



GREEN BUILDINGS MARKET INTELLIGENCE PHILIPPINES PROFILE

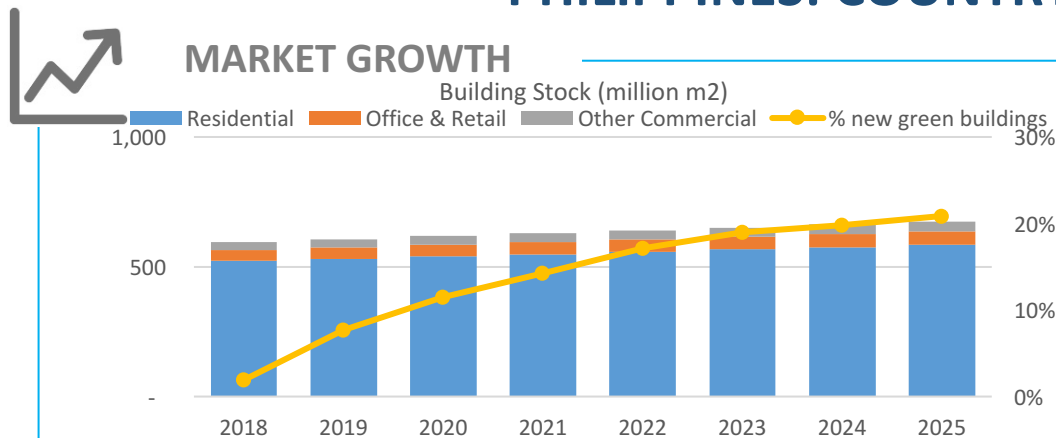


Creating Markets, Creating Opportunities



PHILIPPINES: COUNTRY SUMMARY

MARKET GROWTH



Market through 2025	Total market	Green market
Commercial	USD 18 B	USD 2 B
Residential	USD 80 B	USD 12 B
Residential units	1.7 M	100,000

CLIMATE POLICIES (NDCS)



- Philippines intends to reduce its GHG emissions by 70% below BAU by 2030, conditioned on the extent of financial resources.
- Mitigation strategy by Philippine Government since 2015.

MARKET STATUS



- Annual growth rate of commercial and residential buildings is estimated at 5.14%.
- Generated 355M Philippine pesos in cost savings within the first 3 years of green building implementation.
- Philippine government supports and helps to expand development of green buildings.



OTHER FACTORS

- DOE strengthen commitments in promoting clean energy technologies.
- Institutional investors prefer green buildings and ESCOs are present to support green building investment.



GREEN BUILDING PROGRAMS

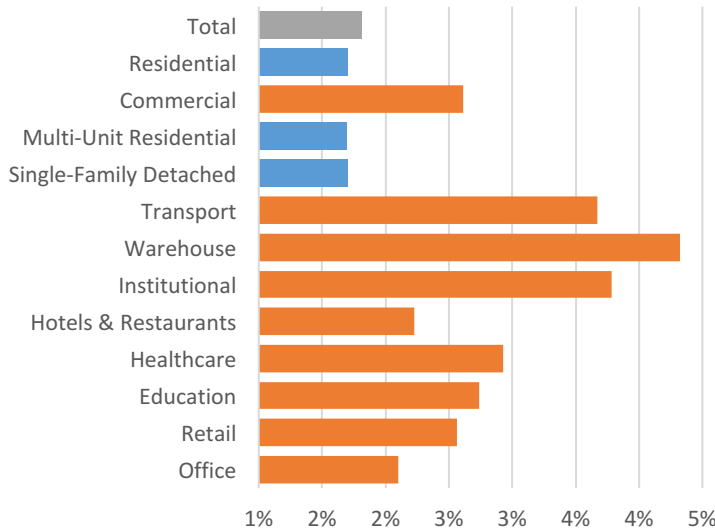
- Philippine Green Building Council is established member of WGBC.
- Philippine Green Building Initiative is another body committed to green standards.
- IFC partnered with PGBI in 2016 to launch EDGE certification program.
- IFC's program is supported by in-country program manager and technical experts.
- 9 EDGE Experts certified.
- 91 green projects tracked through EDGE and other certifications.

