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THE PHILIPPINE MANNING SERVICE INDUSTRY: PROSPECTS AND IMPACT ON THE PHILIPPINE ECONOMY AND INDUSTRY DEVELOPMENT POLICY

11 November 2025 |
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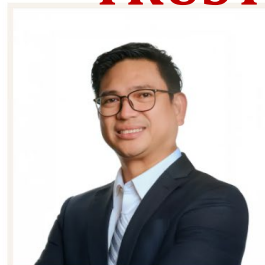
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Döhle Seafront Crewing (Manila), Inc.
CHAIRPERSON



CAPTAIN ANTONIO T. LADERA III
Open Sea Crewing Agency Inc
PRESIDENT



CHIEF ENGINEER JESSIE REX MARTIN
Anglo-Eastern Crew Management
Philippines Inc



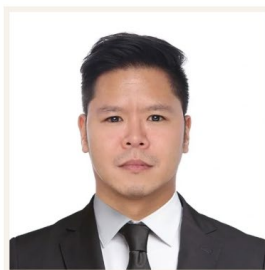
CHIEF OFFICER JAY BABERA
OSM Thome



CAPTAIN GREGORY NICK SEVILLA
Avior Marine Inc.



CHIEF ENGINEER JEAN VINCENT ABOBO
Solstad Offshore Crewing Services Phil.Inc.



MR. PAUL GALVEZ
Marlow Navigation Phils. Inc.



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THE PHILIPPINE MANNING SERVICE INDUSTRY:

Prospects and Impact on the Philippine Economy and Industry Development Policy

Dr. Winston Conrad B. Padojinog

Professor of Strategic Management and Industrial Economics

President, Center for Research and Communication

11 November 2025 | Shangri-La The Fort, Manila

THE PHILIPPINE MANNING SERVICE INDUSTRY

PART I

A HIDDEN ECONOMIC POWERHOUSE

- One of the biggest engines of the Philippine economy is not on land—it is at sea.
- Foreign shipowners choose Filipino seafarers year after year.
- Their salaries fuel Philippine households, businesses, and communities.



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KEY DATA

₱1.47T



Sea-based remittances (2021–2024)

₱366.8 Billion average per year

19.6% of all OFW remittances

1.6% of GDP

**“This industry quietly contributes ₱1 Trillion a year
to the Philippine economy.”**

THE PHILIPPINE MANNING SERVICE INDUSTRY



KEY DATA:

₱286.8 Billion
spent yearly by
seafarer
households

Where it goes:

Expenditures	2021	2024
Food consumed at home (agriculture and fishery)	6.18	5.89
Food consumed at home (food manufacturing)	30.15	28.77
Food regularly consumed outside the home	2.98	4.35
Housing	19.53	17.89
Water, electricity, gas, and other fuels	5.83	5.34
Health	4.25	3.70
Transport	5.35	6.31
Information and communication	3.75	3.58
Education	1.89	4.31
Personal care, social protection, and miscellaneous goods and services	4.67	3.72

Table 1.
Spending for
Goods &
Services by
Households
dependent on
Sea-based
Remittances (%)

THE PHILIPPINE MANNING SERVICE INDUSTRY



KEY DATA:

And the multiplier is massive:

Every ₱1 spent becomes ₱3 in the Philippine economy

Expenditures	2024	Output Multipliers	HH Income Multipliers
Food consumed at home (agriculture and fishery)	5.89	3.0	.45
Food consumed at home (food manufacturing)	28.77	3.27	.43
Food regularly consumed outside the home	4.35	3.36	.46
Housing	17.89	1.71	.15
Water, electricity, gas, and other fuels	5.34	2.42	.30
Health	3.70	2.44	.42
Transport	6.31	3.4	.51
Information and communication	3.58	2.9	.45
Education	4.31	3.34	1.02
Personal care, social protection, and miscellaneous goods and services	3.72	3.31	.39

