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Industry Career Guide: Wholesale and Retail Trade

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INDUSTRY CAREER

GUIDE

WHOLESALE AND RETAIL TRADE

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Executive Summary

The Wholesale and Retail Trade (WRT) industry belongs to the services sector. In the Philippines, it is generally composed of three divisions, namely:

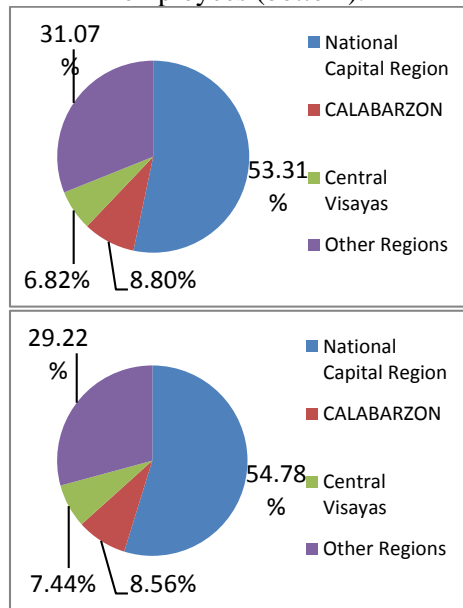
Division 50, which consist of Sale, Maintenance and Repair of Motor Vehicles and Motorcycles, Retail Sale of Automotive Fuel, Division 51, on the other hand, which consist of Wholesale Trade and Commission Trade, Except of Motor Vehicles and Motorcycles, and Division 52, consisting of Retail Trade, Except of Motor Vehicles and Motorcycles, Repair of Personal and Household Goods.

The performance of Wholesale and Retail Trade sector steadily grew at average annual rates of 4.38%, 5.89% and 4.15% in 1996-2000, 2001-2005 and 2006-2009, respectively and with the exception of 2006-2009, the sector's average annual rates of expansion were consistently higher than that of the country's gross domestic product (GDP). Moreover, the share of the retail sub-sector to the Philippines' GDP and GNP ranged from 11% to 13% and 10% to 11%, respectively, from 1996 to 2009 versus the wholesale sub-sector's roughly 4% contribution to GDP and GNP during the same 14 years.

Consequently, the wholesale and retail industry has become one of the Philippines largest employers accounting for an estimated 19% of the country's total employment in 2006-2009. In 2010, the NSO's Philippine Statistical Yearbook reported a 3.72% increase in wholesale and retail trade employment level – from 2009's 6.9 million to 2010's 7.2 million. Considering total Philippine employment rose by less than 3% - from 35.48 million in 2009 to 36.49 million in 2010, the wholesale and retail trade's share to total Philippine employment for the year rose from 19.45% in 2009 to 19.73% in 2010.

Further, the 2009 Annual Survey of Philippine Business and Industry (ASPBI) revealed that more than 50% of the wholesale and retail industry establishments that employed twenty or more workers were located in the National Capital Region (53.31%) as can be seen in Figure 1a. Regions IV-A (CALABARZON) and VII (Central Visayas) were the second and third popular destinations of WRT firms with shares of 8.8% and 6.82%, respectively. Correspondingly, as seen in Figure 1b, these regions had the highest shares in the total number of WRT employees with 54.78% for NCR, 8.56% for Region VII and 7.44% for Region IVA.

Figure 1. a.) 2009 Regional distribution of WRT establishments that employ 20 or more workers (top) and b.) Regional distributions of WRT employees (bottom).



source: 2009 ASPBI

Additionally, the average number of employees per establishment in wholesale and retail industry in 2009 ranged from 6 to 43 workers (ASPBI, 2009). In terms of occupations, the industry employs a wide range of workers with varying skills – from professionals that require intensive and specialized education and training (i.e., branch and supply chain managers, human resource officers, display designers, and visual merchandisers) to staff positions for which general education is sufficient (such as cashiers and stock clerks). Critical determinants of success and career advancement in the sector – primary of which is education – are work experience and personal qualities like trainability and flexibility, neat and pleasing appearance, presence of mind and highly-developed comprehension skills; ability to answer questions as well as the knack to persuade, convince and, thus, sell their products- which were summarized into the summarized into the three “Ps”: personal appearance, public relation skills, and patience.

According to the National Statistics Office (NSO) database, the average daily pay in the wholesale and retail industry grew by an average of

4.84% per year from 2006's PhP227.34 per day to 2010's PhP 274.54 per day. The WRT's average daily pay was consistently below that of the compensation received by employees in all industries - for instance, the average daily pay for all industries was 10.44% more than that of the WRT in 2010 - and the manufacturing sector - for example, 13.13% higher than that of the WRT in 2010 - during the five-year period.

In addition, workers in wholesale and retail industry, particularly if they are permanent employees and if they belong to a union, are entitled to leave (i.e., sick and maternity leaves) and welfare benefits that supplement their incomes and provide means by which workers can cope with emergencies like hospitalization and natural disasters.

The protection of the law, specifically those which governs compensation, is extended to the employees of establishments with no more than ten (10) workers are likewise protected through the Labor Code provisions for small- and medium-scale industries. Accordingly, workers belonging to enterprises with no more than ten (10) laborers are assured of: 1) pay that is at least equal to the minimum wage; 2) seventy-five percent of the statutory wage rate for apprentices, learners and handicapped laborers; 3) holiday pay when required to work on declared holidays or special days; 4) premium and overtime pay when applicable; 5) service incentive leaves; 6) 13th month pay; 7) SSS registration; 8) maternity benefits; 9) paternity benefits; and 10) employer's tax compliance (Basic Philippine Labor Laws and Regulations, 2003-2013).

According to the Bangko Sentral ng Pilipinas (BSP), general business optimism improved for the first two quarters of 2012 as evidenced by the rise in the overall confidence index for the fourth quarter to 44.5% relative to 40.5% in the first quarter of 2012. Businesses claim that the continued optimism "due to an increase in orders and new contracts/projects leading to higher volume of production, expansion of business and new product lines, increased government spending and the seasonal uptick in demand during summer, enrolment and harvest seasons". Economic expansion is expected for the coming quarters although growth is expected to slow down for the WRT sector due to the rainy season, high electricity costs and stiff domestic competition.

On the consumer side, households within NCR sought to buy more consumer durables and motor vehicles in the first quarter, expecting demand for such big-ticket items to increase in the coming quarters while

those households in the regions continue to prioritize food and other basic needs over consumer durables, house and lot and motor vehicles .

Demand for workers in the industry across occupations is expected to steadily increase in the short- to medium-term owing to the following factors: 1) potential for and overall actual growth of the industry; 2) the increasing channels of trade within the country; and 3) capacity and site expansion of big players in the sector. As access of consumers to wholesale and retail service through the increasing number of outlets, branches and factories of existing players and new entrants as well as the new modes of buying and selling (i.e., mail order, internet sales, etc.) should also give employment in the WRT sector (i.e., demand for sales persons, clerks, accounts managers, automotive servicers, etc.) a consistent boost during the same period. The 5-6% Philippine national income growth in 2012 also bodes well for an industry that, in general, is responsible for delivering the most basic needs of consumers.

Chapter I

Nature of the Industry

A. Service-oriented Industry

The Wholesale and Retail Trade industry belongs to the service sector. Enterprises belonging to the sector are engaged in the distribution – not the production – of all types of durable and non-durable goods to the household, in the case of retail trade, and other firms, in the case of wholesale trade.

B. Industry Sub-Sectors

i. Type of Establishments

The WRT industry belongs to the services sector. In the Philippines, it is generally composed of three divisions; namely, Sale, Maintenance and Repair of Motor Vehicles and Motorcycle and Retail, Sale of Automotive Fuel (Division 50), Wholesale Trade and Commission Trade, except of Motor Vehicles and Motorcycles (Division 51), and Retail Trade, except of Motor Vehicles and Motorcycles, Repair of Personal and Household Goods (Division 52) (refer to Annex 1: Wholesale and Retail Trade Industry Sub-categories).

For Divisions 50 and 51, these specifically include resale (sale without transformation) of new and used good to retailers, to industrial, commercial, institutional or professional users, other wholesalers, or acting as agents in buying merchandise for, or selling merchandise to, such persons or companies. It also include activities of wholesale merchants, jobbers, industrial distributors, exporters, importers, co-operative buying associations, merchandise merchants and agents and assemblers, buyers and co-operative associations engaged in the marketing of farm products (NSCB, 2005).

In addition, Division 50 includes manipulations involved in wholesale such as assembling, sorting, and grading of goods in large lots, break bulks, repacking and bottling, redistribution in smaller lots, e.g., pharmaceuticals, storage, refrigeration, delivery and installation of goods on own account; packaging of solid goods and bottling of liquid or gaseous goods, including the blending and

filtering on own account” while Division 51 includes merchant wholesalers, i.e., who take title to the goods they sell, such as wholesale merchants or jobbers, industrial distributors, exporters, importers, terminal elevators, and cooperative buying associations, sales branches and sales offices (but not retail stores) which are maintained by manufacturing or mining units apart from their plants or mines for the purpose of marketing their products and which do not merely take orders to be filled by direct shipments from the plants of mines.

As to Division 52, it includes the re-sales (sale without transformation) of new and used goods to the general public for personal or household consumption or utilization, by shops, department stores, stalls, mail-order houses, hawkers and peddlers, consumer cooperatives, auction houses, etc. Most retailers take title to the goods they sell, but some act as agents for a principal and sell either on consignment or on a commission basis; establishments engaged in selling to the general public, from displayed merchandise, products such as typewriters, stationery, paint or lumber, though these sales may not be for personal or household consumption or use only. The goods sold in this group are for obvious reasons limited to so called consumer goods.

The first Division on retail trade (not including motor vehicles and household goods) is grouped into six: (1) non-specialized retail trade in stores, (2) other retail trade of new goods in specialized stores, (3) repair of personal and household goods, (4) retail sale of food, beverages and tobacco in specialized stores, (5) retail sale of second-hand goods in stores, and (6) retail trade not in stores. As of 2009, the Division generated PhP 683,567,290 in revenues which comprised of 42.52% of the entire gross revenue of the wholesale and retail trade industry which grew by nearly PhP 84 million since 2008.

The 2009 ASPBI Special Report revealed that the wholesale and retail industry comprised of 59,398 establishments of all sizes. The other retail trade of new goods in specialized stores dominated the industry in terms of the number of establishments with a share of 51.1%. The balance of the enterprises was ranked as: second, other industries at 27.3%; third, non-specialized retail trade stores, 6.8%; fourth, retail sale of food, beverages and tobacco in specialized stores, 5.6%; fifth, wholesale of household goods, 4.7%; and sixth,

wholesale of agricultural raw materials, live animals, food, beverages and tobacco, 4.5% (refer to Annex 2: Regional Analysis of the 2009 ASPI Data for the Overall Wholesale and Retail Trade Industry for Establishments with Twenty or More Employees).

Micro- and small-scale enterprises dominated the sale, maintenance and repair of motor vehicles and motorcycles, retail sale of automotive fuel sub-sector in 2003 and 2005.

ii. Regional Distribution/Concentration of Industry Activity

Except for the Autonomous Region of Muslim Mindanao (ARMM), establishments with twenty or more average total employees belonging to the sale, maintenance and repair of motor vehicles and motorcycles, retail sale of automotive fuel sub-sector of the wholesale and retail industry were found in all regions of the Philippines in 2003 and 2005. Overall, these larger establishments in the sub-sector grew by 41.37% in number from 730 in 2003 to 1,032 in 2005. The regions that were most attractive to new establishments with twenty or more average total employees during the period were Region V (250%), Region II (100%), CAR (75%), Region I (75%) and Region VI (72.41%). Indeed, all five provinces grew faster than 41.37% rate of expansion in the number of firms in the sub-sector with twenty or more average total employees in 2005.

