Passport

Retailing in the Philippines

Euromonitor International

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Channel	24-hour opening?	Monday-Thursday	Friday	Saturday	Sunday
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Source: Euromonitor International
Note: These reflect typical opening hours outside of lockdown

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MARKET DATA

Table 1 Sales in Retailing by Store-based vs Non-Store: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
Non-Store Retailing						
Retailing						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Sales in Retailing by Store-based vs Non-Store: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
Store-Based Retailing	Data removed from sample		
Non-Store Retailing			
Retailing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Sales in Store-based Retailing by Channel: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
Grocery Retailers						
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 4 Sales in Store-based Retailing by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
Grocery Retailers			
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 5 Store-based Retailing Outlets by Channel: Units 2016-2021

outlet

	2016	2017	2018	2019	2020	2021
Grocery Retailers						
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 6 Store-based Retailing Outlets by Channel: % Unit Growth 2016-2021

% unit growth

	2020/21	2016-21 CAGR	2016/21 Total
Grocery Retailers	Data removed from sample		
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.

Table 7 Sales in Non-Store Retailing by Channel: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
Direct Selling	Data removed from sample					
Homeshopping						
Vending						
E-Commerce (Goods)						
Non-Store Retailing						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.
Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 8 Sales in Non-Store Retailing by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
Direct Selling	Data removed from sample		
Homeshopping			
Vending			
E-Commerce (Goods)			
Non-Store Retailing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.
Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 9 Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 10 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 11 Sales in Grocery Retailers by Channel: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
-- Convenience Stores	Data removed from sample					
-- Discounters						
-- Forecourt Retailers						
-- Hypermarkets						
-- Supermarkets						
- Modern Grocery Retailers						
- Traditional Grocery Retailers						
Grocery Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 12 Sales in Grocery Retailers by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
-- Convenience Stores			

-- Discounters	Data removed from sample
-- Forecourt Retailers	
-- Hypermarkets	
-- Supermarkets	
- Modern Grocery Retailers	
- Traditional Grocery Retailers	
Grocery Retailers	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 13 Grocery Retailers Outlets by Channel: Units 2016-2021

outlet

	2016	2017	2018	2019	2020	2021
-- Convenience Stores	Data removed from sample					
-- Discounters						
-- Forecourt Retailers						
-- Hypermarkets						
-- Supermarkets						
- Modern Grocery Retailers						
- Traditional Grocery Retailers						
Grocery Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 14 Grocery Retailers Outlets by Channel: % Unit Growth 2016-2021

% unit growth

	2020/21	2016-21 CAGR	2016/21 Total
-- Convenience Stores	Data removed from sample		
-- Discounters			
-- Forecourt Retailers			
-- Hypermarkets			
-- Supermarkets			
- Modern Grocery Retailers			
- Traditional Grocery Retailers			
Grocery Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 15 Non-Grocery Specialists: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 16 Non-Grocery Specialists: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 17 Sales in Non-Grocery Specialists by Channel: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
- Apparel and Footwear Specialist Retailers	Data removed from sample					
- Electronics and Appliance Specialist Retailers						
- Health and Beauty Specialist Retailers						
- Home and Garden Specialist Retailers						
- Leisure and Personal Goods Specialist Retailers						
- Other Non-Grocery Specialists						
Non-Grocery Specialists						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 18 Sales in Non-Grocery Specialists by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Apparel and Footwear Specialist Retailers	Data removed from sample		
- Electronics and Appliance Specialist Retailers			
- Health and Beauty Specialist Retailers			
- Home and Garden Specialist Retailers			
- Leisure and Personal Goods Specialist Retailers			
- Other Non-Grocery Specialists			
Non-Grocery Specialists			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 19 Non-Grocery Specialists Outlets by Channel: Units 2016-2021

outlet

	2016	2017	2018	2019	2020	2021
- Apparel and Footwear Specialist Retailers						
- Electronics and Appliance Specialist Retailers						
- Health and Beauty Specialist Retailers			Data removed from sample			
- Home and Garden Specialist Retailers						
- Leisure and Personal Goods Specialist Retailers						
- Other Non-Grocery Specialists						
Non-Grocery Specialists						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Non-Grocery Specialists Outlets by Channel: % Unit Growth 2016-2021

% unit growth

	2020/21	2016-21 CAGR	2016/21 Total
- Apparel and Footwear Specialist Retailers			
- Electronics and Appliance Specialist Retailers			
- Health and Beauty Specialist Retailers		Data removed from sample	
- Home and Garden Specialist Retailers			
- Leisure and Personal Goods Specialist Retailers			
- Other Non-Grocery Specialists			
Non-Grocery Specialists			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 Mixed Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million						
Outlets			Data removed from sample			
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 22 Mixed Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 23 Sales in Mixed Retailers by Channel: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
- Department Stores	Data removed from sample					
- Mass Merchandisers						
- Variety Stores						
- Warehouse Clubs						
Mixed Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 24 Sales in Mixed Retailers by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Department Stores	Data removed from sample		
- Mass Merchandisers			
- Variety Stores			
- Warehouse Clubs			
Mixed Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 25 Mixed Retailers Outlets by Channel: Units 2016-2021

outlet

	2016	2017	2018	2019	2020	2021
- Department Stores	Data removed from sample					
- Mass Merchandisers						
- Variety Stores						
- Warehouse Clubs						
Mixed Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 26 Mixed Retailers Outlets by Channel: % Unit Growth 2016-2021