Table 2.
Expenditures with output multipliers

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EVERY REMITTANCE POWERS LOCAL COMMUNITIES

When a Filipino seafarer sends money home, the 3x multiplier simply explained:



His family buys
rice/bread



The sari-sari
store restocks



The delivery
rider earns a
fare



The bakery
buys flour



Farmers, truckers,
mills, and workers
get income

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MAJOR POINT:

**“Every time a Filipino seafarer sends
₱1 home, it becomes ₱3 for the
Philippine economy.”**

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PART II: UNKNOWN FACT

SHIPOWNERS' SPENDING INSIDE THE PHILIPPINES (BEFORE DEPLOYMENT)

The remittances of seafarer wages are recognized. The multiplier of 3x we have studied and explained in previous slides. HOWEVER, before a seafarer even steps on a ship, foreign shipowners spend money INSIDE the Philippines.



In 2024 alone, shipowners spent

₱54.3 Billion

in the Philippines

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₱54.3 BILLION- HOW IT IS SPENT:

61.3% 8.4% 1.1% 1.2%

Training &
Education

Accommodation

Clothing &
Garments

Food &
Beverage

2.4%

4.1%

4.6%

0.1%

Government
Fees

Financial
Services

Medical
Services

Professional
Services

THE PHILIPPINE MANNING SERVICE INDUSTRY



SHIPOWNERS' SPENDING INSIDE THE PHILIPPINES (BEFORE DEPLOYMENT)

This is not remittance: This is foreign investment flowing directly into Philippine businesses.

BSP on Seafarers' Remittances

BSP counts only wages and cash allowances sent home by seafarers

Reimbursements for medical, travel, training, documents, etc. are not counted

These are treated as business payments, not remittances

Rule follows IMF BPM6

“Shipowners inject **₱54.3 Billion** into the Philippine economy before a single sailor steps on board.”

THE PHILIPPINE MANNING SERVICE INDUSTRY



₱1 SPENT ON PRE-EMPLOYMENT SPENDING ON TRAINING, MEDICALS, CLOTHING (PPES), ETC. BECOMES ₱3 IN THE ECONOMY

Shipowner spending ripples through:

Expenditures	2024	Output Multipliers	HH Income Multipliers
Food consumed at home (agriculture and fishery)	5.89	3.0	.45
Food consumed at home (food manufacturing)	28.77	3.27	.43
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THE PHILIPPINE MANNING SERVICE INDUSTRY

PART III

WHAT
SHIPOWNERS
AND
SEAFARERS
CONTRIBUTE
(2024) IN
TOTAL



Impact	Direct Impact	Total Impact	Impact on Household Incomes	Jobs Generated
Shipowners transfers to manning agencies (before deployment)	Php 54.3B	Php 174.9B	Php 43.7B	116,155
Seafarers' remittances send via manning agencies (after deployment)	Php 277.4B	Php 888.4B	Php 106.4B	282,684
Total Impact	Php 331.7B	Php 1.06 T	Php 150.1B	398,839
Summary impact	2.2% of GDP	4.0% of GDP	1.5% of HH incomes	0.8% of total employment

THE PHILIPPINE MANNING SERVICE INDUSTRY



**₱1 SPENT BY A SEAFARER AND BY THE SHIPOWNER
ON PRE EMPLOYMENT COSTS BECOME MORE THAN
₱3 OF INCOME FOR THE PHILIPPINES.**

THE PHILIPPINE MANNING SERVICE INDUSTRY



OVERALL CONCLUSION:

HOW SHIPOWNERS DRIVE THE PH ECONOMY

Because foreign shipowners hire Filipino crew, in 2024:

₱1.06 Trillion

total economic activity

398,839 Jobs

supported nationwide

₱150.1 Billion

in household income

4.0%

of Philippine GDP

0.8%

of national employment

THE PHILIPPINE MANNING SERVICE INDUSTRY



OVERALL CONCLUSION:
TOTAL IMPACT

₱331.7B

Direct impact

₱1.06T

Total impact after multipliers

THE PHILIPPINE MANNING SERVICE INDUSTRY



THE PARTNERSHIP THAT BUILT THE WORLD'S #1 MARITIME WORKFORCE

- Government + industry created strong labor standards
- Training and certification built global trust
- Filipino seafarers became the world's preferred crew

