檔　　號：
保存年限：

台灣醫療暨生技器材工業同業公會
收 109.12.01 文
檔號：109824

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發文日期：中華民國109年11月27日
發文字號：經國字第10903125670號
速別：最速件
密等及解密條件或保密期限：
附件：Ilcos及Central Luzone投資環境及基礎建設簡介

主旨：檢送菲律賓貿工部投資署(BOI)提供盼我商加強投資菲國中呂宋(Central Luzon)及伊羅戈區(Ilocos)等地區之投資環境簡介及基礎建設等資料如附件，請轉知貴會會員廠商參考，請查照。

說明：

一、菲國貿工部長Ramon Lopez曾於相關會議中推薦，菲國境內之中呂宋區(Central Luzon)及伊羅戈區(Ilocos)等地區係我商可優先考慮投資進駐之地點。目前上述地區已有臺商進駐，並將隨地區開發逐步擴大經營及建立產業供應鏈。

二、旨揭資料重點如下：

(一)中呂宋區(Central Luzon)

1、基礎建設方面：未來將推動之基礎建設大型建案包括蘇比克-克拉克鐵路、巴丹-佳美地跨海大橋、北路通勤鐵路、擴建蘇比克港口、開發新克拉克市、克拉克國際機場第2航廈、連接Tarlac省及Zambales省之Capas-Botolan公路及Central Luzon公路(第1、2期)。

2、投資環境方面：涵蓋7個省及14個城市，2019年核准投資

金額為1,206.6億披索(約合24.13億美元)，占全國核准投資總金額之9.2%。優先招商項目為製造業、基礎建設、農林漁牧業、新鮮食品及加工食品、資通訊及商業流程外包服務(BPO)、醫療衛生與保健產品及服務、培訓機構、發電(再生能源)、物流、廢棄物處理、手工藝品、觀光及航太等產業。

(二)伊羅戈區(Ilocos)：涵蓋4個省級9個城市，2019年核准投資金額為146.7億披索(約合2.93億美元)，占全國核准投資總金額之1.1%。優先招商項目為咖啡、加工食品與核果、手工藝品、肉品加工及資通訊等產業。

三、本案聯絡人：馬尼拉經濟文化辦事處商務組及菲律賓臺北貿易暨投資中心投資官：

(一)林彥成，聯絡電話：02-26588223，電子郵件:terrylin@philippinetrade.org。

(二)蔡欣惠，聯絡電話：02-26588226電子郵件：lorrainegailchua@philippinetrade.org。

四、另有意臺商亦可透過本部投資業務處於菲律賓設立之投資臺灣窗口取得菲國投資法規、產業資訊等一般性諮詢服務，聯絡人：王明仁先生，電話：+63-2-8887-6688#150，電郵：taiwandesk-ph@kpmg.com.tw。

正本：中華民國全國工業總會、中華民國國際經濟合作協會、世界台灣商會聯合總會、台北市商業會、台灣省商業會、台灣區電機電子工業同業公會、台灣區車輛工業同業公會、台灣區家具工業同業公會、台灣區模具工業同業公會、台灣區醫療生技器材工業同業公會、台灣區製藥工業同業公會、台灣區照明燈具輸出同業公會、台灣區人造纖維製造工業同業公會、台灣食品產業發展協會、台灣製鞋工業同業公會、台灣區航太工業同業公會、台灣區塑膠製品工業同業公會、台灣區飲料工業同業公會、台灣區金屬品冶製工業同業公會、台灣區手工具工業同業公會、台灣機械工業同業公會、台灣區合板製造輸出業同業公會、台灣區光學工業同業公會、台灣區食品暨製藥工業同業公會、台灣電路板協會、台北市電腦商業同業公會、台灣區農機工

業同業公會、桃園市工業會、台灣區紡紗工業同業公會、台灣區螺絲工業同業公會、台灣區電子電機資訊產業工會、財團法人中華民國紡織業拓展會、台灣資源再生工業同業公會、台灣區物聯網產業技術協會、台灣毛衣編織工業同業公會、台灣區鑄造品工業同業公會、全國產業總工會、台灣馬達產業協會、台灣區帽子輸出業同業公會、台灣手提包公會

