

Food & beverage in ASEAN region

IP landscape study

Philippines

Trademarks and Patents: How will the Philippine IP landscape look like in the future based on status quo?

In the food and beverage industry in the Philippines, trademarks are typically more prevalent than patents, reflecting the sector's specific intellectual property protection needs. This trend is anticipated to continue in the future.

1. Nature of Intellectual Property Needs

2. Challenges in Patentability

- a) Complexity
- b) Trade Secrets

3. Economic and Strategic Considerations

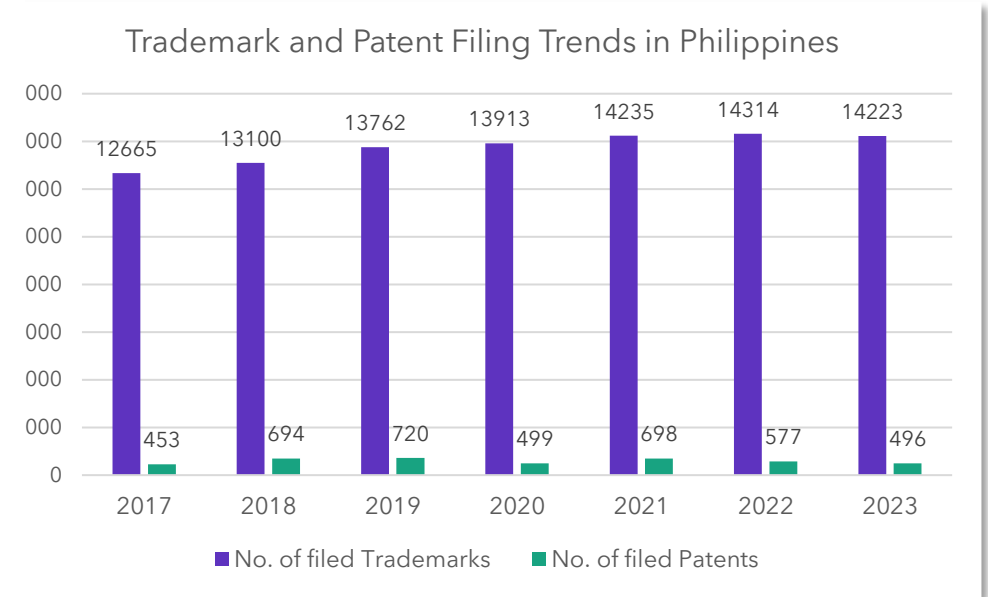
- a) Costs and Time
- b) Market Focus

4. Regulatory and Practical Environment

- a) IP Awareness
- b) Enforcement and Protection

5. Examples in the Philippines

- a) Trademarks
- b) Patents



Patent overview in ASEAN region

The patterns of patent filing activity in the ASEAN region countries (Indonesia, Malaysia, Philippines, Singapore and Thailand) can be seen by comparing patenting activity with worldwide activity in this field and overall activity.

Food & beverage industries in the ASEAN countries are keeping pace with the benchmark of the global food & beverage sector.

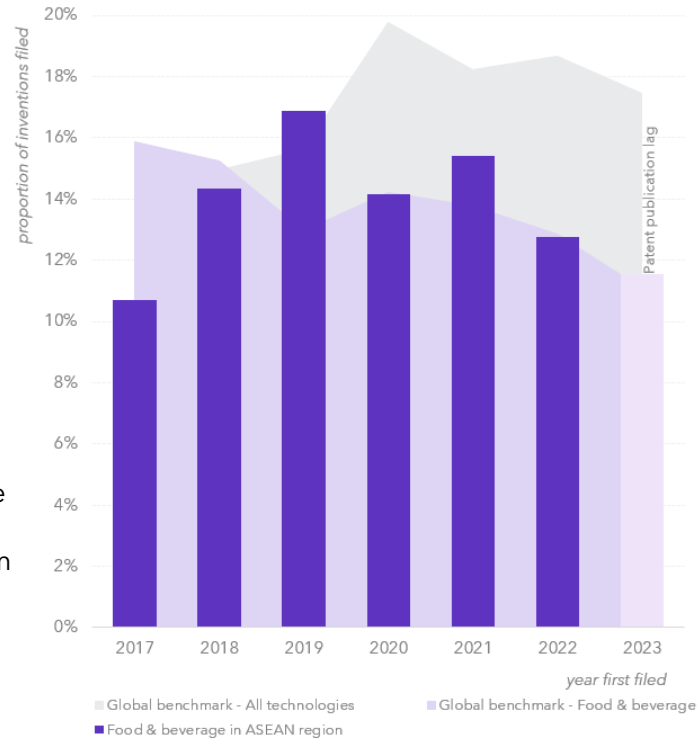
2019 shows significant growth as inventions surpass the declining benchmark. This high growth is mainly attributed to the rise in patenting activity in Indonesia.

Indonesia is dominating the food & beverage patent landscape in terms of volume of innovation. Out of these, 69% contribute from simple and utility patents.

The Philippines followed the next and contributed 31% of innovation among these countries. Out of these, 89% are utility model inventions indicating a strong focus on filing utility models in the Philippines.

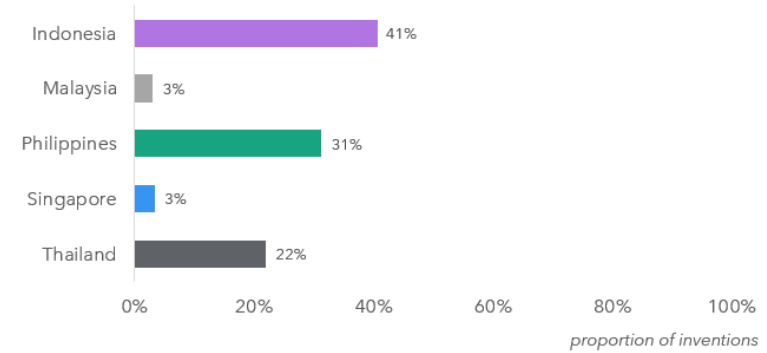
Though Singapore and Malaysia have low volumes, they show consistent filing activity.

