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# **PHILIPPINES Y2021 – Y2022 COUNTRY REPORT**

**49<sup>TH</sup> EXECUTIVE COUNCIL MEETING**

*of the*

**FEDERATION OF ASIA-PACIFIC AIRCARGO  
ASSOCIATION  
(FAPAA)**

*hosted by the*

**Indonesian Logistics and Forwarders  
Association (IFLA)**

*at*

**The Anvaya Beach Resort Bali, Indonesia**  
June 8-10, 2023

# INDUSTRY BACKGROUND

The role of a Freight Forwarder is an integral part of the whole Supply Chain. Transportation of goods across the cycle of the supply chain is inevitable, may it be performed by Air, Land, Sea or multimodal.

The growth of the Freight Forwarding Industry in the Philippines is correlated to the volume of traded goods for transport. The government's Build, Build, Build Project and the exponential growth of e-Commerce business has propelled the growth of the Forwarding Industry. Despite the reduction in volume of traded goods globally during the COVID-19 pandemic, a Compound Annual Growth Rate of 4.1% in the Global Freight Forwarding Market is expected between Y2021 – Y2028 according to the report of Coherent Market Insights.

REGULATORY STRUCTURE		
Operations	Agency	Department
Air Transport	Civil Aeronautics Board	Department of Transportation
Sea Transport	Fair Trade Enforcement Bureau	Department of Trade and Industry
Land Transport	Land Transportation Franchising and Regulatory Board	Department of Transportation

## ACCREDITED FREIGHT FORWARDERS BY CATEGORY

Category	As of May 31, 2022	As of March 31, 2023
NVOCC + IFF + DFF	148	152
NVOCC + IFF	394	413
IFF + DFF	48	55
IFF Only	183	199
DFF Only	80	85

## AIRFREIGHT PERFORMANCE

### Cargo Traffic in Kilos

By Top 30 International Forwarders	
Y2018	368,736,782
Y2019	354,372,604
Y2020	346,462,525
Y2021	400,348,668
Y2022	364,235,198

## SEAFREIGHT PERFORMANCE

### Cargo Traffic in TEU

*(Manila North & South Ports, North & South Luzon Ports, Visayas Ports, North & South Mindanao Ports)*

Year	Import	Export	Total
Y2019	2,336,971	2,363,241	4,700,212
Y2020	2,005,248	2,012,061	4,017,309
Y2021	2,276,594	2,227,640	4,504,234
Y2022	2,468,770	2,418,707	4,887,477

Source: Philippine Ports Authority

# **RECENT INDUSTRY UPDATES & CHALLENGES**

## **Customs Administrative Order (CAO) 15-2020 – Supervision and Control Over Vessels and Aircrafts**

The regulation provides guidelines in the electronic submission of Cargo Manifest and Consolidated Cargo Manifest (CCM) including imposable fines in case of failure to supply the advance and requisite manifests. The freight forwarding industry is appealing for review of the implementing guidelines particularly the prescribed time of the Bureau of Customs for manifest submission, and the value and application of fines and penalties.

## **TOPS-CRMS PPA Administrative Order 04-2021**

A new policy to monitor and register all inbound shipping containers using the data exchange platform. The proposed system will allow logistics stakeholders to track status of their cargoes including containers. However, the stakeholders believed that this PPA system is redundant to the existing systems of the Bureau of Customs and terminal operators with the same functionalities, and will entail additional procedure, cost and delays. The regulation is currently deferred for implementation and for further review.

## **PPA Administrative Order 06-2019**

The regulation is believed to be in redundancy to the other government regulation such as Land Transport and Franchising Regulatory Board (LTFRB), prescribing tree planning compliance for freight forwarders' accreditation.

## **DTI and DOTr Harmonization of Freight Forwarders Accreditation**

The Department of Trade and Industry (DTI) and the Department of Transportation (DOTr) is crafting a Joint Memorandum Circular (JMC) to streamline and harmonize the requirements in the accreditation of airfreight and seafreight forwarders. The JMC provides a unified online processing and issuance of forwarders accreditation through single platform.

