



MANILA
2025 FORUM ON COMPETITION
IN DEVELOPING COUNTRIES

SPECIAL EDITION

PHILIPPINE COMPETITION BULLETIN



EDITORS' NOTE

This special edition of the *Philippine Competition Bulletin* highlights key insights from the 2025 Manila Forum on Competition in Developing Countries, a flagship advocacy event that the Philippine Competition Commission (PCC) has been organizing since 2017. After a hiatus of two years, the Manila Forum returned in 2025 with the theme “From Farm to Table: The Role of Competition in Agricultural Development.”

Held on February 5-6, the forum featured five panel discussions that provided a platform for meaningful dialogue on how competition policy can support the agricultural sector, contribute to sustainable development, and improve food access and security in the Philippines.

Recordings of the forum are available for viewing at the PCC's official [Facebook page](#) and [YouTube channel](#).

Coordination and cooperation to improve competition outcomes in the agricultural sector

By Paul Jeffrey Ballentos

The need for a balanced and coordinated approach to addressing the challenges in the agricultural sector was highlighted during the 2025 Manila Forum on Competition in Developing Countries, held on February 5-6 in Pasay City.

In his opening remarks, PCC Chairperson Michael Aguinaldo conveyed the need to balance various policy objectives in the agricultural sector in developing countries. He emphasized charting a path that puts people's needs first and ensures farmers and fisherfolk are not left behind.

Aguinaldo also stressed that consumer welfare remains the central focus of competition policy. “Guided by the principle that consumer welfare reigns supreme, we believe it is possible for people to reap the benefits of competition while ensuring that all needs are met and no sectors are left behind,” he said. Aguinaldo also noted the agriculture sector's growing contribution to the country's

economy while employing roughly one-fourth of the Philippine labor force. This presents a challenge in balancing protection for those who sustain the country's food requirements with the push for healthy competition.

Department of Economy, Planning, and Development Secretary Arsenio Balisacan remarked during the opening program that competition policy is effective in addressing specific market failures, thus it must be integrated into a broader development strategy that tackles the structural issues affecting agriculture. “If a competition authority's actions are to be effective, there must be a high level of recognition that competition policy is to become part and parcel of the government's development agenda. Competition authorities must actively and painstakingly work together with the executive, legislative, and judiciary to embed competition principles within policies, laws, and decisions,” he said.



PCC Chairperson Michael Aguinaldo (left) and DEPDev Secretary Arsenio Balisacan (right) during the opening program of the 2025 Manila Forum on Competition in Developing Countries held on February 5-6.



GWU Law Professor William Kovacic (center, onstage) delivered his keynote address at the 2025 Manila Forum.



George Washington University Law School Professor and former US Federal Trade Commission Chairperson William Kovacic echoed Balisacan's call for authorities to adopt a "whole-of-government" approach, one that requires coordination among competition agencies, agriculture departments, transportation regulators, ports authorities, subsidy providers, and anti-corruption bodies. In his keynote address, Kovacic highlighted the need for proactive competition policies to address distortions in agricultural markets. Using the meat processing and fruit products industries as examples, Kovacic explained how a few market players impose difficult terms on producers. He also pointed to past cases where suppliers formed cartels to manipulate prices of supplements for chickens and vitamins used in breakfast cereals. Beyond private sector practices, he warned that public interventions, such as health and safety restrictions, are sometimes exploited by market incumbents to shield themselves from competition.

To confront these issues, Kovacic advocated for targeted policy responses. He recommended using tools, such as the Organisation for Economic Co-operation and Development Competition Assessment Toolkit, market studies, and public consultations to identify market inefficiencies

and uncover competition issues related to public policies. He cited the UK's Groceries Code Adjudicator as a model for regulating supplier-retailer relationships and highlighted the increasing importance of competition enforcement in addressing excessive pricing, particularly in case of emergencies.