Timeline of Food & beverage inventions in ASEAN region
Inventions benchmarked to all patent filings, 2017-2023



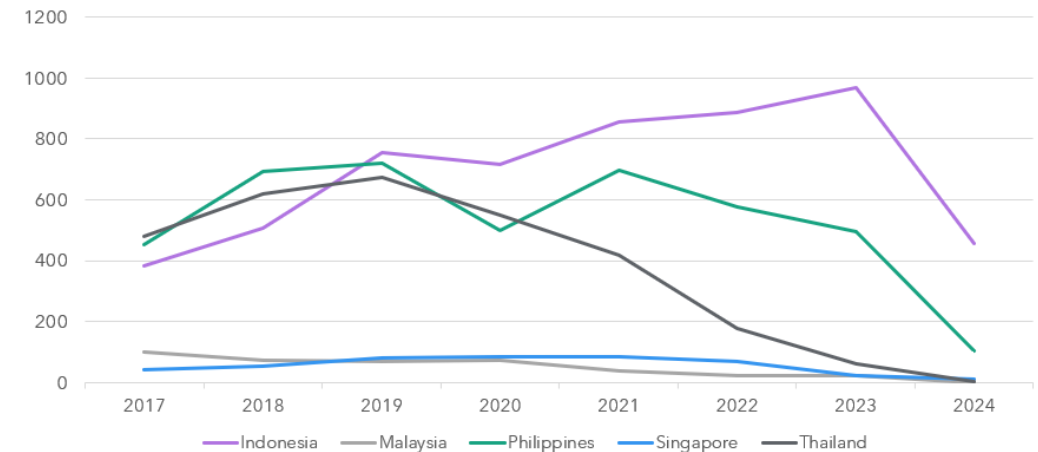
Geographic sources of food & beverage innovation in ASEAN region

Based on first filing location of invention (priority country data)



Timeline trend of food & beverage innovation in ASEAN region

Based on first filing year of invention (priority year earliest)



Timeline trend & entity overview

4,243 patent families were identified in food & beverage domain in the Philippines based on the first filing location of the invention since 2017.

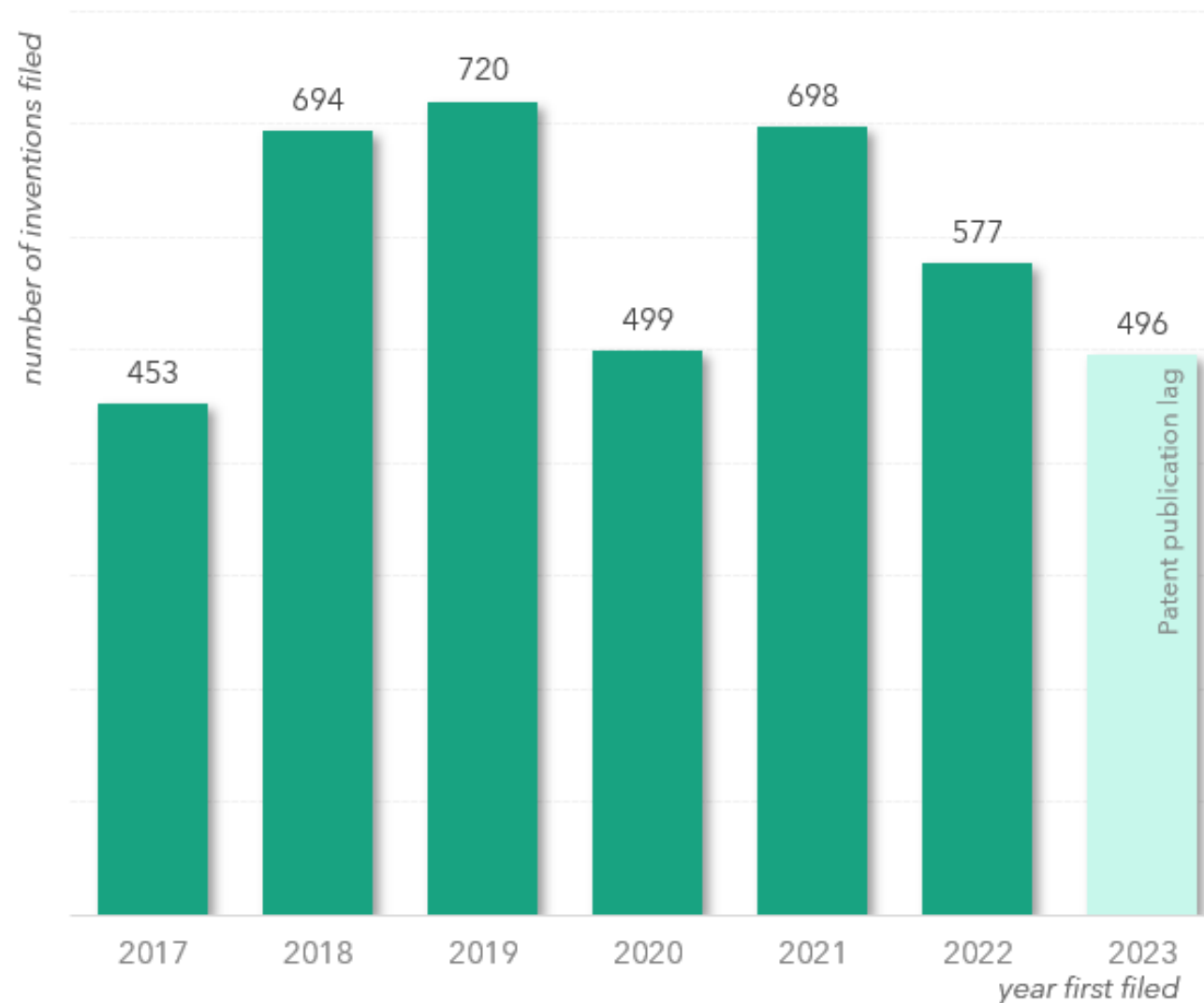
Patent activity shows steady growth except in the year 2020 there is a slight decrease in volume.

In terms of volume, Cebu Technological University is the top player. Bestchoice Packaging is the top corporate entity, with Nanusci Inc. coming in second.

Jollibee Foods Corporation has 2 inventions in this domain.