In addition, the data gathering efforts of the NSO also revealed that majority of the larger establishments in the sale, maintenance and repair of motor vehicles and motorcycles, retail sale of automotive fuel sub-sector of the wholesale and retail industry in 2005 were concentrated in the National Capital Region (44.38%), Region IVA (12.21%) and Region III (9.98%). Correspondingly, more than half (53%) of the total number of laborers who worked in establishments in the sub-sector with twenty or more average total employees was employed by firms located in the NCR in 2005 (refer to Table 2). Region IVA and Region III were distant second and third, employing 10.77% and 8.93%, respectively, of workers in the larger establishment in the sector during the same year.

Apparent, therefore, in the results of the NSO's 2003 and 2005 surveys is the concentration of firms in the sale, maintenance and repair of motor vehicles and motorcycles, retail sale of automotive

fuel sub-sector of the wholesale and retail industry with twenty or more average total employment in the NCR.

C. Economic Profile

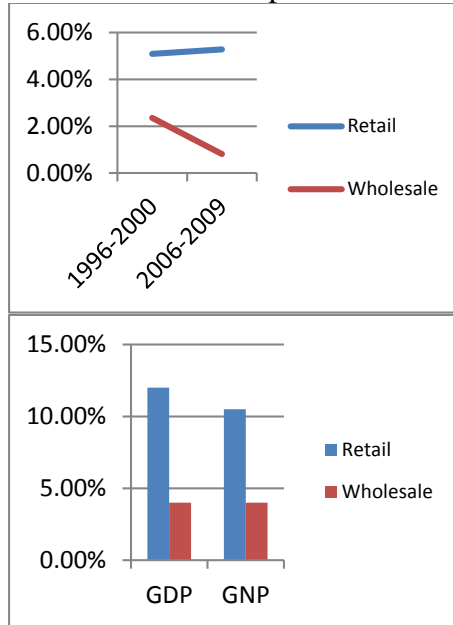
The discussion of the Wholesale and Retail sector in the succeeding section centers on the industry's performance, contribution to the Philippine national income and employment, industry organizations and the recent development in the sector.

i. Contribution to Philippine GDP

The WRT sector steadily grew at average annual rates of 4.38%, 5.89% and 4.15% in 1996-2000, 2001-2005 and 2006-2009, With the exception of 2006-2009, the sector's average annual rates of expansion were consistently higher than that of the country's gross domestic product.

The slower pace of WRT expansion in 2006-2009 are attributed to the consequences of the then on-going global financial crisis that cut consumer spending, in particular, and resulted in a barely 1% increase in the industry's gross value added in 2008 and 2009, 1.25% and 1.02%, respectively The data reveals the dominance of the retail sub-sector both in the rate of growth and share to the Philippines' national output. As may be seen in Figure 2a, the retail sub-sector's average annual growth rates were 5.09% in 1996-2000 and 5.28% in 2006-2009 as compared to the wholesale sub-sector's 2.36% and 0.81%, respectively, during the same period. Similarly, the share of the retail sub-sector to the Philippines' GDP and GNP ranged from 11% to 13% and 10% to 11%, respectively, from 1996 to 2009 versus the wholesale sub-sector's roughly 4% contribution to GDP and GNP during the same 14 years (Figure 2b).

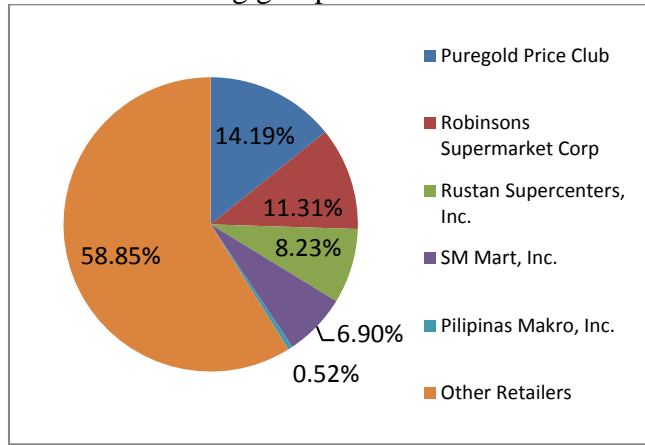
Figure 2. a.) Average annual growth rates of the retail and wholesale sub-sectors for the periods 1996-2000 and 2006-2009 (top); b.) Average share of the retail and wholesale sub-sectors to GDP and GNP for the period 1996-2009 (bottom).



source: NSO

As of 2009, the group generated 169,901,542PHP in revenue, which comprised 24.86% of the division's revenue and 10.57% of the total wholesale and retail trade industry. As seen in figure 3, the leading corporation for the group is the Puregold Price Club which generated up to 24,112,391PHP in revenue (14.19% of the group and 3.53% of the division) in 2009. Followed by Robinsons Supermarket Corp, Rustan Supercenters Inc, SM Mart, Inc., Pilipinas Makro, Inc. (which comprised 11.31%, 8.23%, 6.9% and 0.52% of the group's revenue respectively), these top five corporations dominate nearly 41.18% of the group's gross revenue. The net incomes after tax and the shareholders' equity have generally increased from 2008 to 2009 except Robinsons Supermarket Corp. whose net income after tax decreased slightly since 2008.

Figure 3. Share of the top 5 retailing companies to the retailing group revenue 2009.



source: Philippines' Profiles and Perspectives, Inc., (2011)

ii. Distribution of Employment (Employment Size) in the Identified Sub-sectors

The wholesale and retail industry is one of the Philippines largest employers accounting for an estimated 19% of the country's total employment in 2006-2009. In addition, the sector's rate of employment growth was consistently been higher – except in 2007 - than that of the country's total employment expansion rate. In 2010, the NSO's Philippine Statistical Yearbook reported a 3.72% increase in wholesale and retail trade employment level – from 2009's 6.9 million to 2010's 7.2 million. Since total Philippine employment rose by less than 3% - from 35.48 million in 2009 to 36.49 million in 2010, the wholesale and retail trade's share to total Philippine employment for the year rose from 19.45% in 2009 to 19.73% in 2010. The 2010 WRT share to total employment was also higher than the 2006-2009 average share of 18.86% (refer to Table 1).

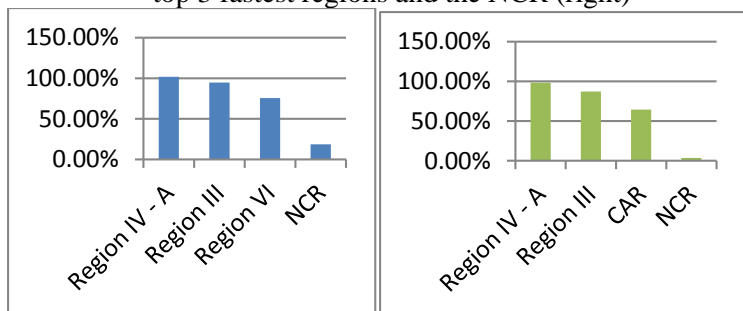
According to the Department of Labor and Employment – Bureau of Labor and Employment Statistics Integrated Survey (2012), the rate of employment in the local wholesale and trade industry continued to accelerate at a faster rate than total Philippine employment in 2011, 5.19% relative to the country's 3.21% rate of increase. The same database yielded a 20.04%

WRT employment share to total Philippine employment during the same year

Unfortunately, the 2010 macroeconomic data published in the Philippine Statistical Yearbook did not include sectoral or industry-specific gross value added; thus, output comparisons between the macro economy and the wholesale and retail trade beyond 2009 cannot be made.

According to the NSO's surveys, the fastest growing regions in terms of the number of establishments and total employment in the wholesale trade and commission trade, except of motor vehicles and motorcycles sub-sector with twenty or more average total employees in 2005 were Region IVA (101.75%), Region III (94.64%) and Region VI (75.56%) (as seen in Figure 4a) and Region IVA (98.33%), Region III (87.26%) and CAR (64.46%) (as seen in Figure 4b), respectively. These regions' rates of expansion were higher than the NCR's (18.61% and 3.67%, respectively), which dominated the sub-sector in terms of size and employment levels, and the entire sub-sector's (29.95% and 13.61%, respectively) growth rates during the same year.

Figure 4. a.) Growth rates of establishments of the top 3 fastest regions and the NCR (left); b.) Growth rates of employees of the top 3 fastest regions and the NCR (right)

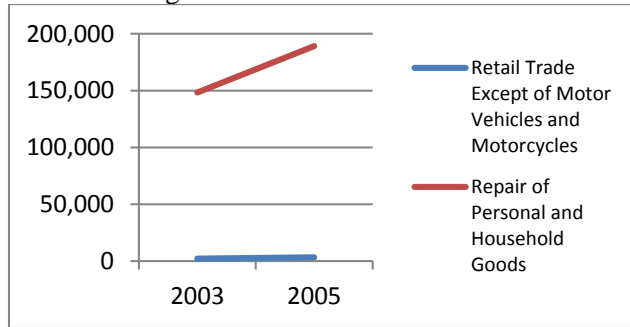


source: NSO

As seen in figure 5, according to the NSO's Annual Survey of Philippine Business and Industry, the number of establishments and total employment with twenty or more average total employees in the retail trade, except of motor vehicles and motorcycles, and repair of personal and household hoods of the wholesale and retail industry grew by 48.79% and 27.56%,

respectively, from 2003's 2,232 and 148,322, respectively to 2005's 3,321 and 189,196, respectively (refer to Table 4).

Figure 5. Growth of establishments for the retail trade except of motor vehicles and motorcycles, and repair of personal and household goods sub-sectors from 2003 to 2005.

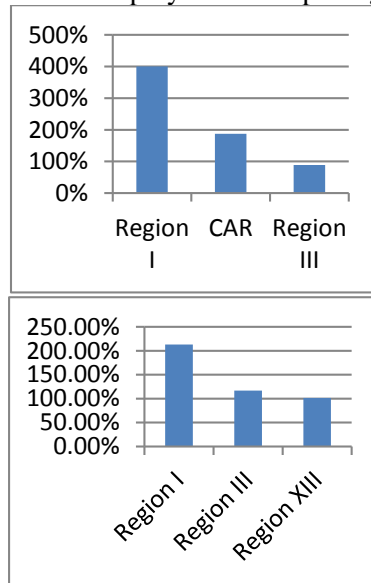


source: ASPBI

In terms of rates of increase, new firms in the sub-sector chose to locate in Region I, where the number of enterprises in the sub-sector almost quadrupled, CAR, with a 187.5% growth rate, and Region III, with an 88.98% rate of expansion as seen in Figure 6a. The regions that posted the highest growth rates in total employment relative to all other regions in the country in 2005 may be seen in Figure 6b as Region I, 212.94%; Region III, 116.87%; and Region XIII, 101.25% (refer to Table 4 for actual levels).

Similar to the two other sub-sectors of WRT, the NCR is the popular location choice for majority of the establishments with twenty or more average total employees in the retail trade, except of motor vehicles and motorcycles repair of personal and household goods. In fact, the NSO 2005 survey reported that 41.47% of the total number of firms and 42.84% of total employment in the sub-sector originated from the National Capital Region .