% unit growth

	2020/21	2016-21 CAGR	2016/21 Total

- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs

Mixed Retailers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 27 Retailing GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 28 Retailing GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 29 Store-based Retailing GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 30 Store-based Retailing GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 31 Store-based Retailing LBN Brand Shares: Outlets 2018-2021

sites/outlets Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 32 Non-Store Retailing GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 33 Non-Store Retailing GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 34 Grocery Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 35 Grocery Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 36 Grocery Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 37 Grocery Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 38 Non-Grocery Specialists GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 39 Non-Grocery Specialists GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 40 Non-Grocery Specialists LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 41 Non-Grocery Specialists LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 42 Mixed Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 43 Mixed Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 44 Mixed Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 45 Mixed Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 46 Forecast Sales in Retailing by Store-based vs Non-Store: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
Store-Based Retailing						
Non-Store Retailing						
Retailing						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 47 Forecast Sales in Retailing by Store-based vs Non-Store: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
Store-Based Retailing	Data removed from sample		
Non-Store Retailing			
Retailing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 48 Forecast Sales in Store-based Retailing by Channel: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
Grocery Retailers	Data removed from sample					
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Forecast value data in constant terms.
Note 2: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
Note 3: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.
Note 4: No forecast data available for luxury and off-price retailing.

Table 49 Forecast Sales in Store-based Retailing by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
Grocery Retailers	Data removed from sample		
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.
Note 3: No forecast data available for luxury and off-price retailing.

Table 50 Forecast Store-based Retailing Outlets by Channel: Units 2021-2026

outlet

	2021	2022	2023	2024	2025	2026
Grocery Retailers	Data removed from sample					
Non-Grocery Specialists						
Mixed Retailers						
Luxury Retailing						
Off-Price Retailing						
Store-Based Retailing						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
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Note 3: No forecast data available for luxury and off-price retailing.

Table 51 Forecast Store-Based Retailing Outlets by Channel: % Unit Growth 2021-2026

% unit growth

	2021/22	2021-26 CAGR	2021/26 Total
Grocery Retailers	Data removed from sample		
Non-Grocery Specialists			
Mixed Retailers			
Luxury Retailing			
Off-Price Retailing			
Store-Based Retailing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Luxury retailing not included in store-based retailing total to avoid double counting as luxury retailing is a duplicate category already accounted for within non-grocery specialists and mixed retailers.
Note 2: Off-price retailing not included in store-based retailing total to avoid double counting as off-price retailing is a duplicate category already accounted for within apparel and footwear specialists and department stores.
Note 3: No forecast data available for luxury and off-price retailing.

Table 52 Forecast Sales in Non-Store Retailing by Channel: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
Direct Selling	Data removed from sample					
Homeshopping						
Vending						
E-Commerce (Goods)						
Non-Store Retailing						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Forecast value data in constant terms.
Note 2: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.
Note 3: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 53 Forecast Sales in Non-Store Retailing by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
Direct Selling	Data removed from sample		
Homeshopping			
Vending			
E-Commerce (Goods)			
Non-Store Retailing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.
Note 2: Mobile e-commerce (goods) not included in non-store retailing total to avoid double counting as this category is already accounted for within e-commerce (goods).

Table 54 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 55 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 56 Forecast Sales in Grocery Retailers by Channel: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
-- Convenience Stores	Data removed from sample					
-- Discounters						
-- Forecourt Retailers						
-- Hypermarkets						
-- Supermarkets						
- Modern Grocery Retailers						
- Traditional Grocery						

Retailers	
Grocery Retailers	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 57 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
-- Convenience Stores	Data removed from sample		
-- Discounters			
-- Forecourt Retailers			
-- Hypermarkets			
-- Supermarkets			
- Modern Grocery Retailers			
- Traditional Grocery Retailers			
Grocery Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 58 Forecast Grocery Retailers Outlets by Channel: Units 2021-2026

outlet

	2021	2022	2023	2024	2025	2026
-- Convenience Stores	Data removed from sample					
-- Discounters						
-- Forecourt Retailers						
-- Hypermarkets						
-- Supermarkets						
- Modern Grocery Retailers						
- Traditional Grocery Retailers						
Grocery Retailers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 59 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2021-2026

% unit growth

	2021/22	2021-26 CAGR	2021/26 Total
-- Convenience Stores	Data removed from sample		
-- Discounters			
-- Forecourt Retailers			
-- Hypermarkets			
-- Supermarkets			
- Modern Grocery Retailers			
- Traditional Grocery Retailers			
Grocery Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 60 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 61 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million			
Outlets			
Selling Space '000 sq m			