Timeline of food & beverage innovation in Philippines

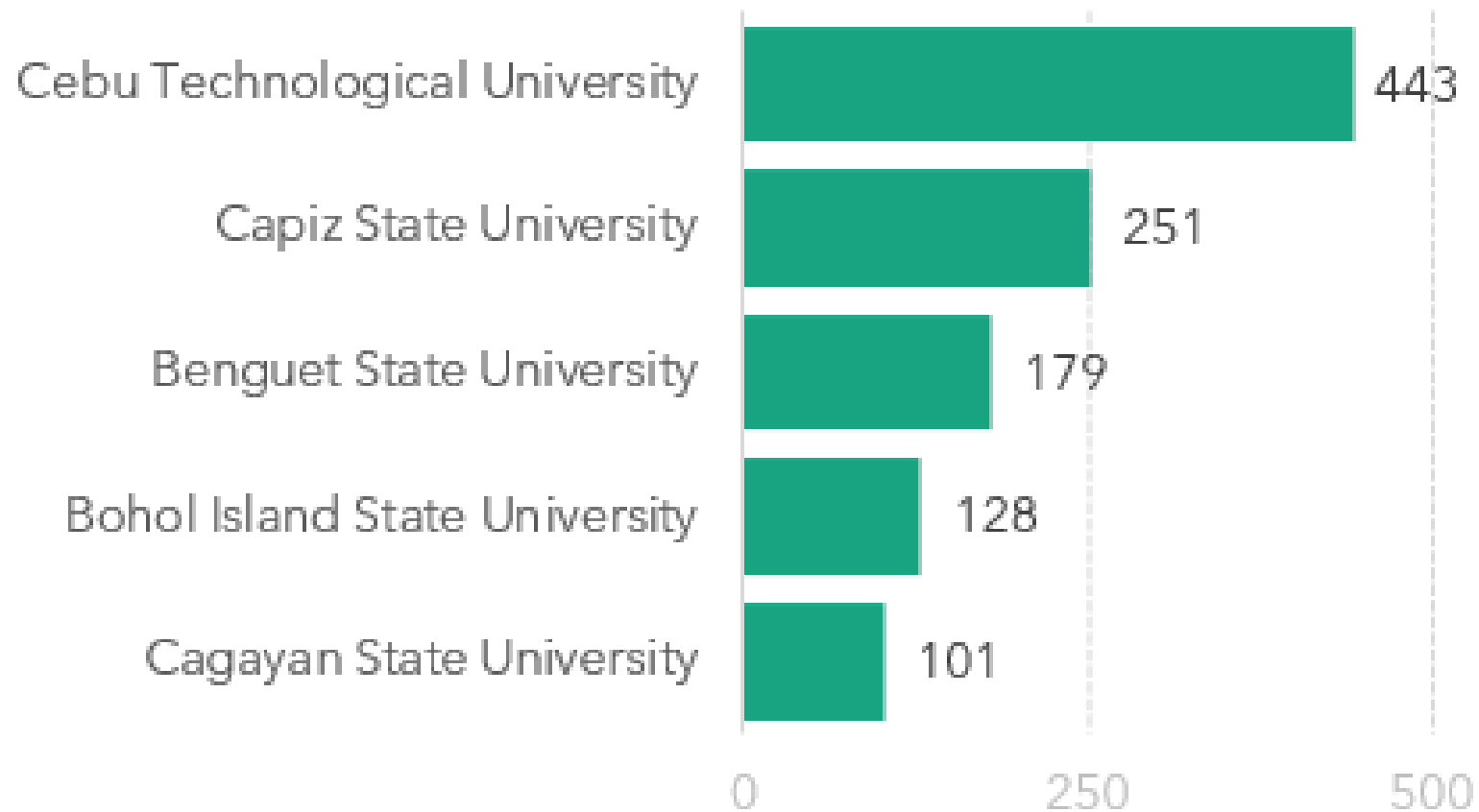
Inventions filed based on first filing location, 2017-2023



Timeline trend & entity overview

Food & beverage innovation in Philippines

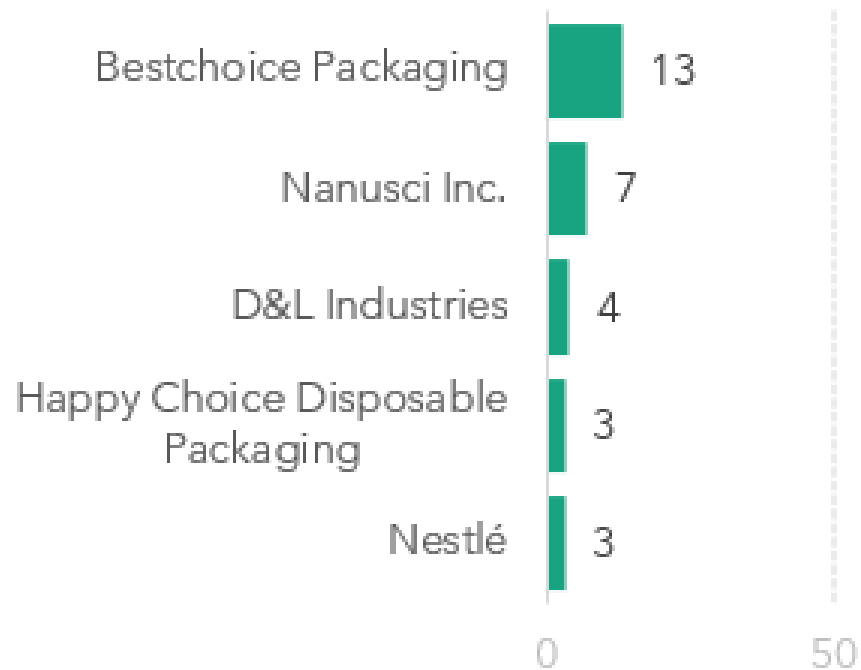
Top 5 overall entities based on volume



Timeline trend & entity overview

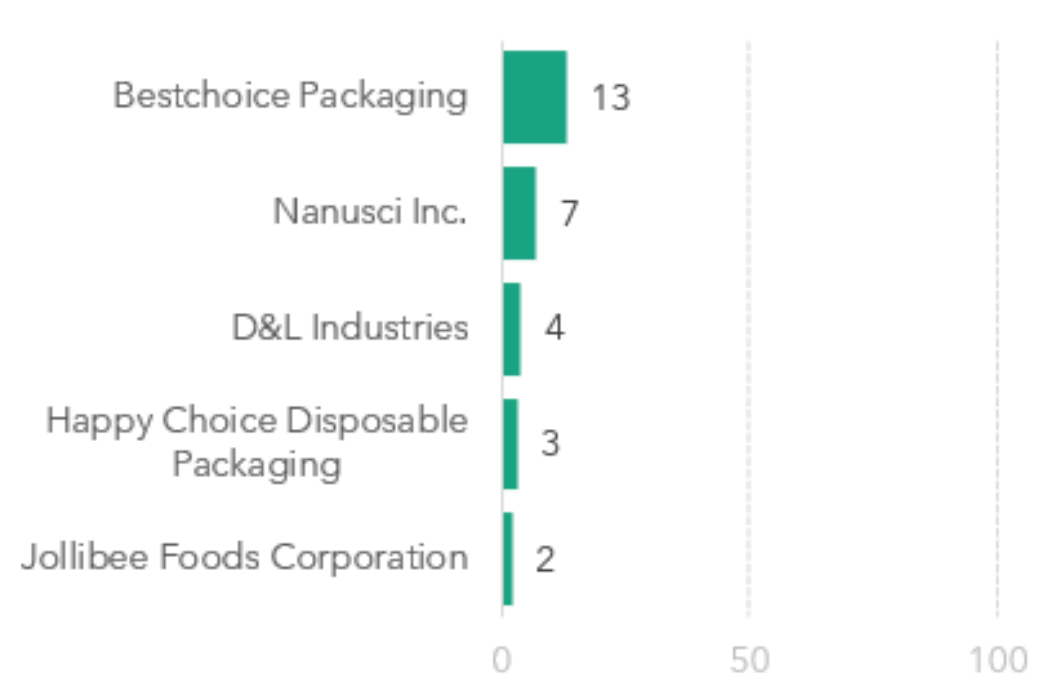
Food & beverage innovation in Philippines