Figure 6. a.) Growth rate of establishments of top 3 regions (left); b.) Growth rate of employment of top 3 regions (right)



source: ASPBI

iii. Industry Organizations relative to the Sub-Sectors

The WRT industry establishments can belong to any number of professional organizations including, but not limited to, the Trade Marketers Association of the Philippines (TMAP), Philippine Retailers Association (PRA), Philippine Chamber of Commerce and Industry (PCCI), Philippine Association of Supermarkets, Inc. (PASI), Association of Home Appliances Manufacturers, Packaging Institute of the Philippines (PIP), Philippine Franchise Association (PFA). Owing to the vast spectrum of goods and services the wholesale and retail industry covers, specialties within specific sub-sectors have given rise to additional professional organizations – the principal goal of each one is to develop the competitiveness of the firms in the sector by harnessing and focusing the support provided by the government, non-government organizations, business organizations, and individual enterprises. Industry organizations, among others, help establish local and global marketing and distribution networks, conduct trainings, provide market information (i.e., trends, technology, processes, etc.), and support initiatives/lobbies that benefit industry stakeholders.

iv. Recent Developments for the Past 3 to 5 Years

The passage of the Retail Trade Liberalization Act of 2000 has significantly influenced the Philippine WRT industry growth and development in the 21st century. This facilitated the entry/expansion of foreign-owned retail enterprises either through partnerships with local entrepreneurs or 100% ownerships— like Watson, President Chain, SHV Makro, Pricemart, and others etc. (Romo, Dugal & Reardon, 2009). Growing competition –combined with increasing incomes, improving soft and hard infrastructure, and evolving consumer needs and preferences, resulted in the introduction of innovations such as changes in store formats (i.e., warehouse club stores like S&R), bar coding, internet shopping, “efficient consumer response (ECR) techniques, centralized distribution centers and direct purchase from suppliers” Warehouse clubs offer lower priced goods by selling items by bulk, thereby eliminating the middle man, and spending less on decorations, displays, and even manpower (employ fewer workers relative to retail outlets). Warehouse clubs also charge customers annual membership fees for the privilege of shopping in their establishments. Bar coding is a technology that enables shops to electronically scan and price merchandise. Other than expediting the process of tabulating sales per customer, it is a tracking device that helps establishments maintain just-in-time inventory and, thus, minimize inventory cost. Lastly, internet shopping, an increasingly popular method of acquiring goods and services (i.e., clothes, music, computer software and airline tickets), allows customers to make purchases without having to physically visit stores.

Access to goods that may not be available in the domestic market is made possible to local clients by visiting websites and having the goods shipped directly to clients. An excellent example of internet purchases is books. International book retailers, for example, offer a wide range of new, second-hand, and rare or out-of-print books to their customers worldwide through networks of book dealers).

Indeed, e-commerce – retailing via the internet – joins the rank of newer forms of retailing in the Philippines, which includes

mail order and teleshopping. While not yet as popular in the Philippines as in more developed countries like the United States, these new modes of shopping are making in-roads by providing access to products that are not available in the local market. In addition, establishments in the WRT industry are adapting to the relatively more hectic lives of their consumers by offering “one-stop” shopping services. Supermarkets, for example, stock food, clothing, books, music, appliances and other dry goods. In-store pharmacies and automated teller machines (ATMs) or on-site bank branches, are also found in large grocery stores. Offering a wider variety of goods (i.e., clothes and household wares and appliances) and services (i.e., pharmacies) not only allows big supermarkets to attract more customers but also reap the benefits from economies of scale. More retailers (i.e., coffee shops and convenience stores) are also extending shop hours, if not remaining open 24/7 (twenty-four hours a day, seven days a week), to accommodate the needs of a growing number of customers working beyond the eight-to-five office hours.

Lastly, the literature on the industry documents the evolution of procurement system utilized by leading food retailers in the country. Cost reductions are also made possible by employing ECR techniques and establishing networks that among large manufacturers that “[deliver] large volumes of diverse products direct to the distribution centers of retailers small and large.

Chapter 2

General Employment

A. Occupations in the Sub-sectors

In general, the Wholesale and Retail Trade industry occupations is a mixture service workers and managerial and office workers. Service workers, who are tasked with assisting customers and keeping the stores stocked with merchandise, include sales personnel, cashiers and stock room clerks whereas managerial and office workers include consist of branch/operations managers, account executives, human resources officers, and display designer. Chapter 3 lists the specifics (i.e., educational and professional licensure requirement, professional job descriptions, average earnings, etc.) of each occupation.

B. Core of Occupations

In general, Wholesale and Retail Trade enterprises require a general manager, a sales personnel, a cashier and a stock room clerk. In small establishments, these functions are performed by one or two people. In sole proprietorships, these functions are carried out by family members.

C. In-Demand and Hard-to-Fill Occupations

The results of the Bureau of Labor and Employment Statistics (BLES) 2009-2010 Integrated Survey (BITS) identified a number of occupations in the wholesale and retail industry as hard-to-fill. The number of applicants per ten vacancies in the selected WRT occupations was as low as thirty-seven (supply and distribution managers) and as high as one thousand sixty (telemarketers) (refer to Table 1). Finding a suitable replacement for these WRT positions, according to BLES can be anywhere from one month, such as in the case of cashiers, to six months, particularly for telemarketers.

Table 1: Wholesale and Retail Trade Hard-to-Fill Occupations, 2010

Occupation	Number of Applicants per Ten Vacancies	Median Duration in Filling Up Vacancies (in months)
Accountants & Auditors	111	2.0
Accounting & Bookkeeping Clerks	73	2.0
Cashiers	49	1.0
Customer Service Representatives	115	2.0
Finance & Administrative Managers	85	2.0
General Manager in Wholesale & Retail Trade	201	6.0
Motor Vehicle Mechanics	40	2.0
Production & Sales Managers in Wholesale & Retail Trade	156	2.0
Sales & Marketing Managers	75	3.0
Sales Supervisors in Retail Trade	66	2.0
Sales Supervisors in Wholesale Trade	128	2.0
Shop Salespersons & Demonstrators	36	2.0
Stock Clerks	54	1.0
Supply & Distribution Managers	37	2.0
Technical & Commercial Sales Representatives	58	2.0
Telemarketers	1,060	6.0

source: Bureau of Labor and Employment Statistics, 2009/2010 BLES Integrated Survey

D. Basic Educational, Training, and Skill Requirements

While work experience is highly valued in the Wholesale and Retail industry, applicants with college degrees and/or apprenticeships are preferred for the managerial and office work positions. Vocational diplomas are likewise preferred for the sales associate posts, especially when vying for slots in large-scale WRT establishments. Specific basic educational, training and skill requirements are detailed in Chapter 3.

E. Professional Licensure Requirements

Occupations in the Wholesale and Retail Trade sector, specifically for service workers, give primary importance to work experience, apprenticeships and diplomas/certificates in non-degree or short courses such as Automotive Technology. Managerial and office

work positions, as mentioned in the preceding section, favor applicants with college degrees.

F. Personal Qualities

Workers in the wholesale and retail industry, particularly sales associates and cashiers, are generally young, below 30 years old. Owing to the nature of the posts, direct contact with customers, employers look for individuals with neat appearances, pleasant personalities, initiative, good communication skills, and possess businesslike manners. Individuals who are polite, friendly, tactful and genuinely interested in helping and working with customers would be successful in these occupations.

In addition, the project validation workshop held on 23 August 2012 with industry stakeholders revealed that retail trade workers, in particular, must also be customer-oriented, trainable, patient and flexible; have presence of mind and highly-developed comprehension skills; and possess the ability to answer questions as well as the knack to persuade, convince and, thus, sell their products. The participants of the validation workshop summarized these skills into the three “Ps”: personal appearance, public relation skills and patience (Validation Workshop, 2012).

In managerial positions (i.e., store/branch/operations managers, account managers, etc.) employers look for individuals who are trustworthy and who possess leadership skills, above average to excellent written and oral communications skills, problem-solving/analytical skills, and marketing and negotiation skills. Strong business acumen and the ability to attend to the needs of clients are also required.

Moreover, beyond the skills and competencies required in the Sale, Maintenance and Repair of Motor Vehicles and Motorcycles, Retail Sale of Automotive Fuel Sub-sector (i.e., broad and thorough knowledge of automobiles good reasoning and diagnostic abilities, etc.), service personnel, especially automotive technicians, must be physically fit and possess both interest and aptitude in science, mathematics, physics and chemistry (www.ble.gov.dole.gov.ph/jobdetail/auto-technician.htm).

Chapter 3

Industry Occupation

A. *Working Conditions*

i. *Nature of Employment in the Sub-sectors*

Depending on the firms that employ them as well as the season (i.e., holiday/Christmas), workers in the wholesale and retail industry are employed either on a full-time or part-time basis. Full-time employees, especially in the high-end retail subsector, work year-round and receive benefits after having successfully completed a six-month probationary period. By law, an employee's normal work hours cannot exceed eight hours per day or 48 hours per week

Establishments that operate more than eight hours a day (i.e., department stores), therefore, require shifting arrangements among their full-time sales associates and cashiers. The establishments may compel their employees to work more than eight hours per day but these individuals must be given overtime pay, which is 25% more than the regular hourly rate on an ordinary working day and, at least, 30% more than the regular hourly rate on a holiday or rest day. Part-time workers, on the other hand, render less than eight hours a day and, thus, less than 48 hours of service per week. Seasonal/contractual workers, especially those who are hired to help manage the expected increase in customers, for example during Christmas time, are normally given part-time positions or contracts subject to the regular daily/weekly work hours but expire before the six months of probationary period as prescribed by law

As mentioned in the previous section, micro, small- and medium-scale establishments in the retail subsector are mostly family-owned. Family members and an employee or two perform all necessary day-to-day tasks such as procuring supplies, managing inventory, attending to customers, etc.

ii. *Working Hours*

According to the NSO, wholesale and retail employees rendered an average of 49.98 hours of work per week from 2006 to 2010, which was more than the eight hours per week rendered by workers in all industries, all occupations, all class of workers, and even the self-employed during the same time period. Note

that the number of hours worked in the sector increased slightly, an average of 2.1% per year, from an average of 49.6 hours per week in 2007 to an average of 50 hours per week in 2010, peaking at an average of 50.6 hours per week in 2008.

Because of the nature of their work, WRT workers tend to render more hours of work per week as compared to employees and professionals employed in other sectors. Many convenience stores, for example, are open 24 hours a day, seven days a week.

iii. Working Environment

Firms in the WRT industry prefer employees who are young and trainable. A number of them are hired on part-time, temporary, and contractual basis (National Institute for Occupational Safety and Health, 2010). They work in shifts and are often called upon to report to the store during weekends and holidays, particularly those who are employed by establishments with 24/7 service hours. Full-time workers, for example supervisors and managers, are on-call forty to forty-four hours per week. They may also be required to do overtime work whenever the need arises.

Service workers are on their feet for majority of their time at the store. In assisting customers, sales personnel and stock room clerks may be asked to reach and climb on ladders or bend and stoop to secure items on the shelves and/or lift and carry heavy objects. Managers, cashiers, clerical staff and account executives, on the other hand, are usually relegated to office work. Although there are dusky, cramped, warm, and generally uncomfortable stores, stock rooms, and vehicle repair sites, most WRT establishments are clean and well-lighted.

Sales representatives normally travel between stores, suppliers, and/or clients' homes and offices; and, thus, work more than the customary forty hours per week. Some local sales representatives spend hours attending to their clients' needs at their homes and offices with the aid of computers and the internet. It is, however, still necessary for them to call on existing and potential clients frequently. The hours are "long and often irregular [but] sales representatives have the freedom to determine their own schedule"

iv. Benefits

Benefits supplement an employee's income and provide means by which a worker can cope with emergencies like hospitalization and natural disasters. Workers in wholesale and retail industry, particularly if they are permanent employees, are entitled to leave and welfare benefits.

Leave benefits such as sick and maternity leaves are guaranteed by law. Most welfare benefits, the other hand, are negotiated with management either by the employee or the union. Examples of leave and welfare benefits provided to wholesale and retail industry employees from 1993 to 1997 are listed in Table 1.

Most supplementary benefits come in the form of bonus pays such as performance and production bonuses and merit increases (refer to Table 2). Since they are over and above the agreed upon salaries, bonuses normally serve as an incentive and, thus, result in higher productivity. Bonus pays may be negotiated as part of a contract of service tied to certain levels of output. Essentially, however, bonuses are given at the discretion of the employer.

