



Euromonitor  
International

# Edible Oils in the Philippines

December 2025

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## Edible Oils in the Philippines - Category analysis

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#### 2025 DEVELOPMENTS

Trading up and supply swings lift value, while core usage remains steady

#### INDUSTRY PERFORMANCE

Edible oils posts moderate value gains while volume remains flat in 2025

Olive oil drives overall value growth despite low volumes

#### WHAT'S NEXT?

Edible oils set for steady value growth over the forecast period

Health and wellness will remain central themes in category evolution

Policy measures around coconut oil expected to support price stabilisation

#### COMPETITIVE LANDSCAPE

San Pablo retains leadership in edible oils in 2025

Fly Ace benefits from consumer shift towards olive oil

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Supermarkets remains the primary channel for edible oils

E-commerce posts fastest growth

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Essentials, wellness cues and digital activation shape category momentum

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Rising value growth despite inflationary pressures in 2025

Olive all benefits from prevailing health trends, while meals and soups sees intensified competition from heated options

Brands invest in digitalisation and collaborations

#### WHAT'S NEXT?

Value sales will continue to rise amid uncertainty surrounding taxation measures

Health and wellness trends to remain key to development and progress

Players work to streamline operations

## COMPETITIVE LANDSCAPE

San Pablo leads through Minola oil

CJ Cheiljedang benefits from consumer interest in South Korean food

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