Source: Navigant Research Global Building Stock Database



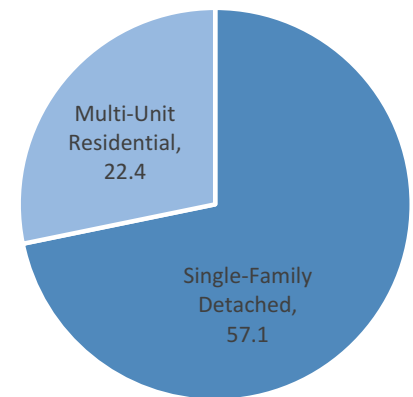
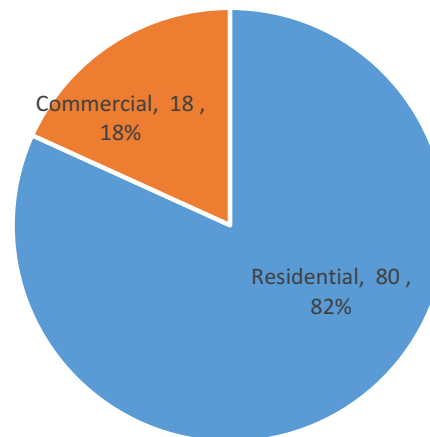
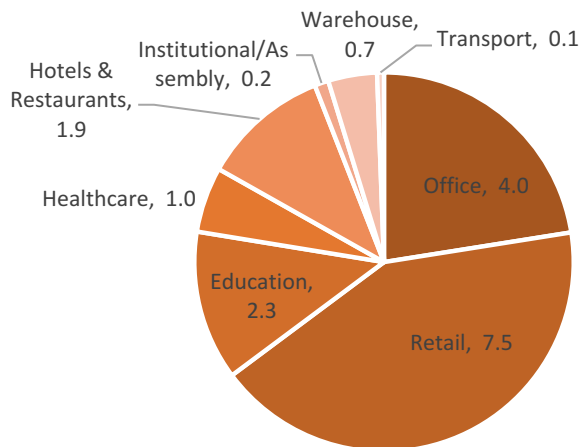
HEALTHY GROWTH EXPECTED ACROSS THE INDUSTRY

MARKET GROWTH BY SUB-SECTOR (CAGR)



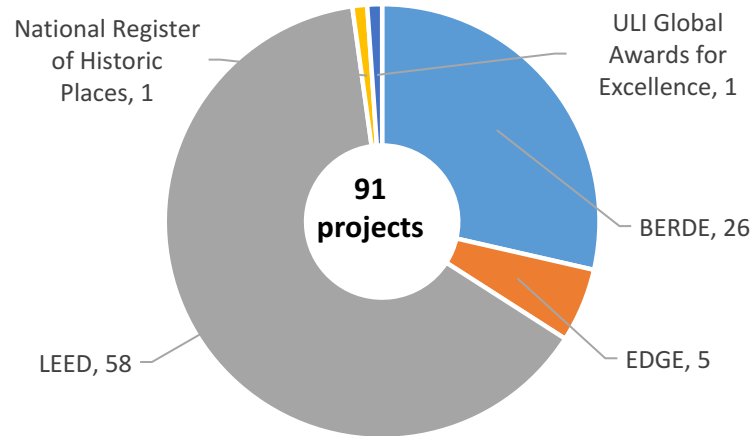
- Philippines is experiencing moderate growth across its sub-sectors.
- The commercial sector is growing faster than residential, but the residential stock still dominates the overall market.

TOTAL MARKET SIZE 2018-25 (USD BILLIONS)





OVER 90 GREEN PROJECTS TRACKED



Cumulative activity count, by year:



Geographic spread



Recent projects include:

- Toyota Angeles
- Filinvest Axis Tower One
- Polaris
- Megaworld Uptown Place
- BDO Corporate Center Ortigas
- One World Place
- ESFI Food Processing Plant
- UnionBank
- SM Aura Premier
- Asian Devt Bank HQ
- Sunpower ROH
- Vector Three
- Arya Residences
- Tera Tower
- Bench Tower
- Toyota Alabang, Inc.
- 8 Rockwell
- Cocolight Building
- JY Campos Center



HIGH EXPECTATIONS FOR THE GREEN MARKET

- Green buildings can reach as high as 20-25% of the market in 2025 due to combination of policy support, tax benefits, educational and awareness programs, and realized savings from energy efficiency.
- IFC projects that the overall percentage of new green building is expected to increase by 2% to 5% steadily every year, at least until 2030.
- This is in part due to IFC's own EDGE program, combined with other international and local rating tools.