Table 2: Wholesale and Retail Trade Collective Bargaining Agreements with Economic Clauses Leave and Welfare Benefits 1993 to 1997

Leave Benefits		
Vacation	Maternity	Military Training
Sick	Paternity	Emergency
Birthday	Study/Scholarship/Sabbatical	Wedding
Bereavement/Burial	Pulmonary	Review/Bar
Welfare Benefits		
Medical/Dental	Calamity Loan	Transportation Services
Medicines	Baptismal Gift	Accidental Insurance
Hospitalization	Wedding Gift	Retirement Pay
Optical	Christmas Package	Life Insurance
Workers Education	Cooperative Fund	Cosmetic Allowance
Study Grants	Meal Subsidy	Family Planning Service
Death Benefit	Meal Allowance	Termination Pay
Educational Assistance	Product Discount	Recreational Activities
Health & Safety Equipment	Light & Water Allowances	Rice and Corn Allowance
Education Loan	Per Diems (Overtime)	Separation Pay
Birth Assistance	Per Diems (Field)	Health and Safety Shoes
	Transportation	Burial Aid
Christmas Party	Allowance	Gratuity Pay

source: Bureau of Labor Relations and Bureau of Labor and Employment Statistics

Table 2: Wholesale and Retail Trade Collective Bargaining Agreements with Economic Clauses Supplementary Benefits 1993 to 1997

Profit Sharing	Incentives	14 th Month Pay
Seniority	Performance Bonus	ECOLA
Longevity	Production Bonus	Cash Gift
Merit Increase	Signing Bonus	Uniform (clothing)
Attendance	Christmas Bonus	Uniform (allowance)

source: Bureau of Labor Relations

Bureau of Labor and Employment Statistics

v. Occupational Hazards

Employees in the wholesale and retail industry risk injuries as well as contracting diseases in the line of duty. According to the latest available data collected by the Bureau of Labor and Employment Statistics (BLES) , the frequency of work-related injuries rose at average rate of 25.91% per year from 1992's 13,660 to 1996's 29,980 (refer to Table 3). Except for the abrupt 83.63% spike 1995, the occurrence of work-related injuries has been declining steadily during the period.

Table 3: Wholesale and Retail Trade Industry Occupational Injuries in Establishments Employing 10 and Over, 1992-1996

		1992	1993	1994	1995	1996
Total	Work-Related Injuries	13,660	16,700	15,630	28,830	29,980
	Non-Disabling	9,640	10,690	13,070	25,070	27,170
	Disabling	4,020	6,010	2,560	3,760	2,810
Extent of Disability						
	Fatal	20	20	80	a	10
	Permanent Total Disability	0	0	40	50	0
	Permanent Partial Disability	40	30	80	80	50
	Temporary Total Disability	3,960	5,960	2,360	3,620	2,750

source: 2011 Yearbook of Labor Statistics
 (<http://www.bles.dole.gov.ph/PUBLICATIONS/2011%20YLS/chap13.html>)

Note: a Less than 5 cases

Non-disabling injuries accounted for an average share of 79.17% per annum of all work-related injuries during the five-year period. A closer analysis of the data reveals that there is a downward trend in the share of disabling injuries to total work-related injuries from 1993's 35.99% (6,010 incidents) to 9.37% (2,810 incidents) in 1996. The extent of disability – from fatal to temporary disability –during the five-year period also attests to the decline in fatalities in work-related accidents, which may imply the use of more effective safety protocols in the workplace.

The most common complaint, accounting for 26.62% of all occupational diseases in 2007 and 36.61% in 2009, was work-related musculoskeletal diseases (MSDs). These are “diseases of the muscles and their associated ligaments and their connective tissue and of the bones and cartilage viewed collectively”, which may be the result of slips and falls or repetitive movements, cause severe discomfort and pain among workers troubled with lower back pain, carpal tunnel syndrome, bursitis and degenerative disc diseases, among others.

In addition, the increasing demand of consumers for 24/7 service raises the likelihood of long-term health and stress consequences on the physical and psychological well-being of affected workers (i.e., hypertension, depression, etc.) in the wholesale and retail industry. The safety and security of workers, especially establishments that remain open late in the evening (i.e., convenience stores cashiers) are also work-related hazards that have to be continually addressed.

Table 4: Wholesale and Retail Trade Industry Occupational Diseases in Establishments Employing 20 and Over, 2007 and 2009

	2007	2009
Work-Related Musculoskeletal Diseases	1,156	1,300
Bronchial Asthma	1,317	409
Peptic Ulcer	663	216
Essential Hypertension	157	515
Infections	672	42
Cardiovascular Diseases	20	53
Occupational Dermatitis	213	37
Heat Stroke, Cramps, Exhaustion	88	39

Cataract	5	8
Deafness	11	-
Acute Poisoning	13	-
Chilblain, Frostbite, Freezing	25	-
Others	-	681
Total Cases	4,342	3,551

source: 2009-10 BLES Integrated Survey

B. Earnings

i. Average Revenue per Sub-sector

According to the NSO database, the average daily pay in the wholesale and retail industry grew by an average of 4.84% per year from 2006's PhP 227.34 per day to 2010's PhP 274.54 per day (refer to Table 5). The WRT's average daily pay was consistently below that of the compensation received by employees in all industries - for instance, the average daily pay for all industries was 10.44% more than that of the WRT's in 2010 - and the manufacturing sector - for example, 13.13% higher than that of the WRT's in 2010 - during the five-year period.

Table 5: Average Daily Pay (in Philippine Pesos), 2006-2010

Major Industry Group/Sector	2006	2007	2008	2009	2010	Average Growth (in %)
All Industries	261.90	266.65	278.93	290.73	306.53	4.02
Agriculture, Hunting and Forestry, & Fishing	130.22	130.56	136.73	142.87	150.66	3.73
Manufacturing	264.99	277.19	289.56	299.93	310.57	4.05
Wholesale and Retail, Repair of Motor Vehicles, Motorcycles and Personal and Household Goods	227.34	242.49	249.92	257.71	274.54	4.84

source: NSO

Table 6: Sale, Maintenance, and Repair of Motor Vehicles and Motorcycles, Retail Sale of Automotive Fuel Sub-sector Average Monthly Wage Rates of-Time Rate Workers on Full-time Basis, 2008 and 2010

Occupation	July 2008 (in PHP/month)	August 2010 (in PhP/month)	Ave. (in PhP/month)	Growth Rate (in%)
Sales Supervisors	14,273	15,435	14,854.00	8.14
Accountants and Auditors	16,734	13,085	14,909.50	-21.81
Technical and Commercial Sales Representatives	11,463	11,771	11,617.00	2.69
Accounting and Bookkeeping Clerks	10,048	12,522	11,285.00	24.62
Stock Clerks	10,132	8,969	9,550.50	-11.48
Cashiers	10,925	10,082	10,503.50	-7.72
Shop Salespersons and Demonstrators	10,124	10,466	10,295.00	3.38
Motor Vehicle Mechanics and Related Trades Workers	9,736	9,815	9,775.50	0.08
Unskilled Workers Except Janitors, Messengers and Freight Handlers	8,907	9,131	9,019.00	2.51

source: BLES, 2009/2010 Occupational Wages Survey

ii. Average Salary per Occupation

As seen in table 6, the 2008 and 2010 average monthly wage rates in the Sale, Maintenance and Repair of Motor Vehicles and Motorcycles, Retail Sale of Automotive Fuel sub-sector varied between growths of 1% to 25% and declines of 22% to 8%. Among the compensations that rose significantly were for accounting and bookkeeping clerks, which according to 2009/2010 BLES Survey had 73 applicants for every 10 vacancies and, in general, took an average of two months to fill each vacancy.

Sales supervisors, which had the second highest average monthly wage growth rate in the sub-sector, reported 66 applicants per 10 vacancies and a two-month median duration to fill-up each vacancy. Stock clerks and cashiers, occupations wherein average compensation declined in 2010, on the other hand, had one-month lag times in filling up vacancies according to the BLES Occupational Shortages and Surplus Survey.

Table 7: Wholesale Trade and Commission Trade, Except of Motor Vehicles and Motorcycles Sub-sector Average Monthly Wage Rates of-Time Rate Workers on Full-time Basis, 2008 and 2010

Occupation	July 2008(in PHP/month)	August 2010(in PHP/month)	Ave. (in PHP/month)	Growth Rate (in%)
Sales Supervisors	20,287	23,115	21,701.00	13.94
Accountants and Auditors	20,512	29,917	25,214.50	45.85
Technical and Commercial Sales Representatives	15,737	16,622	16,179.50	5.62
Accounting and Bookkeeping Clerks	10,798	12,106	11,452.00	12.11
Stock Clerks	9,877	11,673	10,775.00	18.18
Cashiers	10,785	12,205	11,495.00	13.17
Telemarketers	10,923	17,079	14,001.00	56.36
Shop Salespersons and Demonstrators	9,356	9,814	9,585.00	4.90
Unskilled Workers Except Janitors, Messengers and Freight Handlers	8,376	9,084	8,730.00	8.45

source: BLES, 2009/2010 Occupational Wages Survey

Table 8: Retail Trade, Except of Motor Vehicles and Motorcycles Repair of Personal and Household Goods Sub-sector Average Monthly Wage Rates of-Time Rate Workers on Full-time Basis, 2008 and 2010

Occupation	July 2008(in PHP/month)	August 2010(in PHP/month)	Ave. (in PHP/month)	Growth Rate (in%)
Sales Supervisors	13,595	14,835	14,215.00	9.12
Accountants and Auditors	16,156	15,551	15,853.50	-3.74
Accounting and Bookkeeping Clerks	9,258	9,979	9,618.50	7.79
Stock Clerks	8,957	9,715	9,336.00	8.46
Cashiers	9,092	9,645	9,368.50	6.08
Telemarketers	10,370	11,305	10,837.50	9.02
Shop Salespersons and Demonstrators	8,275	8,738	8,506.50	5.60
Unskilled Workers Except Janitors, Messengers and Freight Handlers	7,313	7,886	7,599.50	7.84

source: BLES, 2009/2010 Occupational Wages Survey

As seen in table 7, all occupations in the Wholesale Trade and Commission Trade, Except of Motor Vehicles and Motorcycles sub-sector posted increases in their respective 2010 average monthly wage rates of 5% to 56% relative to the 2008 levels. The 2009/10 BLES Occupational Shortages and Surplus Survey most these positions had a median duration filling-up time of one month for stock clerks and cashiers, 2 months for accountants and auditors, sales supervisors, and technical and commercial sales representatives, and six months for telemarketers.

Lastly, all the average monthly wages in the Retail Trade, Except of Motor Vehicles and Motorcycles Repair of Personal and Household Goods sub-sector, except for that of accountants and auditors, went up in 2010 from the 2008 levels (refer to Table8). Growth rates ranged from a low of 5.6% to a high of 9%. Additional information from the BLES confirms that it took an average of two to six months to hire individuals for the occupations listed above and that, in general, applicants for these positions were as many as 1,060 (telemarketers) for every ten vacancies.

C. Training and Advancement

Wholesalers and retailers offer in-house training for certain occupations. Stock clerk candidates, for example, “can be trained on the job in one to three months, beginning with basic tasks such as unpacking and counting merchandise and advancing to taking inventory and keeping records”. Sales representatives may also receive formal training – that may include job rotation from “production to installation, and distribution of the product” from the companies for which they work to ensure their familiarity with the products/brands that they would be tasked to sell. Continuous trainings and participation in seminars and trade fairs guarantee that sales representatives would be knowledgeable in the existence of new products and how they can be used to address the needs of their clients.

The most recent development in the training programs in WRT is the implementation of the National Technical Education and Skills

Development Plan (NTESDP) first implemented in 1999, and repeated in 2005 meet TESDA's development objectives of providing decent and productive employment, matching supply and demand, and providing quality TVET. In line with this, they implemented several training regulations to ensure the quality of Filipino workers. They introduced the Philippine National Qualifications Framework to establish a coherent national and internationally benchmarked structure for all qualifications in the Philippines. It covers all levels of formal education from a high school diploma to certificates for initial entry to the workplace, up to advanced diplomas for technical and vocational education (Syjuco, n.d.). The TESDA also developed training regulations which consists of competency standards, training standards, and assessment and certification arrangements which serve as the bases for the development of the curriculum and instructional materials for TESDA's competency-based technical education and skills development. Annex 4 lists TESDA courses offered specifically for potential wholesale and retail industry workers.