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 62 Forecast Sales in Non-Grocery Specialists by Channel: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
- Apparel and Footwear Specialist Retailers						
- Electronics and Appliance Specialist Retailers						
- Health and Beauty Specialist Retailers						
- Home and Garden Specialist Retailers						
- Leisure and Personal Goods Specialist Retailers						
- Other Non-Grocery Specialists						
Non-Grocery Specialists						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 63 Forecast Sales in Non-Grocery Specialists by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Apparel and Footwear Specialist Retailers	Data removed from sample		
- Electronics and Appliance Specialist Retailers			
- Health and Beauty Specialist Retailers			
- Home and Garden Specialist Retailers			
- Leisure and Personal Goods Specialist Retailers			
- Other Non-Grocery Specialists			
Non-Grocery Specialists			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 64 Forecast Non-Grocery Specialists Outlets by Channel: Units 2021-2026

outlet

	2021	2022	2023	2024	2025	2026
- Apparel and Footwear Specialist Retailers	Data removed from sample					
- Electronics and Appliance Specialist Retailers						
- Health and Beauty Specialist Retailers						
- Home and Garden Specialist Retailers						
- Leisure and Personal Goods Specialist Retailers						
- Other Non-Grocery Specialists						
Non-Grocery Specialists						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 65 Forecast Non-Grocery Specialists Outlets by Channel: % Unit Growth 2021-2026

% unit growth

	2021/22	2021-26 CAGR	2021/26 Total
- Apparel and Footwear Specialist Retailers	Data removed from sample		
- Electronics and Appliance Specialist Retailers			
- Health and Beauty Specialist Retailers			
- Home and Garden Specialist Retailers			
- Leisure and Personal Goods Specialist Retailers			

- Other Non-Grocery Specialists	
Non-Grocery Specialists	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 66 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 67 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 68 Forecast Sales in Mixed Retailers by Channel: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
- Department Stores	Data removed from sample					
- Mass Merchandisers						
- Variety Stores						
- Warehouse Clubs						
Mixed Retailers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 69 Forecast Sales in Mixed Retailers by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Department Stores	Data removed from sample		
- Mass Merchandisers			
- Variety Stores			
- Warehouse Clubs			
Mixed Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 70 Forecast Mixed Retailers Outlets by Channel: Units 2021-2026

outlet

	2021	2022	2023	2024	2025	2026
- Department Stores	Data removed from sample					
- Mass Merchandisers						
- Variety Stores						
- Warehouse Clubs						
Mixed Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 71 Forecast Mixed Retailers Outlets by Channel: % Unit Growth 2021-2026

% unit growth

	2021/22	2021-26 CAGR	2021/26 Total
- Department Stores	Data removed from sample		
- Mass Merchandisers			
- Variety Stores			
- Warehouse Clubs			
Mixed Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 17 January 2022

Report closing date: 23 February 2022

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during research include the following:

Summary 2 Research Sources

Official Sources	Content removed from sample

	Content removed from sample
Trade Associations	
Trade Press	

Source: Euromonitor International

CONVENIENCE STORES IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Value decline continues as operating limitations prevent stronger sales

Content removed from sample

Expansion plans hampered due to COVID-19 issues

Content removed from sample

Content removed from sample

Alfamart finds new audience in underserved rural communities

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PROSPECTS AND OPPORTUNITIES

Swift recovery expected as restrictions relax and outlets reopen

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To aid recovery, category players will shift product assortments, introduce new shopping concepts, and partner with other brands

Content removed from sample

Content removed from sample

Digital payments and delivery services will continue to grow in importance

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CHANNEL DATA

Table 72 Convenience Stores: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 73 Convenience Stores: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 74 Convenience Stores GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 75 Convenience Stores GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 76 Convenience Stores LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 77 Convenience Stores LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 78 Convenience Stores Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 79 Convenience Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million			
Outlets			
Selling Space '000 sq m			

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

DISCOUNTERS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Puregold Extra remains only brand within discounters and sees decline

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PROSPECTS AND OPPORTUNITIES

Puregold will still be the main player, with A focus on outlet expansion and digital growth

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CHANNEL DATA

Table 80 Discounters: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 81 Discounters: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 82 Discounters GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 83 Discounters GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 84 Discounters LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 85 Discounters LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 86 Discounters Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 87 Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

HYPERMARKETS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Despite recording value growth in 2020, hypermarkets will see A heavy decline

Content removed from sample

SM Hypermarket benefits from helping local food producers

Content removed from sample

Puregold brands under pressure from COVID-19 but remains on top

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Slightly slower growth expected as stockpiling behaviour dwindles

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Online shopping will continue growing as players explore the digital landscape

Content removed from sample

Convenient shopping services and rebound of sari-sari stores are set to aid recovery of category sales

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CHANNEL DATA

Table 88 Hypermarkets: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 89 Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million			
Outlets			
Selling Space '000 sq m			

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 90 Hypermarkets GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 91 Hypermarkets GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 92 Hypermarkets LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 93 Hypermarkets LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 94 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 95 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million			
Outlets			
Selling Space '000 sq m			

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

SUPERMARKETS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Decline in sales as poor economic conditions restrict consumer purchases

Content removed from sample

Expansion continues with notable developments from AllDay and MerryMart

Content removed from sample

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Third-party e-commerce partnerships and shopper programs maintain popularity

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PROSPECTS AND OPPORTUNITIES

Supermarkets set for steady recovery as shopping behaviour normalises

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Online grocery expected to remain A significant contributor to sales

Content removed from sample

Dark grocery store concept has strong potential to take off

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CHANNEL DATA

Table 96 Supermarkets: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021

Value sales PHP million	Data removed from sample
Outlets	
Selling Space '000 sq m	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 97 Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 98 Supermarkets GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 99 Supermarkets GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 100 Supermarkets LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 101 Supermarkets LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 102 Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 103 Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

TRADITIONAL GROCERY RETAILERS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Modern grocery retailers expanding faster at expense of category sales

Content removed from sample

Expanding via e-commerce proves to be A challenge for traditional retailers

Content removed from sample

Traditional groceries, especially SMEs are on track to recovery

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PROSPECTS AND OPPORTUNITIES

Slow growth expected as consumers increasingly turn to modern channels

Content removed from sample

Selling space and sites/outlets set for decline

Content removed from sample

Traditional retailers will retain significant presence in smaller, rural communities

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CHANNEL DATA

Table 104 Traditional Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 105 Traditional Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 106 Traditional Grocery Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 107 Traditional Grocery Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 108 Traditional Grocery Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 109 Traditional Grocery Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 110 Traditional Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Forecast value data in constant terms.