Top 5 corporate entities



Food & beverage innovation in Philippines

Top 5 Philippines domiciled entities



Competitive dynamic

Portfolios with the best combination of high strength and youthfulness (younger inventions and therefore, more remaining life) from the Philippines is:

- **Bestchoice Packaging**

Bestchoice patent portfolio is mainly related to paper made drinking straw and paperboard container for small amount of food products,

Other notable players having recent activity and strength from the Philippines include:

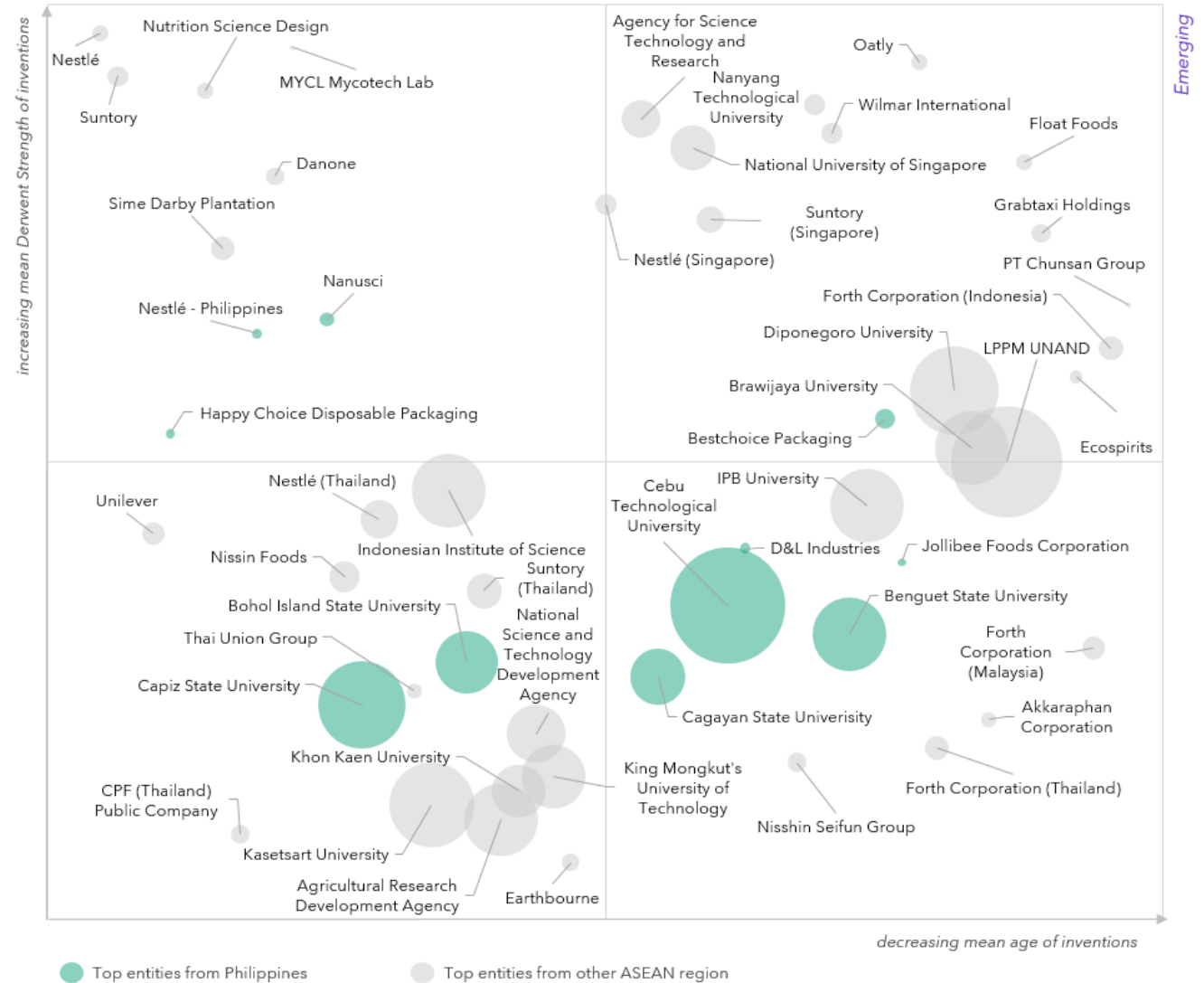
- **D&L Industries**

D&L Industries invention focuses on edible liquid emulsions used in beverage, coconut oil formulation, functional ester used in food preparation.

- **Jollibee Foods Corporation**

Jollibee Foods Corporation patents focus on shield partition panel to be used in top of fast-food counters and food bucket which maintains the crispiness, crunchiness and taste of the fried chicken and pork.

Competitive dynamic model of food & beverage innovation in ASEAN region
Plot of mean Derwent Strength Index v mean age of top portfolios by volume

