesity, heart disease, and cerebrovascular disease. To tackle this problem, companies are launching new products such as “No Sugar Added” or “with Vitamin C” beverages. One example is Zest-O Corp, which has released a fruit drink labeled “No Sugar Added” which has led to a notable increase in the market. However, as consumers' income rises, their eating and drinking habits change, and they may opt for different options and become more health-conscious when purchasing food and drinks [8].

The small-size packaged beverage trend is more popular than the large. Due to the taxation policy on sweetened beverages, the price of drinks is higher. This causes health-conscious consumers to buy smaller beverages when they want to consume sweetened beverages with the same taste but with reduced sugar content, including smaller package sizes that can meet the needs of convenience and portability on the journey. In response to consumer demand, manufacturers have successfully adapted their packaging sizes. Coca-Cola, for example, has shifted to producing the largest size of 1.5 liters after the 2018 tax on sweetened beverages. Similarly, Nestle Philippines has met this trend head-on by introducing a 6.5g version of their Nestea and Nesfruta drink, which can be transformed into a 250ml glass from the original 25g package intended for family use [8].

### 3.4 Imports of non-alcoholic beverages from the Philippines

During 2017 - 2019, the Philippines imported an average of 142.69 non-alcoholic beverages yearly. Million USD. In 2019, the Philippines imported non-alcoholic beverages worth USD 160.22 million. An increase from 2018 with an import value of US \$ 147.95 million. Or an increase of 8.29 percent for 2020 (January-April) with an import value of US \$ 38.71 million. Decreased from the same period last year with an import value of US\$ 53.07 million. Or a decrease of 27.06 percent, with the number 1 import source being Thailand, accounting for 62.29 percent, followed by Vietnam (12.34 percent), Indonesia (4.34 percent), the United States (3.90 percent), and China (3.78 percent) respectively.

**Table 3** Import values of non-alcoholic beverages (HS Code - 22012202) of the Philippines [8]

Countries	2560	2561	2562	2562 (JAN-APR)	2563 (JAN-APR)	Proportion (%)	expansion rate (YoY%)
World	119.89	147.95	160.22	53.07	38.71	100.00	-27.06
1. Thailand	76.22	90.44	99.27	32.77	24.11	62.29	-26.42
2. Vietnam	11.35	15.10	15.10	4.68	4.77	12.34	1.95
3. Indonesia	9.82	12.42	14.11	5.04	1.68	4.34	-66.62
4. USA	4.57	4.93	5.16	2.13	1.51	3.90	-29.13
5. China	2.72	9.07	5.42	1.72	1.46	3.78	-15.11
6. Malaysia	2.20	2.04	2.77	0.89	0.86	2.23	-2.48
7. Netherlands	1.73	1.24	1.57	0.69	0.68	1.76	-0.96
8. South-Korea	1.20	1.48	2.45	0.66	0.63	1.64	-3.50
9. Germany	0.15	0.08	0.44	0.09	0.62	1.61	625.89
10. French	1.01	2.01	2.43	0.70	0.60	1.54	-15.35



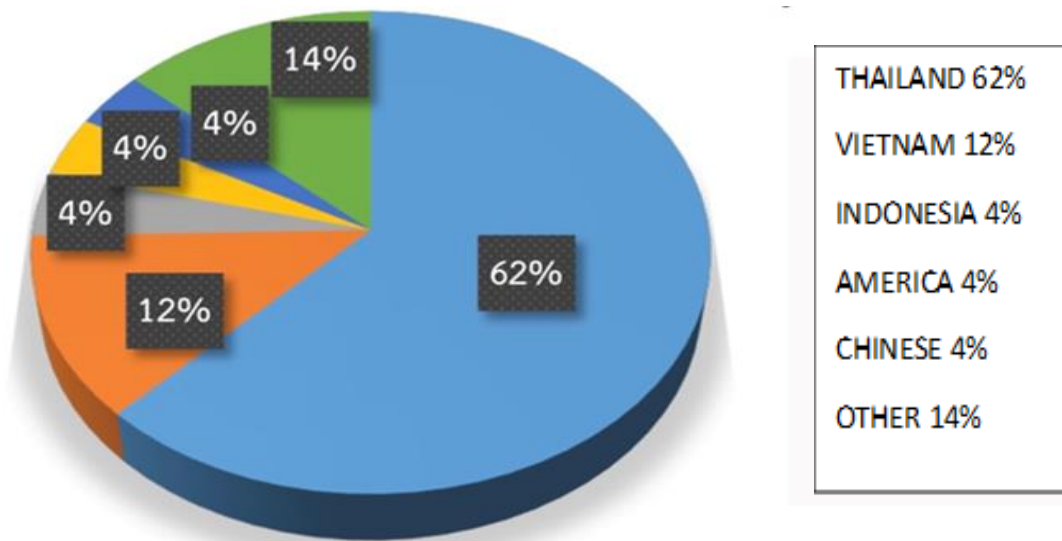


Figure 4 Chart of the Philippines' major non-alcoholic beverage importing countries [8].

