

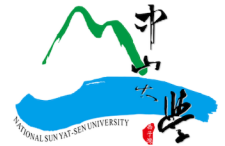
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# Challenges and opportunities towards healthier food retail policies

*Key actions for policy success in the Philippines*



## POLICY BRIEF



# Challenges and opportunities towards healthier food retail policies

*Key actions for policy success in the Philippines*

**A double burden of malnutrition is currently observed in the Philippines,** characterized by the coexistence of undernutrition and overnutrition.

### Enabling a healthier food retail environment

by increasing the availability and accessibility of nutritious foods can help to reduce the growing prevalence of overweight and obesity and improve the diets of the populations.

### Limited food retail policies with nutrition and health objectives

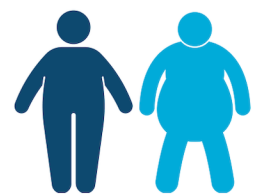
were currently observed in the Philippines. Other related policies do not serve to complement health and nutrition objectives. Moreover, the implementation of these policies is presently inadequate, accompanied by insufficient monitoring and challenges related to policy continuity.

### The double burden of malnutrition

The Philippines has been experiencing a double burden of malnutrition in recent years, characterized by rising cases of undernutrition (stunting and wasting) and overnutrition (overweight and obesity) [1]. The alarming increasing trend of overweight and obesity across all age groups has been observed over the past 10 years [2]. By 2030, 11.71 billion USD in economic costs are projected in the country due to overweight and obesity [3]. This calls for immediate action to prevent further losses in resources.



**95 Filipino children**  
die from malnutrition  
everyday



**27 million Filipinos**  
are overweight and  
obese



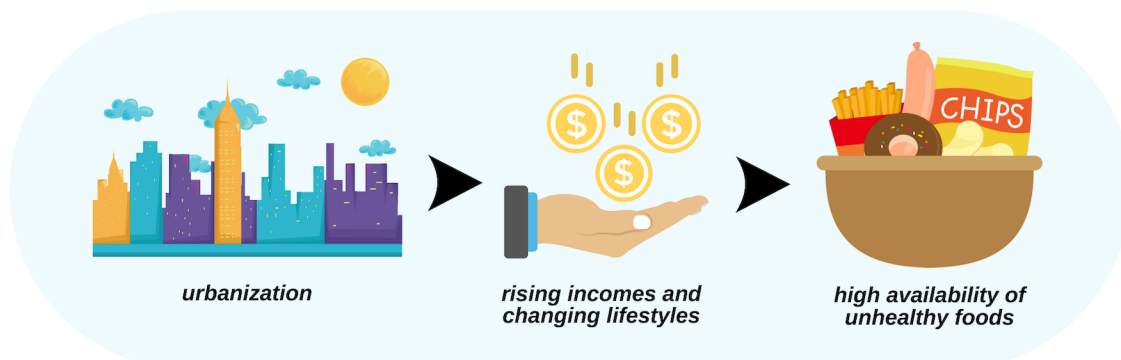
**70% of deaths yearly**  
due to non-communicable  
diseases



**11.71 billion USD**  
projected economic  
impact of overweight and  
obesity by 2030

# FOOD RETAIL ENVIRONMENTS AS ONE OF THE CONTRIBUTORS TO MALNUTRITION

This policy brief contains highlights from the Southeast Asian Obesogenic Food Environment (SEAOFE) research. The four-phase study aims to identify strategic policy design opportunities to address the double burden of malnutrition through healthier food environments by analyzing the current food retail landscape, consumer experiences, in-store auditing, retailers' perspectives, and food retail policies. Malnutrition is a growing public health concern that can be attributed to the 'nutrition transition' as the population became more attuned to Westernized diets high in fat, salt, and sugar [4]. Most of the population value convenience in food preparation due to changing lifestyles and increasing consumer incomes. Moreover, dietary changes are influenced by rapid urbanization and the increased availability of processed and ultra-processed foods in the food environment [5].