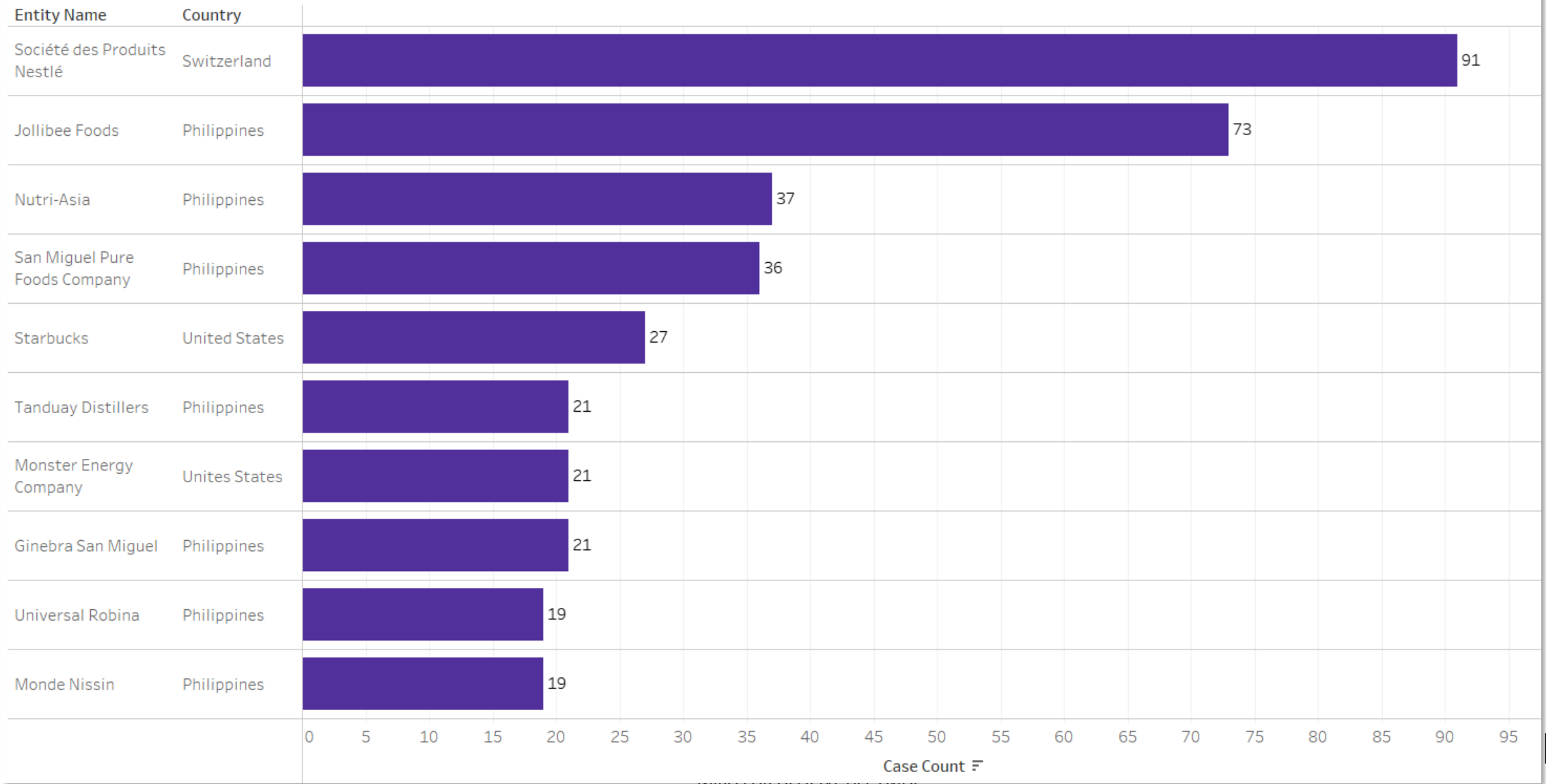


Patent data based on Philippines as an originating country (first filing location)

Philippine-based analysis - Trademark

Top Filers (Domestic & International Companies)

Philippines filers - Global - TOP 10



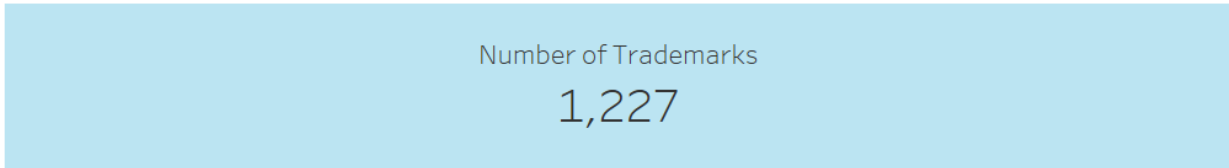
Top Applicants Trademark Score - Importance and Relevance

Company Name	Active Trademark Portfolio in PH	Active Trademarks in Nice Classes 29,30,32,33 in PH	Global presence	No. of Brands	Trademark Score
Nestle	728	466	55,226	10,217	10
Universal Robina	221	264	677	429	8
Starbucks	131	74	19,062	1,436	6.5
Ginebra San Miguel	157	177	248	182	6.25
Monde Nissin	116	108	704	185	5
Monster Energy	52	50	14,311	1,368	4.75
Jollibee Foods	143	74	1,199	140	4.5
Nutri-Asia	188	156	32	26	4.25
Tanduay Distillers	126	121	291	120	4
San Miguel Pure Foods	55	49	174	101	1.75