Table 111 Traditional Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

APPAREL AND FOOTWEAR SPECIALIST RETAILERS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Another year of poor sales despite retailers adapting their product portfolios

Content removed from sample

Upper class consumers continue to spend on luxury items amidst the pandemic

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Content removed from sample

Brands adopt different strategies to cope with pandemic but not all survive

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PROSPECTS AND OPPORTUNITIES

Slow recovery expected with safety and locality to remain the main trends

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Apparel and footwear companies for different causes

Content removed from sample

Content removed from sample

Enhancing the e-commerce experience seen by apparel and footwear companies

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CHANNEL DATA

Table 112 Apparel And Footwear Specialist Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 113 Apparel And Footwear Specialist Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 114 Apparel And Footwear Specialist Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 115 Apparel And Footwear Specialist Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 116 Apparel And Footwear Specialist Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 117 Apparel And Footwear Specialist Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 118 Apparel And Footwear Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 119 Apparel And Footwear Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

ELECTRONICS AND APPLIANCE SPECIALIST RETAILERS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Continuing decline in 2021 as electronics were bought in first year of pandemic

Content removed from sample

Automatic Centre to shut down whilst XTREME Appliances continues to grow

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Content removed from sample

Financing options regain popularity due to economic instability

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Channel unlikely to make full recovery despite essential nature of many electronics and appliances

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E-commerce becoming more relevant even to electronics and appliance retailers

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Brands continue to push for growth with aggressive promotions

Content removed from sample

CHANNEL DATA

Table 120 Electronics and Appliance Specialist Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 121 Electronics and Appliance Specialist Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 122 Electronics and Appliance Specialist Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 123 Electronics and Appliance Specialist Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 124 Electronics and Appliance Specialist Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 125 Electronics and Appliance Specialist Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 126 Electronics and Appliance Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 127 Electronics and Appliance Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

HEALTH AND BEAUTY SPECIALIST RETAILERS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Health and wellness retailers see growth amid pandemic concerns

Content removed from sample

Beauty specialist retailers one of the worst hit by pandemic restrictions

Content removed from sample

Mercury Drug remains in top position whilst RRHI expands drugstores portfolio

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PROSPECTS AND OPPORTUNITIES

Continuous growth expected as heightened health-consciousness lingers

Content removed from sample

Beauty specialist retailers prospects set to depend on speed of pandemic recovery

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More partnerships expected, especially for e-commerce distribution

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CHANNEL DATA

Table 128 Health and Beauty Specialist Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 129 Health and Beauty Specialist Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 130 Sales in Health and Beauty Specialist Retailers by Channel: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
-- Beauty Specialist Retailers	Data removed from sample					
-- Chemists/Pharmacies						
-- Optical Goods Stores						
-- Drugstores/ Parapharmacies						
-- Vitamins and Dietary Supplements Specialist Retailers						
- Health and Beauty Specialist Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 131 Sales in Health and Beauty Specialist Retailers by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
-- Beauty Specialist Retailers	Data removed from sample		
-- Chemists/Pharmacies			
-- Optical Goods Stores			
-- Drugstores/Parapharmacies			
-- Vitamins and Dietary Supplements Specialist Retailers			
- Health and Beauty Specialist Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 132 Health and Beauty Specialist Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 133 Health and Beauty Specialist Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 134 Health and Beauty Specialist Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 135 Health and Beauty Specialist Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 136 Health and Beauty Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 137 Health and Beauty Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 138 Forecast Sales in Health and Beauty Specialist Retailers by Channel: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
-- Beauty Specialist Retailers	Data removed from sample					
-- Chemists/Pharmacies						
-- Optical Goods Stores						
-- Drugstores/ Parapharmacies						
-- Vitamins and Dietary Supplements Specialist Retailers						
- Health and Beauty Specialist Retailers						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 139 Forecast Sales in Health and Beauty Specialist Retailers by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
-- Beauty Specialist Retailers	Data removed from sample		
-- Chemists/Pharmacies			
-- Optical Goods Stores			
-- Drugstores/Parapharmacies			
-- Vitamins and Dietary Supplements Specialist Retailers			
- Health and Beauty Specialist Retailers			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

HOME AND GARDEN SPECIALIST RETAILERS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Category begins recovery as consumers look to make soft renovations

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Store-based growth limited because sales are increasingly completed online

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Leading brand Wilcon innovates with various strategies

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PROSPECTS AND OPPORTUNITIES

Growth to be hampered by weak consumer spending and higher construction costs

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Retailers outside key urban cities are set to grow faster

Content removed from sample

Content removed from sample

Urban gardening trend may provide new avenue for category profit

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CHANNEL DATA

Table 140 Home and Garden Specialist Retailers: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 141 Home and Garden Specialist Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million			
Outlets			
Selling Space '000 sq m			