Although the scope of the WRT industry varies from department stores to *sari-sari* stores, including the repair of motor vehicles, personal and household goods, the competency central to the industry is that of providing *customer service*, although the repair of motor vehicles deviates up to some extent.

According to TESDA's (2012) training regulations, a fixed set of Basic Competencies is required for all occupations. These basic competencies include participating in workplace communication, working in a team environment, practicing career professionalism and practicing occupational health and safety procedures. TESDA then requires common and core competencies, as well as electives that are specific to each field. In customer service, common competencies include developing and being updated in their knowledge about the industry, performing computer operations, and performing workplace security and safety practices. Core competencies include preparing and selling products for display, being able to interact with customers and to respond to customer complaints, being able to balance the register/terminal in a retail environment (counting money, calculating non-cash transactions and reconciling takings), and performing stock control procedures (inventory checks, receiving and processing incoming goods, reordering). More advanced competencies of customer service is

comprised of the preparation, arrangement and presentation of food product displays, labelling or pricing of stock, handling, protection and storage of food products on sale, as well as performing merchandise presentation. Upon achieving all the necessary qualifications and competencies enumerated above, the individual is competent to be a sales clerk/sales assistant, product specialist, promo merchandiser, customer service clerk/assistant, service crew, cashier, counter-checker/bagger, and a junior visual merchandiser (TESDA, 2012).

In automotive servicing in general, the basic competencies are the same with that of customer service. Common competencies including applying sealants/adhesives, moving and positioning vehicles, performing mensuration and calculation of repairs, being able to read, interpret and apply specifications and manuals, use and apply lubricant/coolant, and performing general shop maintenance. The core competencies include performing tune ups on diesel and gasoline engines, servicing automotive batteries, ignition systems, starting systems, charging systems, engine mechanical systems, clutch systems, differential and front axles, steering systems, brake systems, and suspension systems, as well as testing and repairing wiring/lighting systems, performing under chassis preventive maintenance and overhauling manual transmission (TESDA, 2012). Upon achieving all necessary competencies, the individual will be ready to become an automotive service technician.

D. Specific Occupations

The specifics of the occupations in the wholesale and retail industry (i.e., educational requirement, professional licensure requirement, job descriptions, average earnings, etc.) are as follows:

1. Branch/Operations Manager

Basic Educational/Training/Skill Requirements	✓ Bachelor's/College degree
	In general, the branch/operations manager oversees and coordinates all aspects of store operations, including but not limited to, logistics and requirements. He/she is responsible for the overall profitability and growth of the store. He/she also

<p>Job Description</p>	<p>sets store policies and standards and tracks the store's performance in relation to the achievement of these standards.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ maintaining customer and employee contact on the work area to ensure that quality service is being applied; ✓ conducting performance evaluation of his or her team associates and encourages them to do better in the office; ✓ giving merit to an employee who has done a big contribution in sales and operation in order for and actively participate in it; ✓ handling the cases of some customer complaints which have been escalated from the supervisors; ✓ conducting daily sales and operations assessments and monitors every transaction made in the business; ✓ ensuring the growth of the business branch and is committed to its success; ✓ representing the company in cases of any meetings held in the local society; ✓ ensuring the sanitation and [promoting] cleanliness in the vicinity of the office; ✓ making sure that the employees' salary and bonuses are properly given; ✓ informing all employees about non-working holidays, working holidays, special non-working holidays and other events which may affect the daily operation of the business; ✓ making sure that the price of the product or services offered by the branch business is correct; ✓ sending some reports to the main branch and gives them updates of the business status; ✓ determining and [developing] the annual budget for the daily expenses of the business branch; and ✓ performing some tasks related to business management whenever required" (http://www.samplejobdescriptions.org/branch-manager-job-description.html).
	<p>In 2011, monthly earnings varied depending on the size/performance of the store.</p>

Earnings	<ul style="list-style-type: none"> ✓ Min: PhP15,400 Max:PhP27,000 Ave: PhP18,000 (http://myjobstreet.jobstreet.com/career-enhancer/basic-salary-report.php?param=Branch%20Manager 170 p h) ✓ Min: PhP25,000 Max: PhP100,000 Ave: PhP45,000
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2. Account Manager

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor's/College degree in Commerce ✓ An MBA is an advantage
Job Description	<p>In general, an account manager is “responsible for prospecting and expanding the customer base by understanding what the customer wants and by submitting offers. He negotiates and closes deals and has to submit reports along with his business strategies”.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ identifying accounts where revenues may be shrinking and formulates strategies to reach out to these accounts and retain the customers; ✓ being actively involved in developing relationships with key users; ✓ supervising a product marketing team to get customer feedback on product improvements; ✓ coordinating with the sales team and marketing to find out ways to retain and increase customers; ✓ meeting customer needs; ✓ conducting strategic account reviews regularly to review service needs and user trends; ✓ making business objectives by identifying products and pricing that meet customer needs; ✓ conducting rate reviews or any dispute related to billing with strategic customers upon request; ✓ gathering market information to create offers that will boost the company margins and will beat his competitors; ✓ identifying business trends, forecast demand and prepare the annual sales budget; and ✓ monitoring performances keeping the budget in mind and suggests measures to maintain

	profits”.
Earnings	In 2011, the minimum monthly compensation was Php20,000, maximum of Php38,000 and an average of Php30,000.

3. Marketing Manager

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree
Job Description	<p>In general, a marketing manager “determines the demand for products and services offered by a firm and its competitors and identify potential customers. Develop pricing strategies with the goal of maximizing the firm’s profits or share of the market while ensuring the firm’s customers are satisfied. Oversee product development or monitor trends that indicate the need for new products and services”</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “developing pricing strategies, balancing firm objectives and customer satisfaction; ✓ identifying, [developing], and [evaluating] marketing strategy, based on knowledge of establishment objectives, market characteristics, and cost and markup factors; ✓ evaluating the financial aspects of product development, such as budgets, expenditures, research and development appropriations, and return-on-investment and profit-loss projections; ✓ formulating, [directing] and [coordinating] marketing activities and policies to promote products and services, working with advertising and promotion managers; ✓ directing the hiring, training, and performance evaluations of marketing and sales staff and oversee their daily activities; ✓ negotiating contracts with vendors and distributors to manage product distribution, establishing distribution networks and developing distribution strategies; ✓ consulting with product development personnel on product specifications such as design, color, and packaging; ✓ compiling lists describing product or service offerings;

	<ul style="list-style-type: none"> ✓ using sales forecasting and strategic planning to ensure the sale and profitability of products, lines, or services, analyzing business developments and monitoring market trends; ✓ selecting products and accessories to be displayed at trade or special production shows; ✓ conferring with legal staff to resolve problems, such as copyright infringement and royalty sharing with outside producers and distributors; ✓ coordinating and participating in promotional activities and trade shows, working with developers, advertisers, and production managers, to market products and services; ✓ advising business and other groups on local, national, and international factors affecting the buying and selling of products and services; ✓ initiating market research studies and analyze their findings; ✓ consulting with buying personnel to gain advice regarding the types of products or services expected to be in demand; and ✓ conducting economic and commercial surveys to identify potential markets for products and services”.
Earnings	In 2011, monthly salary ranged from a minimum of PhP25,000 to a maximum of PhP40,000, and an average of PhP30,000.

4. Supply Chain Manager

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree
Job Description	<p>In general, supply chain managers “are required to organize and plan the transferring process of materials and goods from suppliers and manufacturers to customers. They manage the distribution operations in major retail companies and other organizations. These managers may work with other professionals, such as logistics contractors, warehouse staff, purchasing officers, and transport clerks to ensure that materials are stored correctly and dispatched to customers on time”.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “making sure targets are met;

	<ul style="list-style-type: none"> ✓ overseeing shipment arrivals; ✓ tracking material's movement; ✓ planning timetables for delivery; and ✓ monitoring stock levels.
Earnings	In 2012, the monthly salary of supply chain ranged from PhP74,000 to PhP146,103.

5. Brand Manager

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor's/College degree, preferably in business or marketing ✓ Applicants with work experience have advantage)
Job Description	<p>In general, “brand managers are concerned with creating a lasting impression among customers and improving product sales and market share. This is achieved by making sure that their organization’s advertising and marketing activities send out the right image. Key aspects of the job include creating brand guidelines and making sure that employees follow them”</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “researching consumer markets, monitoring market trends and identifying potential areas in which to invest, based upon consumer needs and spending habits; ✓ looking at the pricing of products and analyzing the potential profitability; ✓ generating names for new and existing products and services, coming up with ideas for new packaging designs, including shapes, size, colors, fonts and imagery; ✓ overseeing the production of TV adverts, newspaper and magazine advertisements, direct mail packs, email campaigns, websites, exhibition stands, road shows and liaising with art designers, copywriters, media buyers and printers; ✓ checking marketing copy; ✓ supervising the sign off of marketing literature and campaigns, liaising with legal and compliance personnel, ensuring the designs and messages meet the company brand and regulatory guidelines; ✓ monitoring product distribution and consumer reactions through focus groups and market research; and

	<ul style="list-style-type: none"> ✓ coordinating the launch programme to external customers as well as employees”.
Earnings	<p>In 2012, monthly earnings of managers in general varied depending on the size/performance of the company and specific designation.</p> <ul style="list-style-type: none"> ✓ For CEO/SVP/AVP/VP/Director, Min: PhP55,000 Max:PhP120,000 Ave.: PhP85,000; ✓ For Assistant Manager/Manager, Min: PhP20,000 Max: PhP40,000 Ave.:PhP30,000

6. Human Resources Officer

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree
Job Description	<p>In general, “a human resources officer must have a clear understanding of their employer’s business objectives and be able to devise and implement policies which select, develop and retain the right staff needed to meet these objectives.”</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “working closely with departments, increasingly in a consultancy role, assisting line managers to understand and implement policies and procedures; ✓ promoting equality and diversity as part of the culture of the organization; ✓ liaising with a wide range of people involved in policy areas such as staff performance, and health and safety; ✓ recruiting staff – this involves developing job descriptions and person specifications, preparing advertisements, checking application forms, short listing, interviewing and selecting candidates; ✓ developing and implementing policies on issues such as working conditions, performance management, equal opportunities, disciplinary procedures and absence management; ✓ advising on pay and other remuneration issues, including promotion and benefits; ✓ undertaking regular salary reviews; ✓ negotiating with staff and their representatives (for example, trade union officials) on issues relating to pay and conditions;

	<ul style="list-style-type: none"> ✓ administering payroll and maintaining employee records; ✓ interpreting and advising on employment legislation; ✓ dealing with grievances and implementing disciplinary procedures; ✓ developing HR planning strategies with line managers, which consider immediate and long-term staff requirements in terms of numbers and skill levels; ✓ planning, and sometimes, delivering, training, including inductions for new staff; and ✓ analyzing training needs in conjunction with departmental managers”.
Earnings	<p>In 2012, human resource officer monthly compensation varied according to designation and work experience:</p> <ul style="list-style-type: none"> ✓ For Assistant Manager/Manager, Min: PhP17,000 Max: PhP40,000 Ave.: PhP25,000; ✓ For Supervisor with five or more years of experience, Min: PhP15,000 Max: PhP19,000 Ave.: PhP21,000; and ✓ For HR Officer with 1-4 years of experience, Min: PhP12,000 Max: PhP18,000 Ave.: PhP15,000

7. Display Designer

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree ✓ Apprenticeships and work experience in design or retail are preferred
Job Description	<p>In general, display designers “promote their client’s products, brand and image by creating eye-catching display using visual and graphic elements. Depending on their client’s business, the display may be taken to a wide range of locations, from trade exhibitions to shopping malls”.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “making presentations to potential clients to win contracts; ✓ discussing the brief with the client and identifying the key messages they wish to convey; ✓ gaining an in-depth understanding of the

	<p>client’s organization, products, image and target market;</p> <ul style="list-style-type: none"> ✓ considering factors such as the space available for the display, any special features it should incorporate (such as chairs, models and computers) and the client’s budget; ✓ coming up with design ideas, images and graphics incorporating the client’s logo and corporate colors, and discussing these with the client; ✓ researching cost and working within a budget; ✓ revising designs according to feedback from clients and members of the design team; and ✓ overseeing the production of the chosen design, checking the quality and making sure the project is completed to schedule
Earnings	<p>Information on display designer salaries are not readily available but as “to some extent the role of visual merchandiser and display designers may overlap” the 2012 merchandiser monthly compensation may give estimates of what one may expect to receive in this occupation: merchandiser remuneration ranges from PhP10,000 to PhP20,000.</p>

8. Visual Merchandiser

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree ✓ Apprenticeships and work experience in design or retail are preferred
Job Description	<p>In general, visual merchandisers “create imaginative eye-catching displays in retail stores. They aim to attract the attention of customers and encourage them to buy”.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “researching lifestyle and design trends and making sure the designs would appeal to the target audience; ✓ working with other members of the design, marketing and buying team to develop themes and color schemes for display, for example Christmas, Valentine’s day, sales and special promotions; ✓ sketching designs and developing floor plans, making the most of the space available; ✓ taking direction from head office on corporate

	<p>schemes when appropriate;</p> <ul style="list-style-type: none"> ✓ sourcing materials such as props and lighting; ✓ installing and dismantling displays; ✓ preparing visual merchandising packs, including plans and photographs, for other stores in the chain, to make sure all displays present a consistent image; and ✓ visiting branches to train and brief staff on arranging displays .
Earnings	In 2012 merchandisers received monthly compensation that ranged from PhP10,000 to PhP20,000.