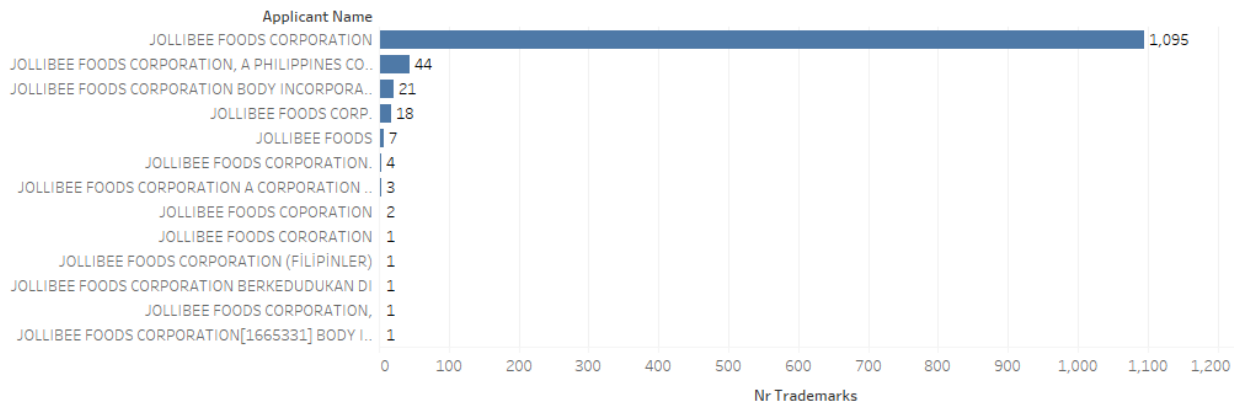
Jollibee Foods - Global Portfolio

Trademark Portfolio Dashboard Jollibee Foods

Company
Jollibee Foods



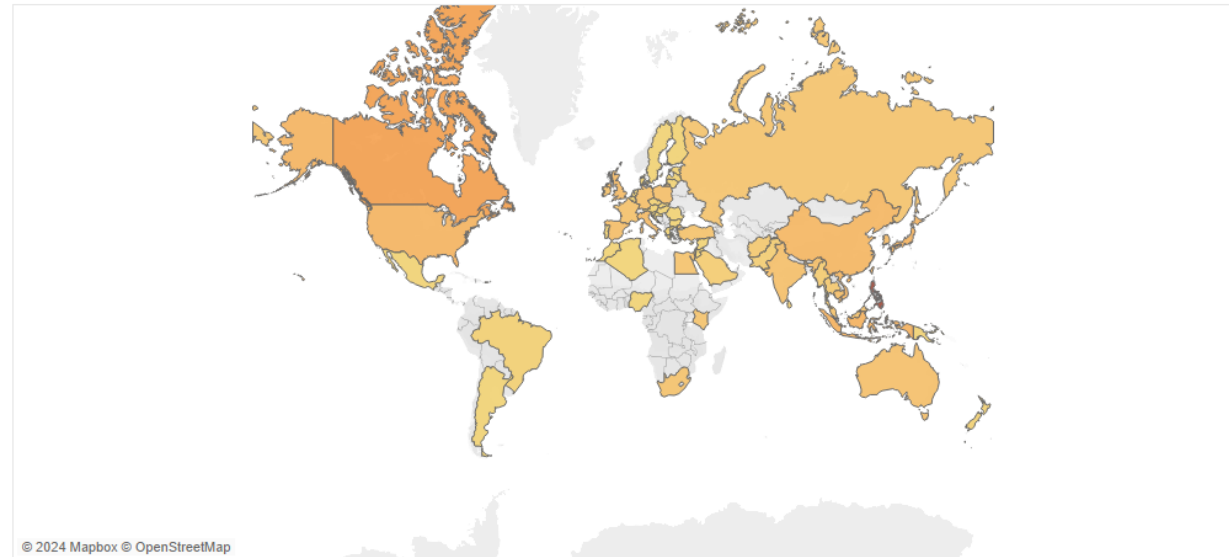
Applicants



Global Food & Beverage related portfolio:
581 trademarks
26 brands

Number of Brands
485

Geographical Distribution



Jollibee Foods - Major Brands Overview

Major Brands

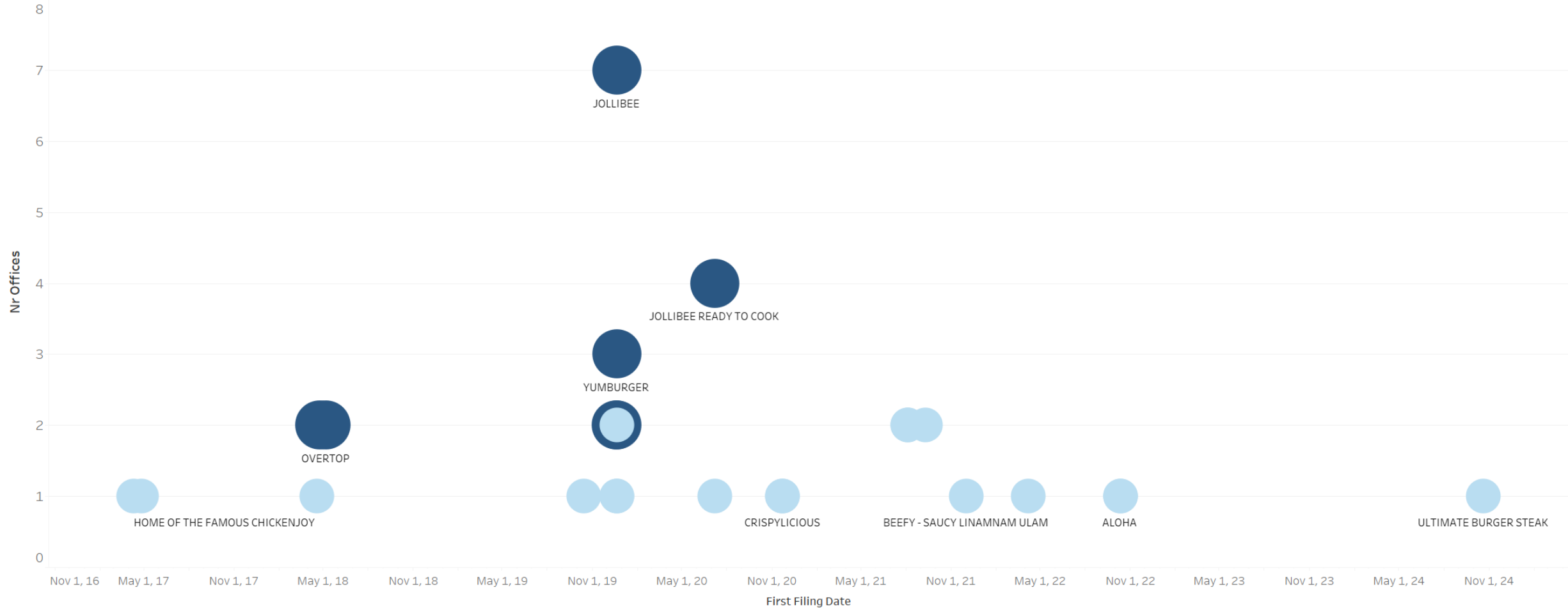
Jollibee Foods

Select a brand to view the class distribution and geographical market expansion

Company
Jollibee Foods

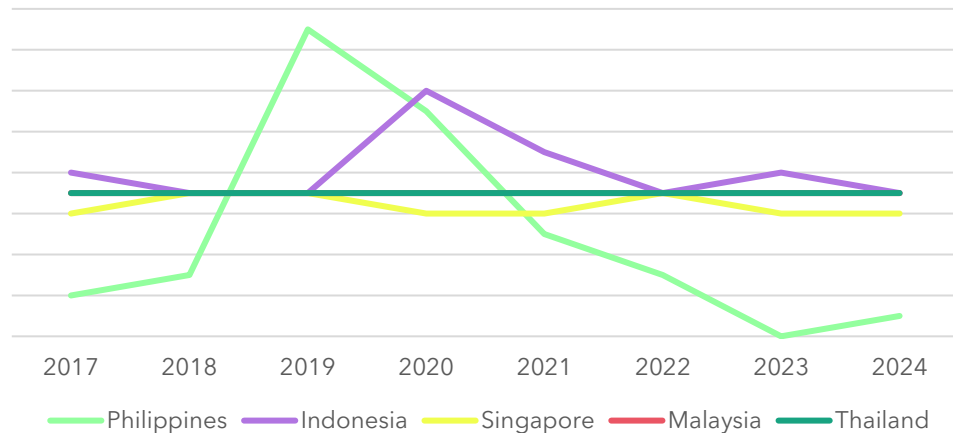
Country ID
PH

Brands of Jollibee Foods

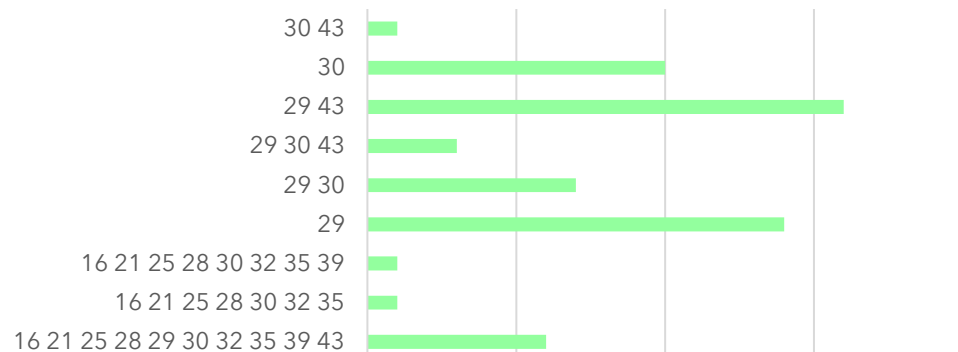


Jollibee Foods: IP Portfolio Overview: Philippines, Indonesia, Singapore, Malaysia, Thailand