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 142 Sales in Home and Garden Specialist Retailers by Channel: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
-- Home Improvement and Gardening Stores	Data removed from sample					
-- Homewares and Home Furnishing Stores						
- Home and Garden Specialist Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 143 Sales in Home and Garden Specialist Retailers by Channel: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
-- Home Improvement and Gardening Stores	Data removed from sample		
-- Homewares and Home Furnishing Stores			
- Home and Garden Specialist Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 144 Home and Garden Specialist Retailers GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 145 Home and Garden Specialist Retailers GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 146 Home and Garden Specialist Retailers LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 147 Home and Garden Specialist Retailers LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 148 Home and Garden Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 149 Home and Garden Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 150 Forecast Sales in Home and Garden Specialist Retailers by Channel: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
-- Home Improvement and Gardening Stores	Data removed from sample					
-- Homewares and Home Furnishing Stores						
- Home and Garden Specialist Retailers						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 151 Forecast Sales in Home and Garden Specialist Retailers by Channel: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
-- Home Improvement and Gardening Stores			
-- Homewares and Home Furnishing Stores	Data removed from sample		
- Home and Garden Specialist Retailers			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

DEPARTMENT STORES IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Stagnant growth observed for department stores in 2021

Content removed from sample

SM Department Store retains lead by adapting to consumers' changing needs

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Content removed from sample

Rise of e-commerce sales not capable of preventing overall decline

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PROSPECTS AND OPPORTUNITIES

Recovery expected, despite uncertainty about reaching pre-pandemic sales level

Content removed from sample

Personal shoppers via e-commerce set to drive channel growth as consumers continue to value premium, customised services

Content removed from sample

Content removed from sample

Department stores to enhance in-store experience and keep hygiene measures

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CHANNEL DATA

Table 152 Department Stores: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 153 Department Stores: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 154 Department Stores GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 155 Department Stores GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 156 Department Stores LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 157 Department Stores LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 158 Department Stores Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 159 Department Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

VARIETY STORES IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Decline continues as non-essential products and lack of specific focus reduces consumer demand

Content removed from sample

Pandemic closures lead players to seek new selling formats

Content removed from sample

Variety stores continue to invest in in-store improvements

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PROSPECTS AND OPPORTUNITIES

Slow recovery expected as pandemic continues to hamper sales

Content removed from sample

Innovations and brand partnerships needed to entice consumers to stores

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Expansion boom to be delayed, with players instead set to focus on e-commerce

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Content removed from sample

CHANNEL DATA

Table 160 Variety Stores: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 161 Variety Stores: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 162 Variety Stores GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 163 Variety Stores GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 164 Variety Stores LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 165 Variety Stores LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 166 Variety Stores Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 167 Variety Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

WAREHOUSE CLUBS IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Warehouse clubs value sales observed decline but retains higher value sales than pre-pandemic

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Expansion of warehouse clubs driven by S&R Membership Shopping

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E-commerce options grow but retain only A niche share of category sales

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Content removed from sample

PROSPECTS AND OPPORTUNITIES

Growth set to be observed in value sales and sites/outlets, with the latter particularly driven by S&R Membership Shopping

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Wide variety of international offerings likely to continue to attract higher-income consumers

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E-commerce set to grow in relevance as consumers seek convenience

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CHANNEL DATA

Table 168 Warehouse Clubs: Value Sales, Outlets and Selling Space 2016-2021

	2016	2017	2018	2019	2020	2021
Value sales PHP million	Data removed from sample					
Outlets						
Selling Space '000 sq m						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 169 Warehouse Clubs: Value Sales, Outlets and Selling Space: % Growth 2016-2021

% growth

	2020/21	2016-21 CAGR	2016/21 Total
Value sales PHP million	Data removed from sample		
Outlets			
Selling Space '000 sq m			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 170 Warehouse Clubs GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 171 Warehouse Clubs GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 172 Warehouse Clubs LBN Brand Shares: Outlets 2018-2021

sites/outlets

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 173 Warehouse Clubs LBN Brand Shares: Selling Space 2018-2021

selling space '000 sq m

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 174 Warehouse Clubs Forecasts: Value Sales, Outlets and Selling Space 2021-2026

	2021	2022	2023	2024	2025	2026
Value sales PHP million						
Outlets						
Selling Space '000 sq m						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

Table 175 Warehouse Clubs Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

% growth

	2021/22	2021-26 CAGR	2021/26 Total
Value sales PHP million			
Outlets			
Selling Space '000 sq m			

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms

DIRECT SELLING IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Direct selling heavily affected as lack of face-to-face interactions hampers sales

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Success of companies in pandemic is dependent on product offerings, with health and sports products seeing much greater demand than beauty products

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Focus on digital intensifies as COVID-19 drives business online

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PROSPECTS AND OPPORTUNITIES

Full recovery expected despite continuation of unauthorised selling problems

Content removed from sample

Personal relationship will continue to be at the core of direct selling

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Local culture will support channel growth as trust remains vital to sales