9. Sales Supervisor

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ As work experience is the main source of knowledge and skills necessary for the position, some sales supervisor may have no formal education secondary education(http://www.careeroverview.com/sales-manager-careers.html). ✓ Most have bachelor’s degrees in business, management, social sciences, or other liberal arts courses
Job Description	<p>In general, “sales supervisors are often responsible for the management of cashiers, customer representatives, retail salesperson[s], order fillers, stock clerks, wholesale and manufacturing sales representatives, and sales engineers. They may also undertake the task of interviewing, hiring and training new employees. Most sales supervisors are also in charge of preparing work schedules and assigning workers to specific jobs. Supervisors may hold job titles such as department manager, or sales manager”</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “managing day-to-day administration of individual departments; ✓ establishing and implementing policies, objectives, goals, and procedures for their particular departments; ✓ organizing activities with other department heads, and continually strive for easy and efficient operations within their departments; ✓ supervising employees, clean and organize various shelves and displays, attend to inventory work in stockrooms, inspect various

	<p>merchandise to ensure that nothing is damaged or outdated;</p> <ul style="list-style-type: none"> ✓ coordinating sales promotions, review inventory and sales records, and develop merchandising techniques; ✓ responsible for preparing budgets, assigning sales territories, devising sales-incentive programs, approving sales contracts, or making other decisions that specifically affect personnel; ✓ guaranteeing satisfactory service and quality goods to their customers; ✓ dealing with complaints, answer questions, and occasionally see to budgeting, accounting, and purchasing issues; and ✓ responsible to promote sales procedures and public relations by greeting and assisting customers” <p>(http://www.careeroverview.com/sales-manager-careers.html).</p>
Earnings	In 2012, supervisors with five or more years of experience earned a minimum of PhP15,000 per month to as much as PhP25,000 per month.

10. Account Executive/Account Officer

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College Degree
Job Description	<p>In general, account executives “are primarily responsible for growing the business of the company by maintaining relations with current clients and establishing new business”.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ delivering presentations to purchasing decision makers of a company; ✓ negotiating contract terms with clients and successfully closes sales; ✓ working towards reaching a particular target; ✓ developing and maintaining close relations with local business community to meet the client’s needs; ✓ promoting products and services at conventions, trade fairs, etc.; ✓ maintaining relations with public relations and media persons for any product launch;

	<ul style="list-style-type: none"> ✓ assisting in coordination and implementation of telemarketing activities; ✓ meeting potential clients and explains the merits of his company’s products and services; and ✓ collaborating with marketing departments to think sales strategies”(http://www.samplejobdescriptions.org/ac count-executive-job-description.html).
Earnings	In 2011, the monthly salary of an Account Executive was a minimum of PhP10,000,maximum of PhP35,000 and with an average of PhP25,000.

11. Customer Service Assistant

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree
Job Description	<p>In general, customer service assistants are “responsible for answering queries of customers either via email, phone, or face to face. Their major responsibility is to keep current or up-to-date information regarding all products, procedures, and services of the organization”</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “accepting order inquiries from customers or clients and responding with follow up queries; ✓ responding to routine customer inquiries regarding products and services of the organization; ✓ handling and resolving customer complaints, obtaining and evaluating all relevant data to handle complaints and inquiries; ✓ following up with customers to ensure high-level satisfaction and determining future requirements; ✓ collecting data and gathering routine reports and documents for management, accounting department, and external partners; ✓ handling shipments of catalogues, marketing materials, and samples to potential customers as necessary; ✓ facilitating the collected competitive information

	<p>to monitor business opportunities and trends;</p> <ul style="list-style-type: none"> ✓ preparing, generating and distributing order acknowledgements and daily reports to appropriate personnel; ✓ compiling sales data and gathering information about potential distributors and competitors; and ✓ maintaining database of customer contacts”.
Earnings	In 2011, the monthly salary was a minimum of PhP8,000, maximum of PhP25,000 andwith an average of PhP11,000.

12.Cashier

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree
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<p>Job Description</p>	<p>In general, cashiers “receive and disburse money in establishments other than financial institutions. Their work usually involves use of electronic scanners, cash registers, or related equipment, which are needed in processing credit or debit card transactions and validating checks”.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ Receiving payment by cash, check, credit cards, vouchers, or automatic debits; ✓ Issuing receipts, refunds, credits, or change due to customers; ✓ counting money in cash drawers at the beginning of shifts to ensure that amounts are correct and that there is adequate change; ✓ greeting customers entering establishments; ✓ maintaining clean and orderly checkout areas; ✓ establishing or identifying prices of goods, services or admissions, and tabulate bills using calculators, cash registers, or optical price scanners; ✓ redeeming coupons and gift certificates; ✓ resolving customer complaints; ✓ answering customers’ questions, and provide information on procedures or policies; ✓ cashing checks for customers; ✓ calculating total payments received during a time period, and reconcile this with total sales; ✓ computing and record totals of transactions; ✓ selling tickets and other items to customers; ✓ keeping periodic balance sheets of amounts and number of transactions; ✓ bagging, boxing, wrapping, or [gift-wrapping] merchandise and [preparing] packages for shipment; ✓ sorting, counting, and wrapping currency and coins; ✓ processing merchandise returns and exchanges; ✓ paying company bills by cash, vouchers, or checks; ✓ requesting information or assisting using paging systems; ✓ stocking shelves, and marking prices on shelves and items; ✓ compiling and maintaining non-monetary reports and records;
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	<ul style="list-style-type: none"> ✓ monitoring checkout stations to ensure that they have adequate cash available and that they are staffed appropriately; ✓ posting charges against guests' or patients' accounts; and; ✓ offering customers carry-out service at the completion of transactions).
Earnings	In 2011, the monthly compensation varied at a minimum of PhP8,000, maximum of PhP19,000, and an average of PhP15,000.

13.Sales Lady/Sales Associate

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ At least a vocational diploma/short course certificate on any field ✓ 4-yr college degree graduates preferred
Job Description	<p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ working with customers with the most cheerful and pleasant disposition; ✓ giving answers to customers' questions or concerns related to the product they are charged to sell and demonstrate good knowledge of the product; ✓ communicating and assisting customers in any way possible and as the customers may require; ✓ dealing with customer's complaints professionally and with restraint; closing as many deals and transactions as possible; ✓ processing or helping process payments made by the customer – whether by in cash or credit card; ✓ bagging products for the customers (if there's no other assigned to that); ✓ reporting sales accurately; ✓ May travel at times to sell and make representations of the products to clients' homes; and ✓ (May) call regular patrons on the phone or other people at retail outlets or storage rooms” (http://www.jobresponsibilities.org/sales-lady.html).
Earnings	<ul style="list-style-type: none"> ✓ In 2012, associates with less than one year experience earned a minimum salary of PhP8,000 per month, average salary of PhP10,000 per month, or a maximum salary of PhP12,000 per month (http://myjobstreet.jobstreet.com.ph/career-

	<p>enhancer/basic-salary-report.php?param=Sales%20Associate 170 ph).</p> <ul style="list-style-type: none"> ✓ In 2012, sales associates with one to four years of experience can earn a minimum salary of PhP10,000 per month, average salary of PhP12,000 per month, or a maximum of PhP16,500 per month In 2012, sales associates with more than five years of experience – supervisory level/position - can earn a minimum salary of PhP16,000 per month, average salary of PhP20,000 per month, or a maximum of PhP25,000 per month.
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14. Sales Representative

<p>Basic Educational/Training / Skill Requirements</p>	<ul style="list-style-type: none"> ✓ Preference is for applicants with bachelor’s degrees but previous sales experience may be considered in lieu of formal education
<p>Job Description</p>	<p>In general, the primary duties of sales representatives “are to interest wholesale and retail buyers and purchasing agents in their merchandise and to address clients’ questions and concerns” (http://www.groper.com.au/job-description.php?jobID=36).Error! Hyperlink reference not valid. Sales representatives spend much of their time traveling to and visiting with prospective buyers and current clients.</p> <p>During a sales call, they:</p> <ul style="list-style-type: none"> discuss the client’s needs and suggest how their merchandise or services can meet those needs; ✓ show samples or catalogs that describe items their company stocks and inform customers about prices availability, and ways in which their products can save money and boost productivity; ✓ demonstrate their products and advise clients on how using these products can reduce costs and increase sales; ✓ emphasize the unique qualities of their products and services; ✓ may help install new equipment and train employees in its use; ✓ take orders and resolve any problems with or complaints about the merchandise; ✓ analyze sales statistics, prepare reports, and handle administrative duties such as filing

	<p>expense accounts reports, scheduling appointments, and making travel plans; and read about new and existing products and monitor the sales, prices, and products of their competitors”.</p> <p>“Obtaining new accounts is an important part of the job. Sales representatives follow leads from other clients, track advertisements in trade journals, participate in trade shows and conferences, and may visit potential clients unannounced. In addition, they may spend time meeting with and entertaining prospective clients during evenings and weekends”.</p>
Earnings	<ul style="list-style-type: none"> ✓ In 2012, sales representatives with less than one year experience can earn a minimum salary of PhP9,500 per month, average salary of PhP12,000 per month, or a maximum salary of PhP13,500 per month. In 2012, sales representatives with one to four years of experience can earn a minimum salary of PhP10,540 per month, average salary of PhP14,600 per month, or a maximum of PhP17,500 per month. ✓ In 2012, sales representatives with more than five years of experience can earn a minimum salary of PhP15,000 per month, average salary of PhP18,000 per month, or a maximum of PhP24,000 per month.
Technology	<p>Sales representatives use laptop computers, telecommunications device and other equipment/device that can be used to make convincing and attractive sales presentations.</p>

15. Warehouse Supervisor

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College degree
Job Description	<p>In general, warehouse supervisors “manage and oversee the functions of the storehouse and ensure the smooth operations of all activities. They also handle and manage warehouse workers and adhere to necessary safety and legal procedures of working”</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “supervising the functions and working of all warehouse workers; ✓ delegating and assigning tasks and evaluating the working of staff;

	<ul style="list-style-type: none"> ✓ adhering to the compliance of all legal and safety procedure of working; ✓ managing inventory monitoring cycle counts and conducting audits of same to validate results; ✓ supervising proper shift allocations and ensuring efficiency of all warehouse staff; ✓ organizing and conducting necessary training activities for the staff and workers; and ✓ ensuring proper functioning of all warehouse tools and equipment”.
Earnings	In 2011, the monthly compensation of a Warehouse Supervisor was a minimum of PhP 9500, maximum of PhP20,000 and average of PhP20,000.