Trademark Filing Trend



Nice Class Distribution



- Jollibee is focused on investing in its most prominent brands and expanding its market presence through strategic trademark registrations.
- Stronger **trademark coverage** for its major brands in **Indonesia** and **Singapore** compared to **Malaysia** and **Thailand**, which have only become significant areas of interest since 2020.
- In 2020, Jollibee notably increased its trademark filings, prioritizing its flagship brands such as **CRISPYLICIOUS**, **YUMBURGER**, and **JOLLIBEE** in **Malaysia** and **Thailand**.
- The primary trademark classes used by Jollibee for these filings include:
 - **Class 29**: covering meat, fish, poultry, and processed food products.
 - **Class 30**: encompassing staple foods such as bread, cereals, and other food items.
- These filings indicate Jollibee's strategic focus on securing its core food product offerings as it plans to expand its presence in the region.
- Jollibee Foods Corporation **patents focus** on shield partition panel to be used in top of fast-food counters and food bucket which maintains the crispiness, crunchiness and taste of the fried chicken and pork.

San Miguel Pure Foods - Global Portfolio

Trademark Portfolio Dashboard San Miguel Pure Foods

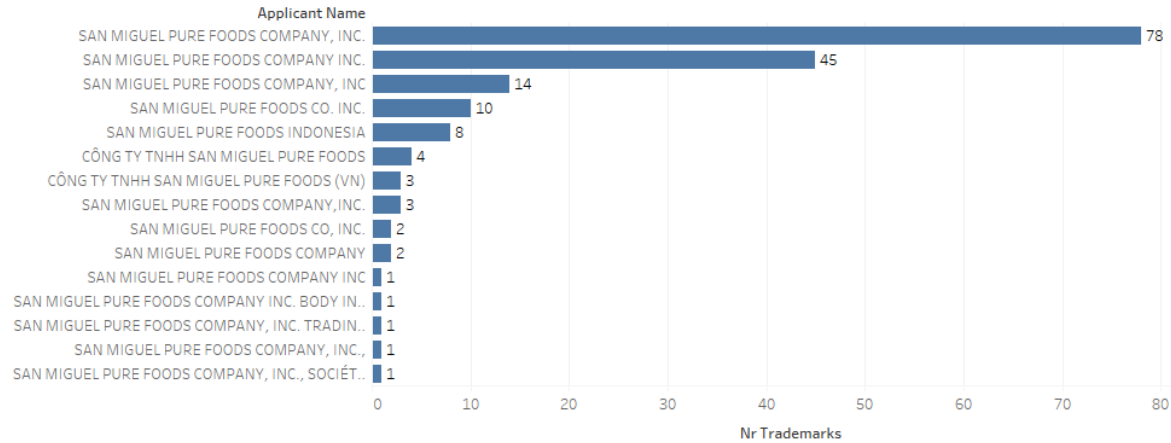
Company
San Miguel Pure Foods

Global Food & Beverage related portfolio:
165 trademarks
20 brands

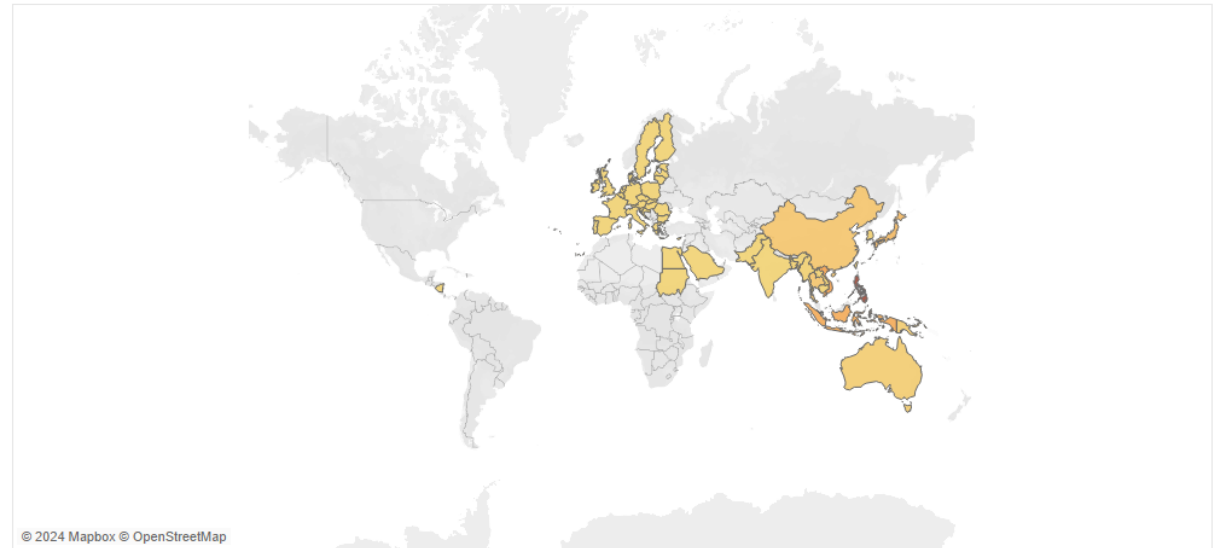
Number of Trademarks
174

Number of Brands
101

Applicants



Geographical Distribution



San Miguel Pure Foods - Major Brands Overview

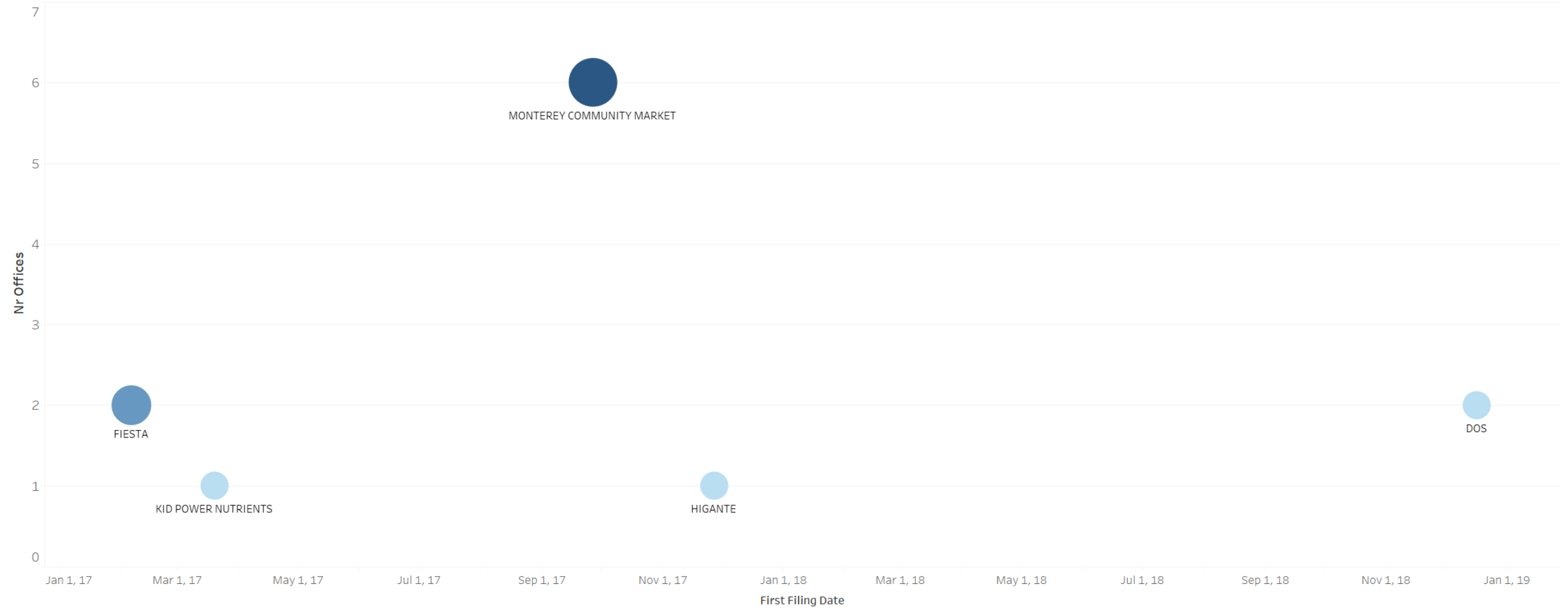
Major Brands
San Miguel Pure Foods

Company
San Miguel Pure Foods

Country ID
PH

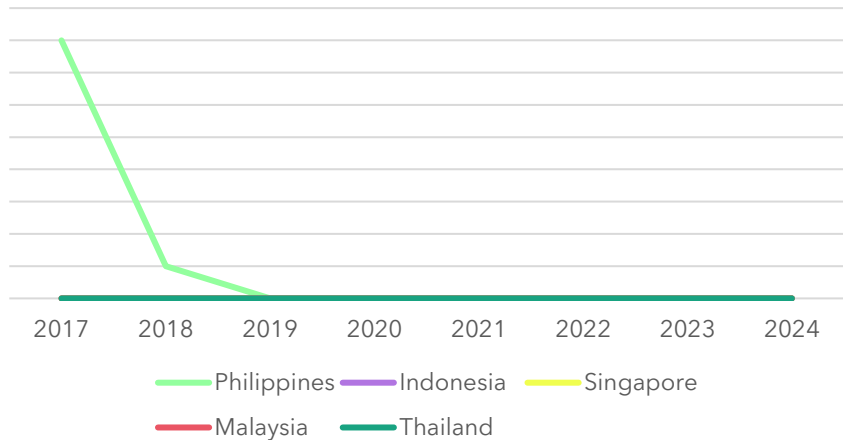
Select a brand to view the class distribution and geographical market expansion

Brands of San Miguel Pure Foods

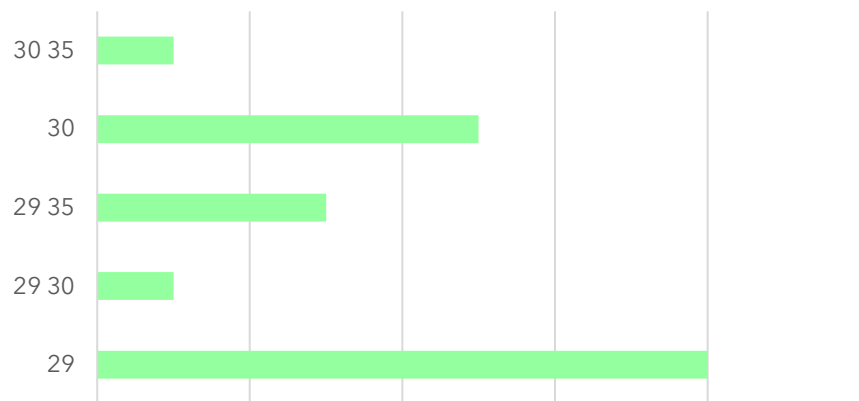


San Miguel Pure Foods: IP Portfolio Overview: Philippines, Indonesia, Singapore, Malaysia, Thailand

Trademark Filing Trend