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CHANNEL DATA

Table 176 Direct Selling by Category: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
- Apparel and Footwear Direct Selling						
- Beauty and Personal Care Direct Selling						
- Consumer Electronics Direct Selling						
- Consumer Health Direct Selling						
- Consumer Appliances Direct Selling						
- Food and Drink Direct Selling						
- Home Care Direct Selling						
- Home Improvement and Gardening Direct Selling						
- Homewares and Home Furnishings Direct Selling						
- Media Products Direct Selling						
- Personal Accessories and Eyewear Direct						

Data removed from sample

Selling	Data removed from sample
- Pet Care Direct Selling	
- Traditional Toys and Games Direct Selling	
- Video Games Hardware Direct Selling	
- Other Direct Selling	
Direct Selling	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 177 Direct Selling by Category: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Apparel and Footwear Direct Selling	Data removed from sample		
- Beauty and Personal Care Direct Selling			
- Consumer Electronics Direct Selling			
- Consumer Health Direct Selling			
- Consumer Appliances Direct Selling			
- Food and Drink Direct Selling			
- Home Care Direct Selling			
- Home Improvement and Gardening Direct Selling			
- Homewares and Home Furnishings Direct Selling			
- Media Products Direct Selling			
- Personal Accessories and Eyewear Direct Selling			
- Pet Care Direct Selling			
- Traditional Toys and Games Direct Selling			
- Video Games Hardware Direct Selling			
- Other Direct Selling			
Direct Selling			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 178 Direct Selling GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 179 Direct Selling GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 180 Direct Selling Forecasts by Category: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
- Apparel and Footwear Direct Selling						
- Beauty and Personal Care Direct Selling						
- Consumer Electronics Direct Selling						
- Consumer Health Direct Selling						
- Consumer Appliances Direct Selling						
- Food and Drink Direct Selling						
- Home Care Direct Selling						
- Home Improvement and						

Data removed from sample

Gardening Direct Selling	Data removed from sample
- Homewares and Home Furnishings Direct Selling	
- Media Products Direct Selling	
- Personal Accessories and Eyewear Direct Selling	
- Pet Care Direct Selling	
- Traditional Toys and Games Direct Selling	
- Video Games Hardware Direct Selling	
- Other Direct Selling	
Direct Selling	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 181 Direct Selling Forecasts by Category: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Apparel and Footwear Direct Selling	Data removed from sample		
- Beauty and Personal Care Direct Selling			
- Consumer Electronics Direct Selling			
- Consumer Health Direct Selling			
- Consumer Appliances Direct Selling			
- Food and Drink Direct Selling			
- Home Care Direct Selling			
- Home Improvement and Gardening Direct Selling			
- Homewares and Home Furnishings Direct Selling			
- Media Products Direct Selling			
- Personal Accessories and Eyewear Direct Selling			
- Pet Care Direct Selling			
- Traditional Toys and Games Direct Selling			
- Video Games Hardware Direct Selling			
- Other Direct Selling			
Direct Selling			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

HOMESHOPPING IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Exit of the leading brand O Shopping signifies major difficulties for the channel

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Livestream shopping emerges creating strong competition for homeshopping

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E-commerce and social media become essential selling platforms

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PROSPECTS AND OPPORTUNITIES

Increased competition from e-commerce set to hinder recovery of the category

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Declining popularity of TV and cable viewing to be detrimental to channel prospects

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Live selling set to become more popular as players turn to social media

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CHANNEL DATA

Table 182 Homeshopping by Category: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
- Apparel and Footwear Homeshopping						
- Beauty and Personal Care Homeshopping						
- Consumer Appliances Homeshopping						
- Consumer Electronics Homeshopping						
- Consumer Health Homeshopping						
- Food and Drink Homeshopping						
- Home Care Homeshopping						
- Home Improvement and Gardening Homeshopping						
- Homewares and Home Furnishings Homeshopping						
- Media Products Homeshopping						
- Personal Accessories and Eyewear Homeshopping						
- Pet Care Homeshopping						
- Traditional Toys and Games Homeshopping						
- Video Games Hardware Homeshopping						
- Other Homeshopping						
Homeshopping						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 183 Homeshopping by Category: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Apparel and Footwear Homeshopping			
- Beauty and Personal Care Homeshopping			
- Consumer Appliances Homeshopping			
- Consumer Electronics Homeshopping			
- Consumer Health Homeshopping			
- Food and Drink Homeshopping			
- Home Care Homeshopping			
- Home Improvement and Gardening Homeshopping			
- Homewares and Home Furnishings Homeshopping			
- Media Products Homeshopping			
- Personal Accessories and Eyewear Homeshopping			

Data removed from sample

- Pet Care Homeshopping
- Traditional Toys and Games Homeshopping
- Video Games Hardware Homeshopping
- Other Homeshopping

Homeshopping

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 184 Homeshopping GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 185 Homeshopping GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 186 Homeshopping Forecasts by Category: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
- Apparel and Footwear Homeshopping						
- Beauty and Personal Care Homeshopping						
- Consumer Appliances Homeshopping						
- Consumer Electronics Homeshopping						
- Consumer Health Homeshopping						
- Food and Drink Homeshopping						
- Home Care Homeshopping						
- Home Improvement and Gardening Homeshopping						