### 3.5 Analyze the SWOT and risks of Thai food products in the Philippines.

#### 3.5.1 Strengths (S)

1. The food industry in Thailand is strong. Moreover, continually expanding, Thailand is one of the largest food exporters in Southeast Asia.
2. The Thai government supports the food industry in adding value to the product.
3. Thai people are meticulous about food, resulting in a variety of food and a unique identity, resulting in world-leading quality Thai food.
4. Some Thai foods have health benefits.

#### 3.5.2 Weaknesses (W)

1. The food industry in Thailand still needs to be more cohesive, meaning there are small companies in many industries. As a result, it is a limitation to development—innovation, and use of overlapping resources.
2. Thai agricultural industry needs more innovation. There are also systemic problems that may hinder the development of the food industry for export in the future.
3. The production cost of Thai food products is relatively high due to labor and domestic logistics costs.

#### 3.5.3 Opportunity (O)

1. The ASEAN Trade in Goods Agreement (ATIGA) brought import tariffs on Thai food and beverage products. Moreover, other countries in ASEAN to 0 percent (except for some products such as rice and sugar) compared to products outside the region. Many items still have to pay a 3-40 percent tax.

2. Filipino consumers begin to earn higher income from a strong economy causing consumers to start choosing quality products and utilities including starting to have a specific group of consumers with specific needs, such as herbs.

3. Filipinos have a habit of eating and trying new things and have tastes in food that are close to Thai people. (Except you do not like spicy food)

4. Development of domestic retail chains may lead to more distribution opportunities for domestic manufacturers.

#### 3.5.4 Threat (T)

1. Most Philippine consumers still use prices as the main factor in choosing

2. Large Filipino companies have a lot of capital and ownership. The market for a long time enables new entrepreneurs to penetrate the market, which can be challenging.

3. There are many competitors in the market. Furthermore, the most valuable strategies are competitive price.

4. Slow development of retail stores in the provinces Therefore, sales growth still needs to grow.

According to [5] Data from the SWOT analysis of Thai food products in the Philippines from the Department of International Trade Promotion. Ministry of Commerce and AEC business support center.

#### 4. Summary

Exporting goods or services to be distributed abroad requires a more complex documentation and marketing process than domestic sales in the short term. Shipping offers several long-term benefits that can improve a company's competitiveness. In today's globalized and free trade environment, limiting sales to only the domestic market may not be enough to provide stability. Hence, companies must adapt and create strategies to build their strengths and prepare for competition.

According to the study and analysis of the marketing of the export business to the Philippines, it was found that several external factors encourage investment and provide opportunities for foreign investors, such as the relatively low manufacturing potential of the Philippines. Combined with the technology still behind, it cannot thoroughly meet the needs of consumers with high demands. Coupled with the geographical location of the Philippines, which suffers from 19 typhoons a year, the government must regularly repair the country.

However, the world bank still recognizes the Philippines as a miracle of Asia due to its GDP and economic conditions that have been growing continuously for many years. The majority of the Philippines' population is young at 61.1 percent, and 95.4 percent of the population is literate, making the Philippines the country with the highest number of people working abroad. Because Filipinos use English to work, and the population has quite a lot of potential. Furthermore, this is another reason the Philippines' GDP is increasing yearly: Filipinos are sending money back to the country, up to 34 billion dollars in 2018 according to [9]. The beverage market in the Philippines is considered significant, growing continuously since 2014. In



2018, the Philippine beverage industry was valued at \$2.9 billion. Alternatively, a growth of 16.0% compared to the same period in 2017, when the value was added to \$ 2.5 billion. Statistics on the importation of non-alcoholic beverages during 2017-2019 Thailand was the first source of imports, accounting for 62.29%, showing a considerable opportunity in beverage exports to the country. The Philippines, in addition, also have trade channels to produce quality and various products to meet the needs of consumers; for example, healthy drinks are another production option such as “No sugar” or “with Vitamin C.” As the Philippine government increasingly recognizes the importance of public health, a policy on sugary beverages is imposed. Make people aware of the dangers of consuming large amounts of sugary drinks that can affect the health of many diseases. As a result, the Filipinos turned to love their health and pay more attention to their product choices.

Doing the export business to sell in the Philippines, we need to consider product quality; customers with potential purchases and pricing must compete with many competitors who use competitive price strategies and include most consumers who use price factors in their purchasing decisions. Since the Philippines has a lot of capital and has dominated the market for a long time, it may take much work for new investors to enter the market. The advantage of doing the food and beverage business is that Thailand's food industry is strong and continues to expand Filipino consumers also have a habit of trying new things and have similar tastes in food as Thais, including receiving support from the government. In addition, Thailand and the Philippines have traded with each other for a long time until, in 2015, an ASEAN Association was established that promotes a policy to encourage international trade called AFTA 0 % to make the most of international trade in the future from [3].

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