Secondary Data
Collection
Remittance data
from DMW
Filipino
household
spending
behavior

Primary Data
Collection
Survey and
Workshop with the
Association of
Licensed Manning
Agencies (ALMA)
Shipowner
transfers

Estimation of
industry
multipliers
Remittances +
transfers
Application to
industry
multipliers

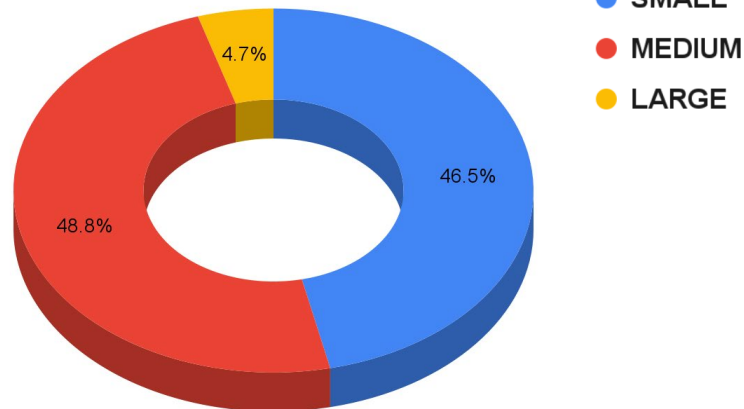
Economic
impact
Direct impact
Output
Household
income
Employment

THE PHILIPPINE MANNING SERVICE INDUSTRY



METHODOLOGY

DISTRIBUTION OF LICENSED MANNING AGENCIES RESPONDENTS BY SIZE



RESPONDENTS' PROFILE

- 11.6% of 370 licensed manning agencies
- 55% of 78 ALMA members
- Accounted for 26% of total Philippine deployment or
- 77% of ALMA members' regular deployment

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MAJOR POINT:

**“We became NUMBER ONE (#1)
because of strong institutions. We
must keep that strength.”**

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WHAT HAPPENS WHEN CONFIDENCE IS LOST

IF...

- ... Policies become unpredictable
- ... Claims are unreasonable & unfair
- ... Penalties become blanket
- ... Taxes feel arbitrary
- ... Legislative reforms are attacked

Shipowners
don't argue.
They quietly
move contracts.

LOSSES TO THE PHILIPPINES:

- ₱1.06 Trillion economic activity
- ₱150.1 Billion household income
- 398,839 jobs
- 4% of GDP

THE PHILIPPINE MANNING SERVICE INDUSTRY



14% from 2015 to 2025



Source: Compiled by Authors from Drewry (2016), Drewry (2021), Drewry (2023), Drewry (2024), and Drewry (2025)

Currently, the number of Filipino deployment is calculate as a percentage of total seafarers employed onboard.

This is not accurate because it fails to account for multiple deployments per slot, which can inflate deployment numbers and misrepresent the actual market share. The only data available that compares crew onboard with jobs onboard ships is the Drewry Reports.

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MAJOR POINT:

**“In global shipping, when confidence
breaks—ships leave.”**

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SOLUTIONS: NATION-BUILDING TOGETHER

“Blue Check” Manning Agency Certification

- Voluntary government accreditation
- Rewards compliant, ethical agencies
- Replaces blanket suspensions with targeted accountability



Tiered Penalty & Enforcement Matrix

- First offense → corrective action plan
- Repeat/serious cases → targeted sanctions
- Only severe, proven cases → cancellation
- Protects compliant agencies and investments
- Predictable rules = regulatory stability



Defend Key Magna Carta Reforms

- Protect anti-ambulance chasing reforms
- Uphold EMSA compliance provisions
- Weakening these threatens PH credibility
- Risk: foreign vessels reduce Filipino hiring
- Protect reforms = protect jobs