16. Merchandiser

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ Bachelor’s/College Degree
Job Description	<p>In general, merchandisers are responsible for “the distribution of products to their designated stores. Part of their jobs is to ensure that the products delivered has the right quantity, payments, and delivered in the right place”</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ communicating with retailers and buyers regarding the product, i.e., prices, quantity, warranty, etc.; ✓ ensuring that the products are sent to its designated stores; ✓ checking the products before the delivering to its designated stores; ✓ planning and giving price tags on each product depending on the quantity, sales, deals and demand; ✓ making time to time check on the stock product; ✓ ensuring the quality of the product, its status, appearance before sending to clients; ✓ checking and analyzing the sales of the product; ✓ making deals with buyers and prospects buyers; ✓ keeping important documents regarding the products such as receipts, order slips, etc. ✓ giving orders to the delivery crew; and ✓ managing and training new staff”
Earnings	In 2011, the monthly salary varied at a minimum of PhP7,500, maximum of PhP23,000 and average of

	PhP10,500.
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17. Telemarketer

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ Vocational Diploma ✓ Short Course Certificate ✓ Bachelor's/ College Degree
Job Description	<p>In general, telemarketers “are sales and marketing representatives who do business strictly by telephone and complement with company email and fax”.</p> <p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ generating the list of potential clients; ✓ calling people from the list of potential clients for the purpose of making a sale; ✓ gathering information that will help identify potential customers worth following up on via email/fax and schedules appointments for the meeting with outdoor field sales representative or pre-sales consultant; ✓ conducting market surveys and creates database (includes names, addresses, phone numbers, reactions to products, etc.) of prospective customers; ✓ making follow-up calls for the purpose of attempting more sales or as courtesy calls “to thank customers for their business”; ✓ negotiating and [closing] sales that can be done over the telephone; and ✓ closing orders placed with field representatives.
Earnings	In 2011, the monthly salary was a minimum of PhP8,000 to a maximum of PhP11,500.

18. Stock Clerk

Basic Educational/Training / Skill Requirements	<ul style="list-style-type: none"> ✓ High school degree or GED ✓ Skills required are basic reading, writing, and mathematical skills
	<p>In general, “stock clerks work in stores, warehouses, and factories, where they control the flow of supplies in and out of stockrooms. They receive and store merchandise or equipment that is retained for future use and issue these items from the stockroom when they are needed. In addition, they keep track of the number of items in storage and reorder items that are in short supply”.</p>

Job Description	<p>Specific work activities include:</p> <ul style="list-style-type: none"> ✓ “recoding the incoming and outgoing materials, which includes goods damaged in transit; ✓ “recoding the shipment details and invoice management; ✓ coordinating with other individuals, such as cargo agents and shipping clerks; ✓ manually loading and unloading materials; ✓ cleaning and maintaining the warehouse; ✓ ensuring the proper stocking of the inventories; ✓ organizing and marking the stocks to easily access the goods when required; and ✓ stocking the sales floor and the shelves are required.
Earnings	<ul style="list-style-type: none"> ✓ In 2012, stock clerks with less than one year experience can earn a minimum salary of PhP8,000 per month, average salary of PhP9,200 per month, or a maximum salary of PhP10,000 per month. ✓ In 2012, stock clerks with one to four years of experience can earn a minimum salary of PHP8,000 per month, average salary of PhP10,000 per month, or a maximum of PhP12,000 per month
Technology	<ul style="list-style-type: none"> ✓ Automated and computerized equipment in stocking and tracking inventory

19. Automotive Technician

Basic Educational/Training/Skill Requirements	<ul style="list-style-type: none"> ✓ Three-year post secondary non-degree course in Automotive Technology
Job Description	<p>Automotive technicians are employed in automotive service firms, automotive parts manufacturing industries, farm machineries and heavy equipment service companies. In general, automotive technicians are involved in “assembly, operation, performance testing, trouble shooting, repair and maintenance operation, and use of all kinds of automotive equipment and machine tools including quality control. They can either be auto diesel mechanic[s], automotive electrician[s], power train[s] and under chassis mechanics[s] or auto body repairmen.</p> <p>Specific work activities include:</p>

	<ul style="list-style-type: none"> ✓ “inspecting, maintaining, and repairing automobiles and light trucks that run on gasoline, diesel, electricity, or alternative fuels such as ethanol; ✓ testing and lubricating engines and other major components; ✓ repairing or replacing worn out parts before they cause breakdowns or damage the vehicle; and ✓ examining every critical part such as belts, plugs, brake and fuel system and other potentially troublesome items that should be watched closely”
Earnings	In 2011, entry level salary for automotive technician ranged from PhP8,000 to PhP17,500 per month.
Technology	<ul style="list-style-type: none"> ✓ Use, among other traditional tools of the trade, electronic diagnostic equipment, digital manuals and reference materials; and ✓ Rapidly changing technology in the sub-sector require that automotive technicians be able to keep up with new methods, procedures, specifications of repairing vehicles through reading and continuous training.
Entrepreneurial Mindset	<ul style="list-style-type: none"> ✓ Automotive technicians may establish their own automotive repair shops, thereby increasing their earnings potential.

The occupations listed above are normally required in large retail enterprises. It is not uncommon for micro and small-scale retail businesses to be manned by no more than two or three workers (i.e., family members in the case of sari-sari stores) who perform all the described above – from procuring inventory, selling and marketing the firms.

D. Career Path/Advancement

In general, establishments belonging to the wholesale and retail sector strive to adapt to evolving consumer spending behavior, rapidly changing technology and shifting and innovative business processes (National Institute for Occupational Safety and Health, 2010). Technology, in particular, has a significant impact on productivity, quality of work, and healthy and safety workplace. Promotions, therefore, are products of work experience, participation in

training workshops and seminars, and formal education, especially in the case of managerial and/or supervisory positions.

While promising high school graduates can be hired in the high-end, non-food retail sub-sector as front liners or sales associates, they would need further education if they are going to be promoted to a branch manager. The Validation Workshop participants asserted that most companies would prefer to promote from within but without the proper educational background - and the higher levels of competence it represents, these retailers would have to look for branch managers from outside their enterprises (Validation Workshop, 2012).

Further, the representatives of the high-end, no-food retail subsector asserted that the highly competitive nature of the retail subsector –increasing number of local and foreign competitors and growing market that includes catering to international demand - stressed the need for a college course that focuses on the retail subsector (i.e., bachelor degree in retail management). The participants believed that tertiary level education can shorten the learning curve (Validation Workshop, 2012).

Lastly, a food retailer representative in the Validation Workshop emphasized that while general education would suffice, individuals with integrity and who are hardworking are highly valued in the sub-sector.

Chapter 4

Job Outlook and Prospects

A. Growth Potentials

1. Dynamism of the Industry

According to the BSP, general business optimism improved for the first two quarters of 2012 as evidenced by the rise in the overall confidence index for the fourth consecutive quarter to 44.5% relative to 40.5% in the first quarter of 2012. Businesses claim that the continued optimism “due to an increase in orders and new contracts/projects leading to higher volume of production, expansion of business and new product lines, increased government spending and the seasonal uptick in demand during summer, enrolment and harvest seasons”. Economic expansion is expected for the coming quarters although growth is expected to slow down for the wholesale and retail trade sector due to the rainy season, high electricity costs and stiff domestic competition.

2. Technological Innovations

A crucial development in the sector is the government’s investment in telecommunications and information and communication technology (ICT) infrastructure. Although the project was originally conceived as a means of strengthening the growing IT-BPO industry, the benefits of more efficient and wide-spread ICT infrastructure will spill over to other industries as well, including the wholesale and retail sector. Fuelling the expansion and development of WRT firms further are the spreading awareness and adaptability of consumers to ICT, the increasing usage of land lines, mobile phones, and computers and internet access. It was claimed that these advancements “speed[s] up the production and inventory management processes of many businesses, and, thus, facilitate their growth”. The emergence of warehouse clubs, bar coding, and electronic databases, for example, contribute to higher productivity, greater efficiency, and lower costs not only for WRT enterprises but for their clients as well. Innovative business practices, for example, aided the expansion of SM centers and hypermarkets in to even the remotest areas of the Philippines, which benefits not only SM but also citizens of the communities to which they located in terms of

increased employment and access to a variety of goods and services.

B. Employment Prospects

The recent LABSTAT Updates of BLES points to the steady demand – a 34.1% increase in the 2009/2010 number of vacancies among the surveyed firms relative to the 2007/2008 respondents, often, shortages of workers in the wholesale and retail trade sector. Based on the BLES data, the Technical Education and Skills Development Authority (TESDA, 2011), reported that “two in every three vacancies were found in the service sector (65.7% or 181,872)”. The wholesale and retail industry ranked second in terms of the most number of job openings (26,478). Indeed, at least three of the top ten vacancies in industry and services sectors from January 2009 to June 2010 were occupations in the WRT – customer service representatives/associates (ranked number 1), cashiers and ticket clerks (ranked number 5) and technical and commercial sales representatives (ranked number 7).

Chapter 5

Challenges and Recommendations

The TESDA and BLES reported that “one in every five vacancies [in January 2009 – June 2010] was hard-to-fill”. Within the major occupations in the industry and services sectors, WRT-sector hard-to-fill vacancies included: sales and marketing managers, technical and commercial sales representatives, buyers, calculating machine operators, and motor vehicle mechanics and related trades workers. These vacancies “took an average of almost four (4) months” in which to find and hire suitable applicants TESDA claimed that while “recruiting the best applicants for the firms vary across occupations”, hard-to-fill vacancies, in general, can be attributed to a seeming shortage of skilled workforce – as evidenced by either a relatively smaller number of applicants for the number of available positions or numerous applicants “but with few qualified ones”. TESDA’s findings, therefore, point to the importance of education and skills acquisitions for both sources of recruitment difficulties – the former spells lucrative prospects for recipients of the required training in the hard-to-fill vacancies while the latter draws attention to the suitability and quality of the training received by graduates of Philippine educational institutions. The difficulties encountered by employers in finding “the specific skills or specializations that match the qualifications or competencies required by the job” may be addressed through stronger linkages between education and training institutions and industry (i.e., participation of industry leaders in designing training programs and course curriculum, meaningful/practical on-the-job training or apprenticeship programs, etc.).

Indeed, during the 23 August 2012 validation workshop, high-end, non-food, retail sector stakeholders emphasized the need to align the skills developed by higher level educational institutions with needs of the retail industry through the creation of a retail management college degree program. Similar to the programs offered in countries like Australia, Singapore and the United Kingdom, the undergraduate program can focus on the development of specialized retail skills like retail store operations, supply chain management, brand management, visual merchandising, etc.

Currently, the Validation Workshop participants stated that WRT sector is the “employer of last resort”. Thus, professionalizing the various occupations of the wholesale and retail industry, especially for the high-end, non-food retail sub-sector, is an important step in improving the competitiveness of the local industry given a dynamic and global business environment. Indeed, the participants claim that some retailers are opening stores/branches at a rate of five stores a month. Each store requires five-to-ten employees, which are not immediately hired owing to the lack of qualified applicants. The Validation Workshop, thus, recommended that, in terms of labor skills development attracting competent workers in the sub-sector can begin with designing local certification programs that – through associations and links with global brands - are recognized abroad. The high-end, non-food retail subsector participants, however, contended that associate degrees and, ultimately, college degree programs that address the specialized skills requirement of the high-end, non-food retail subsector should also be seriously considered and pursued. Likewise, the issue of who will provide the training and who will shoulder the cost of acquiring the needed skills (i.e., retail companies, individual, etc.) must be tackled.

Compensation, especially in the entry-level occupations of the local retail industry, is expected to steadily rise with the increasing participation of global brands in the domestic economy as well as the expected improvements in competency and productivity of workers through the proposed certification, associate degree and college degree programs that focus on the needs of the subsector. The recognition of certificates and degrees earned in the Philippines by the industry’s employees would enhance the competitiveness and offer new opportunities for growth and development of local retailers and their workers.