# PMTLAI STRUCTURE

## Y2022 – Y2024 PMTLAI Board of Directors & Officers



**Fernando Juan C. Perez**  
President  
CEL LOGISTICS, INC.



**Daisy A. Barquin**  
Vice President - Airfreight  
ASPAC INTERNATIONAL, INC.



**Denirene Misty M. Casipit**  
Vice President - Seafreight  
TRANSMODAL INTERNATIONAL INC.



**Maria Antoinette Reyes-Jara**  
Vice President - Land &  
Chairman - Sports & Fellowship



**Elma P. Simbahan**  
Corporate Secretary  
FM GLOBAL LOGISTICS (PHIL.), INC.



**Christopolus S.A. Coching**  
Treasurer  
ASIALINK CARGO PHILS., INC.



**John Francis R. Villanueva**  
P.R.O.  
FREIGHT OPTIONS INCORPORATED



**Digzylou Mae M. Umali**  
Chairman - Membership  
PACIFIC CONCORD CONTAINER  
LINES, INC.



**Nestor E. Salvania**  
Chairman - Social Responsibility  
N.E.S. CARGO EXPRESS INTERNATIONAL  
CORP.



**Ernie C. Soriano**  
Chairman - Ethics & Standards  
F2 GLOBAL LOGISTICS INC.



**Aldric Benjamin Z. De Leon**  
Chairman - Information Technology  
PAC-ATLANTIC LINES (PHILS) INC.



**Theodore Anton Abe T. Estrada**  
Chairman - Ways & Means  
ALL TRANSPORT NETWORK INC.



**Joseph Veloso**  
Director - Cebu Chapter  
CEL LOGISTICS, INC.

## Y2022 – Y2024 PMTLAI Board of Directors & Officers



**Marilyn C. Alberto**  
Honorary Chairman  
KINTETSU WORLD EXPRESS  
(PHILS.) INC.



**Doris P. Torres**  
Executive Director  
Chairman, Training & Education  
STAMM INTERNATIONAL, INC.



**Atty. Brenn A. Doctor**  
Legal Adviser



**Jenielyn F. Deluso**  
Secretary General  
PMTLAI Secretariat

## PMTLAI BACKGROUND

On July 10, 2017, more than two-thirds of the membership of both AFPI and PISFA voted for the consolidation of the two Associations to have a unified and holistic representation of the Philippine freight forwarding and logistics industry.

PMTLAI was established on October 10, 2017 and elected its first set of officers in February 2018.



PHILIPPINE INTERNATIONAL  
SEAFREIGHT FORWARDERS ASSOCIATION, INC.

## MEMBERSHIP – INTERNATIONAL ORGANIZATIONS

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International Air Transport  
Association (IATA)



Federation of Asia-Pacific  
Association (FAPAA)



ASEAN Federation of  
Forwarders Association (AFFA)



International Federation of Freight  
Forwarders Associations (FIATA)

## MEMBERSHIP – NATIONAL ORGANIZATIONS

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Philippines Chamber of  
Commerce and Industry



Logistics Services Philippines



## **REPRESENTING THE INDUSTRY WITH VARIOUS GOVERNMENT AGENCIES**

- ☐ Department of Transportation (DOTr)
- ☐ Bureau of Customs (BOC)
- ☐ Civil Aeronautics Board (CAB)
- ☐ Philippine Economic Zone Authority (PEZA)
- ☐ Manila International Airport Authority (MIAA)
- ☐ Land Transportation Franchising & Regulatory Board (LTFRB)
- ☐ Metro Manila Development Authority (MMDA)
- ☐ Civil Aviation Authority of the Philippines (CAAP)
- ☐ Department of Trade and Industry (DTI)
- ☐ DTI – Bureau of Product Standards (DTI – BPS)
- ☐ DTI – Fair Trade Enforcement Bureau (DTI – FTEB)
- ☐ DTI – Supply Chain and Logistics Management Division (DTI – SCLMD)
- ☐ Anti-Red Tape Authority (ARTA)

# PROJECTS / ACTIVITIES / PROGRAMS

## A. Project of PMTLAI

- September 1, 2022 – Relief Operation to Abra
- October 10, 2022 – Golf Tournament
- November 3-4, 2022 – Air Cargo Day