SEVERAL PROGRAMS TO PROMOTE GREEN ECONOMY

GOVERNMENT POLICIES AND SUPPORT

- Green Building Act
- Renewable Energy Act of 2008 (RA 9513)
- Feed-In Tariff System (FIT)
- Philippine Green Building Code
- And many more..

Philippine Green Building Council (PHILGBC) also develops BERDE program to proactively address the negative impacts of climate change in the property sector.



ProGED

Supported by GIZ, DTI-ROG created ProGED, 225-million PHP project in 2013-2016 that aims to enhance the competitiveness of MSMEs by helping them adopt climate-smart and environmental friendly strategies.

Results:

- 450 enterprises adopted green practices, mostly in energy efficiency and solid waste management.
- Established Green Growth Core Group.
- In Tourism:
 - 5 hotels awarded ASEAN Green Hotel Award
 - 66 enterprises awarded for their green effort
- And many others green benefit accomplishments.

Learn more at:
<http://greeneconomy.ph/>



INTERNATIONAL AND LOCAL GREEN RATING TOOLS HELP GROW THE GREEN MARKET

WHAT IS BERDE?



BERDE (Building for Ecologically Responsive Design Excellence) is Green Building Rating scheme developed by PHILGBC, used to measure, verify, and monitor the environmental performance of buildings that exceeds existing mandatory regulations and standards.

BERDE is the Philippines' Voluntary Green Building Rating System adopted as such under the Philippine Energy Efficiency Project – Efficient Building Initiative (PEEP-EBI) of the DoE.

BERDE RATING SCHEMES



New Construction (NC) applies to the design and construction of new buildings

- Commercial Buildings
- Vertical Residential Development
- Clustered Residential Development
- Educational Buildings



Retrofits and Renovations (RR) applies to existing buildings with major retrofit or renovation activities

- Commercial Buildings
- Vertical Residential Development
- Clustered Residential Development
- Educational Buildings



Operations (OP) applies to existing buildings that have undergone no or minimal renovation or retrofit activities

- Operations



IN-COUNTRY EDGE EXPERTS CAN HELP PROJECTS NAVIGATE THE EDGE CERTIFICATION PROCESS

PHILIPPINES

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A full list of EDGE experts can be found on the EDGE program website:
<https://www.edgebuildings.com/edge-experts/edge-experts-around-the-world>



LEARN MORE ABOUT EDGE CERTIFIED PROJECTS



PRIMAVERA RESIDENCE TOWER A & B

<https://www.edgebuildings.com/projects/primavera-residences-towers-a-b/>

Building Category: Residential

Predicted Savings of EDGE Certification:



33% Energy Savings



37% Water Savings



32% Less Embodied Energy in Materials



IMPERIAL HOMES

<https://www.edgebuildings.com/projects/imperial-homes/>

Building Category: Residential

Predicted Savings of EDGE Certification:



32% Energy Savings



28% Water Savings



38% Less Embodied Energy in Materials

To access these case studies and others, visit <https://www.edgebuildings.com/projects/>



EDGE CERTIFICATION IS FAST, EASY, AND AFFORDABLE

EDGE certification services in the Philippines are provided exclusively by PGBI:

PHILIPPINE
GREEN
BUILDING
INITIATIVE



Certification fee is calculated based on the project size:

All Buildings	Less than 5,000m ²	5,000m ² to less than 15,000m ²	15,000m ² to less than 30,000m ²	More than 30,000m ²
Registration Fee	\$200	\$200	\$200	\$200
Certification Cost	\$3,000	\$4,000	\$5,000	\$5,000 plus \$0.25/M ² in excess of 30,000M ²

**Residential building less than 200 M² will have registration fee of \$200 and a certification cost of \$450.

- All pricing is exclusive of 12% VAT.
- **Note**: the cost of hiring auditor is subject to final agreement between the auditor and client.

MORE DETAILS AND REGISTRATION FORMS:

<https://www.edgebuildings.com/countries/philippines/>