At the regional and global levels, Kovacic emphasized the value of cross-border cooperation. He encouraged competition

authorities to learn from other jurisdictions and collaborate on joint programs, further underlining the importance of enhancing inter-agency coordination. "A single competition agency working alone cannot win this fight... The only way to succeed is through a cooperative strategy," Kovacic concluded. *With Lea Marie Diño* ■

Competition-globalization nexus in agriculture: spotlight on trade, IP

■ ■ ■ By Paul Jeffrey Ballentos



(From left to right) PCC Commissioner Marah Victoria Querol, CIGS Regional Director Dr. Kazuhito Yamashita, WIPO Director Giovanni Napolitano, and WTO Counsellor Cédric Pène during the 2025 Manila Forum panel session on "The Impact of Globalization on Competition in Agricultural Markets."

Globalization influences agricultural markets through trade agreements, intellectual property (IP) laws, and other extraneous factors. These issues were explored in the 2025 Manila Forum's first panel discussion titled, "The Impact of Globalization on Competition in Agricultural Markets," moderated by PCC Commissioner Marah Victoria Querol.

A key focus of the discussion was the role of global agricultural trade patterns in shaping market dynamics. Canon Institute for Global

Studies Regional Director Kazuhito Yamashita analyzed how trade policy negotiations, technological advancements in logistics, and food biosafety frameworks contribute to these evolving patterns. He also examined the prevalence of intra-industry trade, where similar products are simultaneously imported and exported. He cites the US, which is both the largest importer and exporter of beef.

On international trade governance, World Trade Organization (WTO) Counsellor Cédric Pène outlined the complementary functions

of WTO rules and domestic competition policies. While the WTO focuses on reducing trade distortions, competition policies are essential for curbing anti-competitive practices within domestic markets. Despite their different scopes, both frameworks are vital for ensuring that agricultural markets operate efficiently and fairly.

The panel also delved into the growing intersection of IP and agricultural markets. World Intellectual Property Organization

Director Giovanni Napolitano addressed the implications of IP rights on innovation and farmers' rights. He highlighted concerns such as seed patents, biopiracy, and gene-editing technologies. He also pointed out how the ownership of data in precision agriculture could lead to new forms of market control, complicating the competitive landscape. ■

Competition experts examine impact of joint activity on rising food prices

■ ■ ■ By Miguel Simon Mendoza

Rising food prices have brought increased attention to the role of competition enforcement in the agricultural sector. During a panel session at the 2025 Manila Forum moderated by United Nations Conference on Trade and Development Competition and Consumer Policies Branch Legal Officer Akari Yamamoto-Bonenfant, experts discussed how joint activity in agriculture impacts market competition and food prices, highlighting the importance of proactive enforcement in maintaining fair market conditions.

While joint activity in agriculture such as cooperative irrigation systems can benefit small-scale producers, it can also lead to anti-competitive practices among large market players, such as price-fixing or supply restrictions. Competition and Consumer Commission of Singapore Business and Economics Division Director Kong Weng Loong shared an example where a chicken distributor cartel controlling over 90% of the poultry market in Singapore was caught manipulating prices. This case, uncovered through a whistleblower report, underscored the importance of vigilant competition enforcement to maintain fair pricing.

Similarly, Japan Fair Trade Commission (JFTC) Senior Planning Officer Yasuhiko Harayama discussed Japan's experience with price-fixing, citing a beverage can manufacturing cartel that maintained prices amid fluctuating costs of raw materials. Further, the manufacturers exchanged information regarding the scope, timing, and other details of the price revision. They then adjusted their prices to keep them aligned. The JFTC's intervention, which included cease-and-desist orders and fines, reinforced the need for fair pricing even when external pressures affect the market.

Malaysia Competition Commission (MyCC) Competition Economic Division Assistant Director Izzat Muhaimin also highlighted a similar case in Malaysia, where a cartel in the chicken feed sector caused significant price hikes. The MyCC's investigation led to penalties and ongoing legal challenges, emphasizing the need for a balanced enforcement approach which combines advocacy and regulatory action.