## B. Programs Participated by PMTLAI

- January 5, 2022 – China-Asean Logistics Industry Matchmaking Conference (CABC)
- January 25, 2022 – Y2022 DTI Logistics Efficiency Index
- February 3-4, 2022 – Y2022 Forum for Competition in Developing Countries (Y2022 FCDC)
- February 7, 2022 – Seminar for Promotion of Cold Chain Logistics Standards in Malaysia
- February 11, 2022 – Invitation for UP NCTS Webinar Series 2022-001: Technologies/Infrastructure for Public Transportation Smart Mobility
- February 18, 2022 – China-ASEAN Mercantile Exchange (CAMEX)
- March 24, 2022 – BPS/TC 85 (LOGISTICS) Meeting
- March 29, 2022 – Meeting on Private Stakeholders Concerns regarding Terminal Appointment Booking System (TABS), Pass-Through Fees and Other Logistics Issues and Concerns
- April 5, 2022 – Invitation to the Philippine Economic Briefing and Sulong Pilipinas 2022
- April 5, 2022 – National Workshop: Strengthening the Trade Facilitation Capacity of the Philippines (e-Commerce Session)
- April 8, 2022 – Presentation on Container Ledger Account (CLA) to DTI Secretary Ramon M. Lopez
- April 26-29, 2022 – Invitation for Collaboration on the National Roadmap Study re Decarbonizing Pathways for Freight Transport in the Philippines (DOTr)
- April 28, 2022 – FIATA: Industry Stakeholders Consultation-Discussion on the PPA TOP-CRMS Project. Exchanged views and assessed impact on the ease and cost of doing business in the Philippines
- May 5, 2022 – Discussion on National ICT, Transport and Logistics Infrastructure Plan
- May 10, 2022 - Market Structure: Issues Affecting the Global Maritime Supply Chain
- May 11, 2022 - Invitation to the Public Consultation on PPA AO 04-2021
- May 17-20, 2022 – FIATA: Moving Forward: Solutions to the Crisis; high-level panel and side event to the Y2022 FIATA Headquarters Meeting in Geneva
- May 20, 2022 – Y2022 Logistics Efficiency Indicator for Logistics Service Providers, Study on Last-Mile Delivery Services, Study on Warehousing and Storage
- May 26, 2022 – Invitation for STM Awareness for Logistics Service Providers
  - 1<sup>st</sup> virtual meeting of the Working Group on Sea Freight Transport (under the Technical Committee on Logistics), (BPS/TC 84/WG 1)
- May 27, 2022 – 3<sup>rd</sup> Clarificatory Meeting on PPA AO No. 04-2021 and the Implementation of TOP-CRMS
- June 2, 2022 – Virtual Launching Ceremony of the Readiness Assessment for Cross-Border Paperless Trade (CBPT): The Philippines
- June 29, 2022 – Consultation on the Draft Implementing Rules and Regulations of RA 11659, otherwise known as the Amendments to the Public Service Act
  - DTI-BPS Invitation: Webinar on Standards of Sea Freight Transport
- June 30, 2022 – Y2022 FIATA General Meeting
- July 14-16, 2022 – Y2022 FAPAA Meeting in Penang, Malaysia
- July 15, 2022 – UNESCAP Regional Conference on Logistics Providers
- July 21, 2022 – Meeting with DP World

- July 25-30, 2022 – AFFTA ToT Meeting
- July 28, 2022 – BPS/TC WG 1 Meeting – Technical Working Group meeting to draft domestic seafreight transport national standard
- August 4, 2022 – Meeting, Logistics Services Providers of the Phils. (LSPH)
- August 17-18, 2022 – Supra Regional Clusters in Cagayan De Oro
- August 25, 2022 – Brown Bag Meeting: 1<sup>st</sup> Session – Reducing Logistics Cost
- August 30, 2022 – Brown Bag Meeting: 2<sup>nd</sup> Session – Technology Upgrade and Digital Transformation of the Logistics Services Sector
- August 31, 2022 – TESDA NCR Industry Forum
- September 1, 2022 – BPS Small Group Meeting
- September 1-2, 2022 – DTI Roadshow: Eastern Mindanao Logistics Cluster (EASMIN Log Cluster) Region 12 Davao City
- September 6, 2022 – 3<sup>rd</sup> Session: Investments in Logistics Infrastructure
- September 27-28, 2022 – 3<sup>rd</sup> ASEAN Transport Facilitation Working Group (TFWG)
- October 6, 2022 – DPNS on Seafreight Transport – Domestic Shipping
- October 10, 2022 – 3<sup>rd</sup> Meeting on RCEP Industry Cooperation Meeting
- October 18, 2022 – 4<sup>th</sup> Brown Bag Meeting on Streamlining Import-Export Procedures
- October 18-19, 2022 – APSN Forum
- October 21, 2022 – 5<sup>th</sup> Brown Bag Meeting: Skills Upgrade and Supply Chain and Logistics Workforce Development
- October 24, 2022 – Invitation to the USAID Strengthening Private Enterprise for the Digital Economy (SPEED) Public Lunch
- October 25, 2022 – Issues of Exporters and Other Port Users on Export Procedures
- November 4, 2022 - Coordination Meeting on the Concerns from Philippine Shipping Lines (ARTA)
- November 9-10, 2022 – Invitation for Virtual Scenario Design Workshop
- November 17, 2022 – Committee on Transportation Meeting – Regulating Local Charges
- December 1, 2022 – FAPAA/FIATA Meeting
- December 9-10, 2022 – AFFA Conference and AGM
- December 14, 2022 – 3<sup>rd</sup> Logistics Services Philippines (LSPH) Consultative Workshop
- December 19, 2022 – 3<sup>rd</sup> Logistics Services Philippines (LSPH) Conference