Nice Class Distribution



- Not very active in Trademark Filing in the period 2017-2024 but they rather rely on historical brands filed before 2017.
- **MONTEREY COMMUNITY MARKET** and **FIESTA** are the biggest brands in Philippines. The most active presence exists in Philippines with the portfolio of overall 50+ active trademarks
- Most of the trademarks are filed in classes 29 and 30 and it is expected that San Miguel Pure Foods keeps this trend in the future with possible expansion to class 35 (Meatshops; stalls, kiosks or stores for the sale of various food and related products.)
- **MAGNOLIA** is the most popular brand in Indonesia and Thailand
- No presence in Malaysia except for five inactive marks
- **Possible further market expansion** will most likely be Indonesia since the company already owns some trademarks that are not only related to F&B industry but also to compatible services that support this industry such as pending trademark application FARMHOUSE in class 43 (Hospitality, vacation home)
- No patent portfolio

Composite score

Composite score of IP activity in Philippines within food & beverage domain

Top Philippines corporate entities based on patent and trademark volume	No. of patent families in Philippines	Patent score	No. of active trademark in Philippines	Trademark score	Composite score	Revenue in USD for 2023 in billion
Nestlé - Philippines	3	16.8	728	10.0	13	104.0
Nanusci	7	18.3	29	4.0	11	NA
Bestchoice Packaging	13	13.4	16	3.0	8	0.1
Happy Choice Disposable Packaging	3	13.4	1	2.0	8	NA
D&L Industries	4	10.1	136	5.0	8	0.0
Jollibee Foods	2	9.8	143	4.5	7	4.2
Universal Robina	NA	NA	221	8.0	NA	2.8
Starbucks	NA	NA	131	6.5	NA	36.2
Ginebra San Miguel	NA	NA	157	6.3	NA	1.0
Monde Nissin	NA	NA	116	5.0	NA	0.4
Monster Energy	NA	NA	52	4.8	NA	7.4
Nutri-Asia	NA	NA	188	4.3	NA	0.002
Tanduay Distillers	NA	NA	126	4.0	NA	0.027
San Miguel Pure Foods	NA	NA	55	1.8	NA	1.9

Note: Revenue for Nestlé, Starbucks and Monster Energy is based on global information



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