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Annex 1: Wholesale and Retail Trade Industry Sub-categories

Division 50: Sale, Maintenance and Repair of Motor Vehicles and Motorcycles, Retail Sale of Automotive Fuel		Division 51: Wholesale Trade and Commission Trade, Except of Motor Vehicles and Motorcycles		Division 52: Retail Trade, Except of Motor Vehicles and Motorcycles, Repair of Personal and Household Goods	
501	Sale of Motor Vehicles	511	Wholesale on a Fee or Contract Basis	521	Non-specialized Retail Trade Stores
502	Maintenance and Repair of Motor Vehicles	512	Wholesale of Agricultural Raw Materials and Live Animals	522	Retail of Food, Beverages and Tobacco in Specialized Stores
503	Sale of Motor Vehicles Parts and Accessories	513	Wholesale of Household Goods	523	Other Retail Trade of New Goods in Specialized Stores (excluding computers, computer peripheral equipment and software)
504	Sale, Maintenance and Repair of Motorcycles and Related Parts and Accessories	514	Wholesale of Non-agricultural Intermediate Products, Waste and Scrap	524	Retail Sale of Second-hand Goods in Stores
505	Retail Sale of Automotive Fuel	515	Wholesale of Machinery, Equipment and Supplies (excluding computers, computer peripheral equipment, electronic parts and equipment, and other machinery supplies)	525	Retail Trade not in Stores
		516	Wholesale of Computers, Computer Peripheral Equipment and Software	526	Repair of Personal and Household Goods
		517	Wholesale of Electronic Parts and Equipment	527	Retail Sale of Computers, Computer Peripheral Equipment and Software
		518	Wholesale of Other Machinery, Equipment and Supplies	528	Retail Sale of Communications Equipment
		519	Other Wholesaling	529	Retail Sale of Audio and Video Equipment

source: 2005 Annual Survey of Philippine Business and Industry, NSCB.

Annex 2: Regional Analysis of the 2009 ASPI Data for the Overall Wholesale and Retail Trade Industry for Establishments with Twenty or More Employees

Establishments with Twenty or More Average Total Employees in the Wholesale and Retail Trade Industry Summary Statistics by Region, 2009 (PhPValues in thousands)

Region	Number of Establishments	Employment			Gross Addition to Fixed Assets	Value Added	Total Revenue	Total Cost
		Total	Paid	Ave./Establishment				
NCR	2,604	163,185	162,641	63	4,952,369	79,859,642	885,052,132	843,623,155
CAR	45	2,213	2,187	49	10,103	702,146	5,214,841	4,532,497
Region I	100	4,955	4,914	50	118,083	1,284,913	22,521,007	21,616,908
Region II	50	2,322	2,269	46	25,557	596,624	7,045,637	6,621,204
Region III	296	15,565	15,488	53	360,892	6,654,299	85,590,019	80,959,605
Region IVA	430	22,148	22,056	52	598,628	9,662,951	105,473,815	97,838,346
Region IVB	35	1,649	1,634	47	8,196	380,688	5,326,059	5,051,056
Region V	78	4,454	4,384	57	24,822	1,644,854	14,870,672	13,660,369
Region VI	232	14,153	14,023	61	668,974	3,650,106	40,564,366	38,027,798
Region VII	333	25,504	25,363	77	1,122,251	9,306,284	89,694,521	83,372,650
Region VIII	72	3,570	3,526	50	194,365	1,068,595	10,765,482	10,047,557
Region IX	66	3,446	3,429	52	21,980	571,624	7,638,404	7,220,803
Region X	164	10,178	10,153	62	236,025	3,063,085	29,476,150	27,226,920
Region XI	214	15,244	15,184	71	287,507	3,996,990	39,680,119	36,079,941
Region XII	105	6,087	6,063	58	77,882	2,125,944	15,422,355	14,009,291
Region XIII	56	2,974	2,935	53	10,782	473,031	7,824,706	7,429,278
ARMM	5	237	231	47	35	29,097	185,033	164,130
Total	4,885	297,883	296,480	61	8,718,450	125,070,873	1,372,345,318	1,297,481,509

source: 2009 Annual Philippine Survey of Business and Industry Wholesale and Retail Trade; Repair of Motor Vehicles, Motorcycles and Personal and Household Goods. Retrieved on 15 June 2012 from http://www.census.gov.ph/data/sectordata/aspi09_sectgfx.html.

Annex 3: Top Food and Non-food Retailers in the Philippines

Taken from Retail Asia, the Retail Business Magazine (from www.retailasiaonline.com). The ranking reflects robust sales turnover growth among Asia-Pacific's major retailers. The official market information provider of Retail Asia in determining the Top 500 is Euromonitor International. The Top 10 retailers in the Philippines are listed in the tables below, classified by Food and Non-Food Retailers.

Top Food Retailers in the Philippines according to Sales

Rank	Outlet Type	Fascia(s)/brand(s)	Retail Company	Outlets	Sales 2010	Sales Share 2010	Sales 2011	Sales Share 2011
1	Various	Save More Supermarket, et al	SM Retails	289	153,261	60	168,525	59.701
3	Various	Rustan's Supermarket, et al	Rustan's Group of Cos	78	32,539	13	36,086	12.784
4	Dept. Store	Puregold	Puregold Price Club	48	27,443	11	29,639	10.5
5	Various	Robinsons Supermarket, et al	Robinsons Retail Group	476	26,638	10	28,723	10.175
7	Various	San Miguel Food shop, Monterey Meat shop	San Miguel Corp	387	10,720	4	11,794	4.1781
8	C-Store	7-Eleven	Philippine Seven Corp	551	6,917	3	7,516	2.6626
	Food Total			1,829	257,518	100	282,283	100

source: Retail Asia Online; Sales is expressed in millions of PhP.

Top Non-Food Retailers in the Philippines according to Sales

Rank	Outlet Type	Fascia(s)/brand(s)	Retail Company	Outlets	Sales 2010	Sales Share 2010	Sales 2011	Sales Share 2011
2	Health & Beauty	Mercury Drug, Mercury Self-Serve	Mercury Drug Corp	773	74,252	75	77,728	74.335
6	Health & Beauty	Watsons	Watson's Personal Care Store	243	13,063	13	14,043	13.43
9	Hardline	Abenson	Abenson	68	6,989	7	7,408	7.0847
10	Hardline	Ace Hardware	Ace Hardware Philippines	50	4,896	5	5,385	5.15
	Non-Food Total			1,134	99,200	100	104,564	100

source: Retail Asia Online; Sales is expressed in millions of PhP.

Annex 4: List of WRT-Related TESDA Courses

Course	Description	NC
Customer Services	This course is designed to enhance the knowledge, skills and attitude of Customer Services workers in accordance with industry standards. It covers the basic, common, core and elective competencies on preparing products for display, interacting with customers, selling products and services, operating retail equipment, balancing register/terminal, performing stock control procedures, merchandizing food products, and performing merchandise presentation skills.	II
Automotive Body Painting	This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of automotive body paint refinishing in accordance with industry standards. It covers specialized competencies such as: prepare undamaged surface for painting, apply and remove masking, spray solid color paints, and perform polishing. This course is also designed to equip the individual the desirable basic and common attitudes and skills of the automotive vehicle servicing.	I
	This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of automotive body paint refinishing in accordance with industry standards. It covers specialized competencies such as: assess automotive painting jobs; prepare undamaged and damaged surface for painting, apply masking, perform solid and metallic color mixing; spray solid color paint, spray metallic color paint; repair solid color paints; and perform polishing.	II
	This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of automotive body paint refinishing in accordance with industry standards. It covers specialized competencies such as: perform metallic and special color repair; perform Special Color Matching and application of Pearl or Mica Colors.	III
Automotive Driving/Light Vehicle Driving	This course is designed to equip the individual the desirable attitudes and skills of the land transport light vehicle driver in accordance with industry standards, including the regulatory requirements issued by appropriate regulatory bodies, government and/or private. It covers the following four core competencies: Carry Out Vehicle	II

	Maintenance and Servicing, Drive Light Vehicles, Obey and Observe Traffic Rules and Regulations and Implement and Coordinate Accident/Emergency Procedures. This course is also designed to equip the individual the basic and common knowledge, skills and attitudes of the land transport light vehicle driver in accordance with industry standards	
Automotive Electrical Assembly	This course is designed to equip individual the competencies that a person must achieve to be able to install/fit out electrical parts and electronic units into automotive vehicle body. It covers the area of dash panel instrument, interior compartment, exterior, and engine room compartment of an automotive vehicle body. It also includes the installation of audio and video systems and headlight focus aiming operations. This course is also designed to provide basic and common skills to equip individual with operational skills in automotive mechanical assembly.	II
	This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of automotive manufacturing in accordance with industry standards. It covers core competencies such as; Rectify faults on installed electrical parts to engine assembly; Rectify faults on installed electrical parts and electronic units to body interior compartment; Rectify faults on installed electrical parts and electronic units to dash instrument panel; Rectify faults on installed electrical parts to exterior and engine compartment; and Rectify faults on installed audio and video system to automotive vehicle. This course is also designed to provide basic and common skills to equip individual with operational skills in automotive electrical assembly.	III
Automotive Engine Rebuilding	This course is designed to equip individual with operational skills in automotive engine rebuilding which restores defective/worn-out engine parts back to manufacturer's specifications; performs the necessary inspections; mensuration, and interpretation of blueprints and repair procedures; set up and operate variety of specialized metal working machines and uses precision measuring instruments in repairing automotive engine parts. This course is also designed to provide basic	II

	and common skills to equip individual with operational skills in automotive engine rebuilding.	
Automotive Mechanical Assembly	This course is designed to equip individual the competencies that a person must achieve to be able to conduct engine hot test, rectify assembly faults on assembled mechanical assemblies, rectify faults on mounted/installed brake and fuel system, rectify faults on mounted/installed power drive system, and rectify faults on mounted/installed suspension drive train. This course is also designed to provide basic and common skills to equip individual with operational skills in automotive mechanical assembly.	III
Automotive Servicing	This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of automotive servicing in accordance with industry standards. It covers basic, common and core competencies such as: perform gas and diesel tune-up, service automotive battery service ignition system, test and repair wiring/lighting system, perform under chassis preventive maintenance and perform shop maintenance.	I

	<p>This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of automotive servicing in accordance with industry standards. It covers basic, common and core competencies such as: service charging and starting system, service engine mechanical system, service clutch system, service differential and front axle, service steering system, overhaul manual transmission, service brake system and service suspension system.</p>	II
	<p>This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of automotive servicing in accordance with industry standards. It covers core competencies such as; test and repair electrical security system/components; service and repair electronic engine management system; overhaul engines and associated components; service automatic transmission; perform maintenance service check-up and repair to air-conditioning system; and service and repair aircon compressor and associated components.</p>	III
	<p>This course is designed to enhance the knowledge, desirable attitudes and skills of automotive service technician in accordance with industry standards. It covers core competencies such as; service diesel engine management system; service electronic body management system; service diesel fuel injection system; service electronic drive management system; and service emission control system.</p>	IV
<p>Motorcycle/Small Engine Servicing</p>	<p>This course is designed to enhance the knowledge, skills and attitudes of an individual in the field of motorcycle/small engine servicing in accordance with industry standards. It covers core competencies such as; performing periodic maintenance; service carburettor and fuel system; service lubricating system; perform troubleshooting; service ignition system; service and repair exhaust system; service and repair suspension system; service and repair brake system; service wheels and tires; service clutch system; service electrical system; service final drive; and service and repair cooling system of motorcycle/small engines. This course is also designed to equip the individual the basic and common knowledge, skills and attitudes of the</p>	II

	motorcycle/small engine mechanic in accordance with industry standards.	
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Note: The listed courses and their descriptions have been taken directly from TESDA's website: www.tesda.gov.ph, looking at their competency based curricula and their corresponding regulations.