Additionally, the experts addressed the challenge of balancing competition with food security. Harayama shared Japan's approach during emergencies, allowing temporary

PANEL SESSION 2: COMPETITION ENFORCEMENT IN AGRICULTURE: INVESTIGATING JOINT ACTIVITY AND ITS IMPACT ON RISING FOOD PRICES



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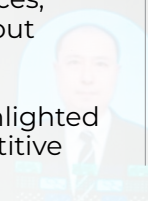


(From left to right) UNCTAD Legal Officer Akari Yamamoto-Bonenfant, MyCC Assistant Director Izzat Muhaimin, CCCS Director Kong Weng Loong, and JFTC Senior Planning Officer Yasuhiko Harayama during the 2025 Manila Forum panel session on "Competition Enforcement in Agriculture: Investigating Joint Activity and Its Impact on Rising Food Prices."

regulatory flexibility while maintaining long-term enforcement consistency. Kong explained how Singapore promotes open markets and diversifies supply chains to reduce monopolistic risks in critical food sectors. Meanwhile, Muhaimin added that Malaysia's policy advice, such as recommending a price range during festive seasons instead of fixed prices, helps maintain market competition without encouraging collusion.

Beyond enforcement, the discussion highlighted the role of advocacy in fostering a competitive

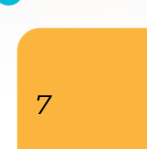
market. Harayama discussed JFTC's educational efforts for agricultural cooperatives, while Kong highlighted the role of whistleblower programs in uncovering hidden cartels. Muhaimin reinforced the need for collaboration with sector regulators to ensure government policies do not inadvertently harm competition. ■



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Protecting small producers through merger control

By Miguel Simon Mendoza

In a session titled “Protecting Producers Amidst Rising Concentration: The Role of Merger Control in Agriculture,” panelists at the 2025 Manila Forum examined how merger control in agricultural markets can shield small-scale producers from the adverse impacts of increasing market concentration. PCC Commissioner Lolibeth Ramit-Medrano moderated the discussion.

University of Johannesburg Professor Simon Roberts discussed the challenges small-scale producers face as global mergers intensify consolidation in agriculture, particularly in upstream processing and distribution. These mergers often lead to coordinated effects, such as collusion and market entry restrictions, while vertical integration and information exchange among large corporations complicate the role of competition authorities in protecting smaller producers.

Competition Authority of Kenya (CAK) Acting Director General Adano Roba added that Kenya’s merger process is suspensory, which

means mergers must be approved by CAK before implementation. He emphasized the importance of collaboration with sector regulators and regional agencies, like the Common Market for Eastern and Southern Africa, to address cross-border mergers that affect small and medium-sized enterprises.

Roba also highlighted how Kenya’s decentralized government structure, with agriculture policies managed by 27 county governments, adds complexity to merger control. With this, the CAK continuously monitors agricultural supply chains to assess risks that could lead to higher prices and reduced bargaining power for small producers.

“[M]ergers are time-bound and the companies obviously plan their notifications very carefully... [S]o we have to really look at those blind spots of vertical dimensions, coordinated effects, and the international reach of the companies,” said Roberts. ■



(From left to right) PCC Commissioner Lolibeth Ramit-Medrano, UJ Professor Simon Roberts, and CAK Acting Director General Adano Roba during the 2025 Manila Forum panel session on “Protecting Producers Amidst Rising Concentration: The Role of Merger Control in Agriculture.”



(From left to right) GWU Law Professor William Kovacic, DA Usec. Asis Perez, ACCC General Manager David Salisbury, and CAK Acting Director General Adano Roba during the 2025 Manila Forum panel session on “Navigating Non-Tariff Measures in the Livestock and Poultry Industry.”