Data removed from sample

- Homewares and Home Furnishings Homeshopping	Data removed from sample
- Media Products Homeshopping	
- Personal Accessories and Eyewear Homeshopping	
- Pet Care Homeshopping	
- Traditional Toys and Games Homeshopping	
- Video Games Hardware Homeshopping	
- Other Homeshopping	
Homeshopping	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 187 Homeshopping Forecasts by Category: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Apparel and Footwear Homeshopping	Data removed from sample		
- Beauty and Personal Care Homeshopping			
- Consumer Appliances Homeshopping			
- Consumer Electronics Homeshopping			
- Consumer Health Homeshopping			
- Food and Drink Homeshopping			
- Home Care Homeshopping			
- Home Improvement and Gardening Homeshopping			
- Homewares and Home Furnishings Homeshopping			
- Media Products Homeshopping			
- Personal Accessories and Eyewear Homeshopping			
- Pet Care Homeshopping			
- Traditional Toys and Games Homeshopping			
- Video Games Hardware Homeshopping			
- Other Homeshopping			
Homeshopping			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

VENDING IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Content removed from sample

RECOVERY AND OPPORTUNITIES

Content removed from sample

Table 188 Vending by Category: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
- Staple Foods Vending	Data removed from sample					
- Snacks Vending						
- Cooking Ingredients and Meals Vending						
- Dairy Products and Alternatives Vending						
- Packaged Drinks Vending						
- Personal Hygiene Vending						
- Tobacco Vending						
- Hot Drinks Vending						
- Traditional Toys and Games Vending						
- Other Products Vending						
Vending						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 189 Vending by Category: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Staple Foods Vending	Data removed from sample		
- Snacks Vending			
- Cooking Ingredients and Meals Vending			
- Dairy Products and Alternatives Vending			
- Packaged Drinks Vending			
- Personal Hygiene Vending			
- Tobacco Vending			
- Hot Drinks Vending			
- Traditional Toys and Games Vending			
- Other Products Vending			
Vending			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 190 Vending Forecasts by Category: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
- Staple Foods Vending	Data removed from sample					
- Snacks Vending						
- Cooking Ingredients and Meals Vending						
- Dairy Products and Alternatives Vending						
- Packaged Drinks Vending						
- Personal Hygiene Vending						
- Tobacco Vending						
- Hot Drinks Vending						
- Traditional Toys and Games Vending						
- Other Products Vending						
Vending						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Forecast value data in constant terms
Note 2: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

Table 191 Vending Forecasts by Category: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Staple Foods Vending			

- Snacks Vending
- Cooking Ingredients and Meals Vending
- Dairy Products and Alternatives Vending
- Packaged Drinks Vending
- Personal Hygiene Vending
- Tobacco Vending
- Hot Drinks Vending
- Traditional Toys and Games Vending
- Other Products Vending

Vending

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Forecast value data in constant terms
Note 2: Vending data captures vending systems installed in public and semi-captive environments only. For further details refer to definitions.

E-COMMERCE (GOODS) IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

E-commerce sales boom as retailers shift online in pandemic

Content removed from sample

High e-commerce growth continues to be driven by third party players despite advances in brand websites

Content removed from sample

Content removed from sample

Consumers purchase an increasing number of categories through e-commerce, though personal shopper programmes remain popular

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Growth is set to accelerate given long-term changes consumer behaviour

Content removed from sample

Content removed from sample

Shopee's support of local businesses will help it retain its top position

Content removed from sample

Omnichannel approach will be the future for most retailers in the Philippines

Content removed from sample

CHANNEL DATA

Table 192 E-Commerce (Goods) by Channel and Category: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
- Mobile E-Commerce (Goods)	Data removed from sample					
- Cross-Border E-Commerce (Goods)						
-- Foreign E-Commerce (Goods)						

-- Domestic E-Commerce (Goods)	
- E-Commerce (Goods) by Product Category	
-- Apparel and Footwear E-Commerce	
-- Beauty and Personal Care E-Commerce	
-- Consumer Appliances E-Commerce	
-- Consumer Electronics E-Commerce	
-- Consumer Health E-Commerce	
-- Food and Drink E-Commerce	Data removed from sample
-- Home Care E-Commerce	
-- Home Improvement and Gardening E-Commerce	
-- Homewares and Home Furnishings E-Commerce	
-- Media Products E-Commerce	
-- Personal Accessories and Eyewear E-Commerce	
-- Pet Care E-Commerce	
-- Traditional Toys and Games E-Commerce	
-- Video Games Hardware E-Commerce	
-- Other E-Commerce	
E-Commerce (Goods)	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Mobile e-commerce (goods) and cross-border e-commerce (goods) not included in e-commerce (goods) total to avoid double counting.

Table 193 E-Commerce (Goods) by Channel and Category: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Mobile E-Commerce (Goods)			
- Cross-Border E-Commerce (Goods)			
-- Foreign E-Commerce (Goods)			
-- Domestic E-Commerce (Goods)			
- E-Commerce (Goods) by Product Category			
-- Apparel and Footwear E-Commerce			
-- Beauty and Personal Care E-Commerce			
-- Consumer Appliances E-Commerce		Data removed from sample	
-- Consumer Electronics E-Commerce			
-- Consumer Health E-Commerce			
-- Food and Drink E-Commerce			
-- Home Care E-Commerce			
-- Home Improvement and Gardening E-Commerce			
-- Homewares and Home Furnishings E-Commerce			

-- Media Products E-Commerce
-- Personal Accessories and Eyewear E-Commerce
-- Pet Care E-Commerce
-- Traditional Toys and Games E-Commerce
-- Video Games Hardware E-Commerce
-- Other E-Commerce
E-Commerce (Goods)

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Note: Mobile e-commerce (goods) and cross-border e-commerce (goods) not included in e-commerce (goods) total to avoid double counting.