THE PHILIPPINE MANNING SERVICE INDUSTRY



SOLUTIONS: NATION-BUILDING TOGETHER

Modernized Arbitration System

- Stronger NCMB procedures and evidence standards
- Higher arbitrator qualifications, ethics, and presidential appointment
- Fast, fair, credible dispute resolution
- Protects both seafarers and shipowners



Transparent Digital Tax Administration

- No-contact digital audits
- Published audit rules + fixed closure timelines
- Online LOA tracking
- Independent review panel for disputes
- Predictable, investor-friendly system



**Builds
shipowner
confidence**

THE PHILIPPINE MANNING SERVICE INDUSTRY



MAJOR POINT:

**“Good policy doesn’t protect
companies—it protects Filipino jobs
and families.”**

THE PHILIPPINE MANNING SERVICE INDUSTRY



MARITIME SERVICES THE PHILIPPINES CAN BUILD: THE BEST REINTEGRATION PLAN

- ✓ Ship Management
- ✓ Crew Management
- ✓ Technical & Engineering Services
- ✓ Safety, Compliance & Audit Services
- ✓ Advanced Maritime Training & Simulation Centers
- ✓ Maritime Cybersecurity & Tech Services

- ✓ Chartering & Commercial Operations
- ✓ Specialized Surveying & Inspection
- ✓ Environmental & Decarbonization Services
- ✓ Crisis & Emergency Response Centers
- ✓ Crew Change Hubs
- ✓ Bunkering sites

THE PHILIPPINE MANNING SERVICE INDUSTRY



MARITIME SERVICES THE PHILIPPINES CAN BUILD: THE BEST REINTEGRATION PLAN

This is the best reintegration plan because Filipino seafarers are already highly trained and globally experienced, paid for by shipowners, not by government. Instead of retraining retired seafarers into industries that are new to them, we can build ship management and maritime service industries here at home.

This keeps high-income maritime careers in the Philippines and brings global shipping revenue into the local economy. But it will only happen if the government ensures a predictable regulatory and justice system, rules-based regulation, and clear, fair taxes. **With stability and trust, shipowners will invest, and Filipino seafarers can build a world-class industry on our own shores.**

THE PHILIPPINE MANNING SERVICE INDUSTRY



WHY SHIPOWNERS KEEP CHOOSING FILIPINOS

- Maritime culture
- Strong English
- Discipline & loyalty
- Less desertion
- Long contracts
- Global trust built over decades

MAJOR POINT:

**“Every Filipino at sea
means a Filipino
family on land has
hope.”**



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The Philippine Manning Service Industry: Prospects and Impact on the Philippine Economy and Industry Development Policy

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and Communication

Php1.06 Trillion Total Economic Impact (2024)
4% of Philippine GDP

SHIPOWNER SPENDING BEFORE DEPLOYMENT

Money enters the Philippines
even before a sailor steps on a ship.

2024 Impact:

- **Php54.3B** direct spending
- **Php174.9B** total economic activity
- **Php43.7B** household income
- **116,155** Filipino jobs

» training | medical | uniforms
hotels | government fees

SEAFARER REMITTANCES

Every Php1.00 sent home becomes
nearly Php3.00 in the economy.

2024 Impact:

- **Php277.4B** direct remittances
- **Php888.4B** total economic activity
- **Php106.4B** household income
- **282,684** Filipino jobs

» food | housing | transport
education | local services



Php331.7B

DIRECT IMPACT



Php150.1B

HOUSEHOLD INCOME



398,839

JOBS SUPPORTED

**₱1.06
TRILLION**

TOTAL IMPACT/BENEFIT TO THE NATION

**“When we protect the seafaring
industry, we protect
families, jobs, and 4% of the
entire Philippine economy.”**

THE PHILIPPINE MANNING SERVICE INDUSTRY



“The Filipino seafarer never asks for subsidies: only that shipowners can keep choosing the Philippines.”



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THANK YOU!

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