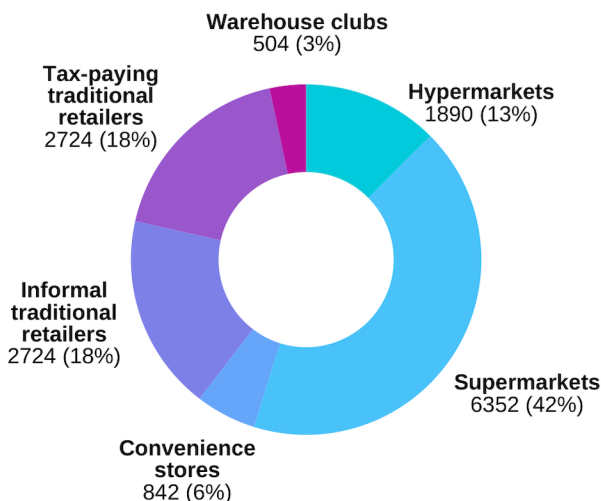


**Figure 1.** Contributing factors to obesogenic food environments

Food retailers play an essential role in being a middleman between suppliers and consumers and determining market availability and accessibility of food. In 2021, modern retail formats (supermarkets, hypermarkets, convenience stores) dominated the food retail sales in the Philippines (Figure 2). Supermarkets comprised 42% of food retail sources, followed by traditional retailers with 36% share (formal and informal). This suggests that supermarkets and traditional retail stores are the top sources of Filipino consumers where they purchase most of their food products.



**Figure 3.** Top purchases of consumers across food retail stores\*



**Figure 2.** Food sales by percentage share and value in 2021 (in million USD) [6]

However, our study shows that these sources commonly display and sell discretionary or non-core products.\* Supermarkets are the primary consumers' source of processed food items. The availability of unhealthy food products influences consumer preferences and food choices. Top products purchased by Filipino consumers across food retail stores include bread, instant noodles, chips, and instant coffee products.\* Informal retailers are also largely unregulated, making it difficult to assess their product offerings' nutritional and safety quality.

\*publications to follow

# THE FOOD RETAIL POLICY LANDSCAPE IN THE PHILIPPINES

## MAIN FOOD RETAIL POLICIES



Consumer Act of the Philippines  
Food and Drug Administration Act  
Food Safety Act



Prioritizes food safety  
Limited to no specific objectives  
related to nutrition and health

Currently, there are limited food retail policies with nutrition-specific objectives in the Philippines. The three republic acts that are found to govern the food retail industry in the country include the Consumer Act of the Philippines [7], the Food and Drug Administration Act [8], and the Food Safety Act of 2013 [9]. However, these policies are primarily concerned with ensuring consumers' food safety, with limited to no specific objectives related to nutrition and health. Meanwhile, the Philippine Plan of Action for Nutrition [10] is the national framework for the government's six-year plan to address nutrition-specific issues. Efforts to address malnutrition are present under the nutrition-specific program, "Overweight and Obesity Management and Prevention Program." Although healthy food environments are one of its outcomes, specific plans and interventions for food retail were not explicitly outlined.

## FOOD RETAIL POLICIES WITH NUTRITION & HEALTH OBJECTIVES

1. An Act for Salt Iodization Nationwide (ASIN Law)
2. Philippine Food Fortification Act
3. Tax Reform for Acceleration and Inclusion (TRAIN Law) - SSBs
4. Healthy Food and Beverage Choices in Schools and DepEd Offices
5. Elimination of Industrially-Produced Trans-Fatty Acids for the Prevention of NCDs
6. Quezon City Anti-Junk Food and Sugary Drinks Ordinance of 2019
7. Quezon City Healthy Food Procurement Act

In total, only seven food retail policies with nutrition and health outcomes are observed. The remaining food retail policies are either concerned with nutrition but lack food retail aspects or are only concerned with limited types of food products and commodities. This means that there is an opportunity for more holistic policies to ensure that the population has access to nutritious, affordable food.

## POTENTIAL BENEFITS OF DEVELOPING HEALTHIER FOOD RETAIL POLICIES

### Reduction of...



Malnutrition cases  
Non-communicable diseases and other diet-related illnesses  
Public spending on hospitalization expenses

### Increase of...



Consumer purchase of healthy foods  
Funds and revenue from fines or penalties imposed  
Healthy food retail interventions

Figure 4. Potential Benefits of Developing Healthier Food Retail Policies [11-13]

# BARRIERS TO HEALTHY FOOD RETAIL POLICIES

Several challenges were identified regarding healthier food retail policies in the Philippines. This can be divided into four main themes policy and governance, corporate power, consumer behaviors, and external drivers.