Rethinking non-tariff measures for a fair and competitive market

By Lea Gomez

Imports have been seen as a significant means of addressing production gaps in local livestock amid rising demand for such in recent years. As governments enforce trade regulations and food safety policies to protect consumers and local producers, these measures can also impact market competition. During a 2025 Manila Forum panel session titled, “Navigating Non-Tariff Measures in the Livestock and Poultry Industry,” experts explained how these policies shape the industry. The session was moderated by George Washington University Law School Professor William Kovacic.

Department of Agriculture Undersecretary for Policy, Planning and Regulations Asis Perez emphasized that non-tariff measures (NTMs) such as sanitary and phytosanitary (SPS) requirements are intended to protect consumers and local farmers for food safety purposes, although these may have unintended anticompetitive effects. He also noted that gaps between farmgate and retail prices widened during high-import periods between 2020 and 2023, suggesting that middlemen captured bulk of the profits, thereby leading to high consumer prices.

Australian Competition and Consumer Commission Small Businesses and Agriculture General Manager David Salisbury shared how Australia enforces strict biosecurity measures, while ensuring fair market access for local and imported livestock and poultry products. He explained that clear trade policies and competition laws are essential for food safety without creating unnecessary trade barriers.

Competition Authority of Kenya Acting Director General Adano Roba outlined how SPS measures, often used as non-tariff barriers, have disrupted competition and trade in Kenya’s livestock and poultry sectors, leading to reduced exports, lower market shares, and higher consumer prices. These measures, according to Roba, disproportionately harm small producers and highlight weaknesses in regional compliance and coordination. To address this, he advocated for transparency, independent oversight, stakeholder consultations, and adherence to international standards, alongside market inquiries that reveal anti-competitive pricing and structural challenges in the Kenyan animal feed sector. Additionally, the panelists underscored the

From sea to table: strengthening competition for affordable fish

By Lea Gomez

need for balanced policies that protect public health and local farmers, while keeping markets competitive. They stressed that stronger collaboration between the government (including competition authorities) and industry stakeholders can ensure that NTMs serve their intended purpose without stifling competition. In the Philippines, for example, refining these

regulations can help strengthen its livestock and poultry industry while ensuring fair prices and food security. ■

Fish is a staple in the Filipino diet. However, declining fish production and catch have resulted in limited local supply, causing higher prices for consumers. Panelists gathered for the final session of the 2025 Manila Forum and examined how policies and market conditions influence the supply and pricing of fish products. Moderated by PCC Commissioner Ferdinand Negre, the discussion focused on how competition policies can help create a more dynamic and accessible fish market.

Department of Agriculture (DA) Undersecretary for Fisheries Drusila Bayate emphasized that food security remains a priority and policies must ensure a stable and affordable fish supply while supporting local fisheries. Meanwhile, DA Undersecretary Asis Perez noted that prices of *galunggong* rose due to limited natural supply and growing demand. He also explained that importing

was resorted to after local production dropped due to weak enforcement of fishing regulations and foreign fishing activities. Meanwhile, Hong Kong Competition Commission Chief Executive Officer Rasul Butt shared how Hong Kong tackled cartels in wholesale fish markets, demonstrating how competition enforcement leads to fairer prices and better access to fish products.

The discussion reinforced the need for competition and trade policies that promote a fair fish market. Transparent pricing, support for small-scale fishers, and safeguards against market manipulation are essential to making fish accessible and affordable for Filipino families. ■



(From left to right) PCC Commissioner Ferdinand Negre, HKCC CEO Rasul Butt, DA Usec. Drusila Bayate, and DA Usec. Asis Perez during the 2025 Manila Forum panel session on "Enhancing Competition and Access in the Philippine Fish Market."



PCC Commissioner Michael Peloton closed the 2025 Manila Forum by thanking participants and recognizing how their recommendations could advance competition in the agricultural sector. Peloton emphasized the need for continued dialogue, sound policy, and collaboration among stakeholders from government, academe, the private sector, and the judiciary in order to ensure a robust and dynamic market.

Today's Agenda

- Modern Context
- Policy Tools
- Collaborative Strategies
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**PHILIPPINE
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Ensuring businesses compete and consumers benefit

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