Table 194 E-Commerce (Goods) GBO Company Shares: % Value 2017-2021

% retail value rsp excl sales tax

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 195 E-Commerce (Goods) GBN Brand Shares: % Value 2018-2021

% retail value rsp excl sales tax

Brand	Company (GBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 196 Forecast E-Commerce (Goods) by Channel and Category: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
- Mobile E-Commerce						

(Goods)	Data removed from sample
- Cross-Border E-Commerce (Goods)	
-- Foreign E-Commerce (Goods)	
-- Domestic E-Commerce (Goods)	
- E-Commerce (Goods) by Product Category	
-- Apparel and Footwear E-Commerce	
-- Beauty and Personal Care E-Commerce	
-- Consumer Appliances E-Commerce	
-- Consumer Electronics E-Commerce	
-- Consumer Health E-Commerce	
-- Food and Drink E-Commerce	
-- Home Care E-Commerce	
-- Home Improvement and Gardening E-Commerce	
-- Homewares and Home Furnishings E-Commerce	
-- Media Products E-Commerce	
-- Personal Accessories and Eyewear E-Commerce	
-- Pet Care E-Commerce	
-- Traditional Toys and Games E-Commerce	
-- Video Games Hardware E-Commerce	
-- Other E-Commerce	
E-Commerce (Goods)	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Mobile e-commerce (goods) and cross-border e-commerce (goods) not included in e-commerce (goods) total to avoid double counting.
Note 2: Forecast value data in constant terms.

Table 197 Forecast E-Commerce (Goods) by Channel and Category: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Mobile E-Commerce (Goods)	Data removed from sample		
- Cross-Border E-Commerce (Goods)			
-- Foreign E-Commerce (Goods)			
-- Domestic E-Commerce (Goods)			
- E-Commerce (Goods) by Product Category			
-- Apparel and Footwear E-Commerce			
-- Beauty and Personal Care E-Commerce			
-- Consumer Appliances E-Commerce			
-- Consumer Electronics E-Commerce			

-- Consumer Health E-Commerce
-- Food and Drink E-Commerce
-- Home Care E-Commerce
-- Home Improvement and Gardening E-Commerce
-- Homewares and Home Furnishings E-Commerce
-- Media Products E-Commerce
-- Personal Accessories and Eyewear E-Commerce
-- Pet Care E-Commerce
-- Traditional Toys and Games E-Commerce
-- Video Games Hardware E-Commerce
-- Other E-Commerce
E-Commerce (Goods)

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Mobile e-commerce (goods) and cross-border e-commerce (goods) not included in e-commerce (goods) total to avoid double counting.
Note 2: Forecast value data in constant terms.

MOBILE E-COMMERCE (GOODS) IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Smartphone usage is still increasing despite economic difficulties in the country

Content removed from sample

Active mobile wallet players also help push e-commerce

Content removed from sample

Retailers and e-commerce players continue to improve mobile app experience

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Continuous growth expected as retailers increasingly invest in mobile offerings

Content removed from sample

Greater investments in digital infrastructure expected to boost mobile e-commerce

Content removed from sample

Content removed from sample

5G roll out will support development of mobile e-commerce

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CHANNEL DATA

Table 198 Mobile E-Commerce (Goods): Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
- Mobile E-Commerce (Goods)	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 199 Mobile E-Commerce (Goods): % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
- Mobile E-Commerce (Goods)	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 200 Mobile E-Commerce (Goods) Forecasts: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
- Mobile E-Commerce (Goods)	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 201 Mobile E-Commerce (Goods) Forecasts: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total
- Mobile E-Commerce (Goods)			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

FOOD AND DRINK E-COMMERCE IN THE PHILIPPINES - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Online grocery continues to grow despite more relaxed restrictions

Content removed from sample

E-commerce websites observe high growth as consumers prove willing to try new online concepts

Content removed from sample

New players penetrate online space to capitalise on rapidly growing demand

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Promising growth thanks to convenience and variety of options

Content removed from sample

Online grocery purchases to be aided by partnerships with Shopee and Lazada

Content removed from sample

Facebook Marketplace to increasingly challenge more traditional channels for category share

Content removed from sample

CHANNEL DATA

Table 202 Food and Drink E-Commerce: Value 2016-2021

PHP million

	2016	2017	2018	2019	2020	2021
-- Food and Drink E-Commerce	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 203 Food and Drink E-Commerce: % Value Growth 2016-2021

% current value growth, retail value rsp excl sales tax

	2020/21	2016-21 CAGR	2016/21 Total
-- Food and Drink E-Commerce	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 204 Food and Drink E-Commerce Forecasts: Value 2021-2026

PHP million

	2021	2022	2023	2024	2025	2026
-- Food and Drink E-Commerce	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.

Table 205 Food and Drink E-Commerce Forecasts: % Value Growth 2021-2026

% constant value growth, retail value rsp excl sales tax

	2021/2022	2021-26 CAGR	2021/26 Total

-- Food and Drink E-Commerce

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Forecast value data in constant terms.