- Lack of food retail policies with nutrition and health objectives
- Political disparities
- Administrative roadblocks
- Silos across government
- Technical language of policies
- Limited stakeholder engagement
- Lack of government-industry collaborations



- Changing consumer behaviors and lifestyles towards convenience
- Food preference (high fat, salt, and sugar)
- Lack of consumer education and awareness
- Financial limitations of low-income groups



- Large control over supply chain
- Financial capabilities and advertising power
- Low interest in selling healthy food products
- Corporate interference during policy making



- Complexities within the food supply chain
- Lack of availability and unequal distribution of food products
- Overpopulation and lack of agricultural land
- Lack of monitoring among small-scale and informal retailers
- Expensive prices of healthy food
- Lack of research on food retail environments

# IMMEDIATE ACTIONS FOR THE ADVANCEMENT OF HEALTHIER FOOD RETAIL POLICIES

At the national level, the Department of Health and the National Nutrition Council have been identified as the key government agencies that can initiate changes for healthier food retail policies to improve nutrition outcomes. Several recommendations for immediate action have been outlined below:

**STEP 1 – Strengthen the multisectoral government approach to develop food retail policies.** The Department of Health can establish stronger networks and partnerships with other government agencies (e.g., Department of Trade and Industry – food retail, Department of Agriculture – agriculture and supply) to strengthen the advocacy of including food retail policies with nutrition and health objectives in national policies. Ideally, the coordination extends beyond technical working group meetings and translates into actions and outcomes.

**STEP 2 – Amendment of existing policies and regulations to include food retail and nutrition and health objectives.** To achieve policy coherence, nutrition and health objectives can be clearly stated and mainstreamed across different food retail policies. Specific policies and actions for amendments may include nationwide republic acts such as the Consumer Act, Food Safety Act, Philippine Plan of Action for Nutrition (PPAN), and Philippine Development Plan (PDP).

**STEP 3 – Operationalization of the Philippine Nutrient Profile Model (PNPM).** The ongoing action to develop the Philippine Nutrient Profile Model (PNPM) can be prioritized to have a nutritional reference to assess the healthiness of food products in the market. Once it is finalized, other food retail policies, such as increased availability of healthy food and imposing taxes on unhealthy food, can be initiated.

**STEP 4 – Fostering government-industry collaborations.** Successful food retail policies highly depend on the cooperation of large players in the food retail industry. The government can support retailers in successfully complying with the new guidelines and regulations, such as through tax reductions, infrastructure support, and financial incentives. In-store promotion and placement strategies for healthy foods can be implemented in collaboration with modern retailers.

**STEP 5 – Creation of structures for enhanced monitoring and implementation of policies:** The multisectoral government approach should have clear structures and mechanisms to monitor and implement policies at the ground level. Policies should be presented in layman's terms for more straightforward implementation of local government units. Each government agency's respective duties and responsibilities can be specified to achieve target goals and objectives.

**STEP 6 – Increase food and nutrition literacy of consumers to develop healthy food choices and behaviors:** The government should promote healthy food consumption to consumers through easy-to-follow interventions such as *Pinggang Pinoy*. Amendments and development of new policy actions and regulations towards healthier food retail can be adequately communicated to consumers to increase knowledge and awareness.

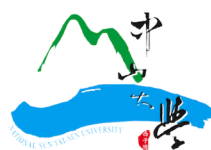
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**Note:** This policy brief contains highlights from the four-phased research of the **Southeast Asian Obesogenic Food Environment (SEAOFE)** team. The SEAOFE team is composed of researchers from Indonesia, Malaysia, the Philippines, and Thailand. This research was funded by the International Development Research Centre, Canada (Project ID 109309). Participating institutions are as follows:



Canada





## SOUTHEAST ASIA OBESOGENIC FOOD ENVIRONMENT (SEAOFE) TEAM

The Southeast Asian Obesogenic Food Environment (SEAOFE) research is the first international comparative study in the SEA region to comprehensively analyze the retail food environment, consumer and retailer perspectives regarding the retail food environment, as well as existing policies influencing food retail. The study is explicitly focused on Indonesia, Malaysia, the Philippines, and Thailand and their specific challenges related to the double burden of malnutrition. This burden manifests as a complex issue where some children are overweight while others suffer from stunting and wasting, highlighting the simultaneous existence of both overnutrition and undernutrition. The ongoing global urbanization and economic gains ultimately influence the presence of an “obesogenic environment”—a setting that promotes unhealthy dietary habits and contributes to the increase in non-communicable diseases (NCDs) associated with poor nutrition and obesity. Thus, effective policies that address the supply and demand dimensions of access to affordable, healthy foods must be implemented to tackle malnutrition in Southeast Asia.

The first coordination meeting was held in September 2020, bringing representatives from all four study countries to discuss and finalize the research protocol. The team comprises renowned researchers from each country site with backgrounds in food and nutrition, social science, policy, and economics. The study was implemented for four years (March 2020 - 2024) with an approximately one-year timeframe for each phase.

*If you have any questions regarding the study, please feel free to message the SEAOFE Philippines team:*

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For more information, the published protocol of the SEAOFE study can be accessed through:

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