副本：經濟部部長室、經濟部陳政務次長室、駐菲律賓代表處、駐菲律賓代表處經濟組、馬尼拉經濟文化辦事處〔含附件〕

部長 王美花

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INFRASTRUCTURE PROJECTS IN CENTRAL LUZON

I. SUBIC-CLARK RAILWAY

- 72km rail connection is a component of the PNR Luzon System Development Framework providing initial freight service between the Subic Bay Freeport Zone and the Clark Freeport and Special Economic Zone, linking Subic Port with Clark International Airport and other major economic hubs in Central Luzon, especially New Clark City, and forming an integrated logistics hub for the development of Central Luzon as a new growth center to decongest Metro Manila.
- The technical evaluation for the Procurement for Engineering, Procurement, Construction, and Commissioning (EPCC)/Turnkey Contractor of the project is currently ongoing with the target award set in November 2020. The railway connection is set to be completed by 2022.
- Components: (a) A cargo and passenger railway system from SBFZ to CFZ -The railway will be eventually extended to New Clark City (NCC) formerly called Clark Green City (CGC); (b) Passenger service for SCRP will eventually connect with the North Commuter Rail Project (NCRP) at Clark; (c) A dry port will be developed in CFZ. This will serve as a one-stop terminal for cargo handling, including customs clearance services, domestic distribution, and facilities for storage and consolidation of goods

II. BATAAN-CAVITE INTERLINK BRIDGE (approved by NEDA ICC Cabinet Committee on 12-20-2019)

- 32.15 km, 4 lane (2 lanes in each direction) bridge starting from Brgy Timalan, Naic Cavite and will end in Brgy Alas-asin, Mariveles, Bataan. It will have two navigation bridges, interchanges, land viaducts, turnaround facilities, special span bridge near the Cavite coast, toll plaza, and administration building.
- Road connections and linkages on the land side will also be improved
- Bridge will provide an alternative route when traveling from Bataan and Zambales provinces when going to Metro Manila and vice versa
- Bridge will serve as a bypass route for those coming from North Luzon going to South Luzon without passing Metro Manila and vice versa
- Will help decongest the existing major road corridors such as the NLEX, Maharlika highway and Roman Highway when going to Bataan province

III. NORTH COMMUTER RAIL

- Caloocan to Malolos, Bulacan then to Clark, Pampanga:
    - NCR Phase 1: a 38km high standard commuter railway from Tutuban to Malolos, Bulacan. Phase 1 has initially 10 stations including Tutuban, Solis,

Caloocan, Valenzuela, Meycauayan, Marilao, Bocaue, Balagtas, Guiguinto, and Malolos

- NCR Phase 2: a 53 km line from Malolos to Clark, Pampanga. Phase 2 starting from Malolos will have additional stations of Calumpit, Apalit, San Fernando, Angeles, Clark and Clark Intl Airport and eventually

- Upgrading of the existing single track to an elevated dual-track system -Converting the rail gauge from narrow gauge to standard gauge -Linking Manila to Malolos City, Bulacan and further on to Angeles, Clark Special Economic Zone and Clark International Airport

IV. SUBIC PORT CARGO CAPACITY EXPANSION

- Construction of a new container terminal/Rehabilitation of existing port facilities/Purchase of overhead cranes in SBFZ (which is 80 km northwest of Metro Manila) for faster handling of container cargo to increase cargo throughput of the port, including accommodation of big ships like the PANAMAX
- The objectives of the project are (a) to increase cargo handling capacity for the Subic Port, (b) facilitate and promote efficient distribution of goods in the Central Luzon including the Subic thereby contributing to promotion of regional economic development and (c) to alleviation of congestion at Manila Port.

V. NEW CLARK CITY

- 9,450-hectare master-planned city located within the Clark Special Economic Zone. The comprehensive master development plan and design standards and guidelines are formed in collaboration with Japan Overseas Infrastructure Investment Corporation for Transport and Urban Development (JOIN), and in partnership with renowned urban planning and engineering firms AECOM, Nippon Koei, Philkoei and Surbana Jurong.
- disaster-resilient location, and accessibility via major expressways, public transport, and airport.
- Pioneer developments in New Clark City:

a. NATIONAL GOVERNMENT ADMINISTRATIVE CENTER - 60-hectare area situated in the Civic Center of New Clark City. The development includes satellite offices for branches of the government, and world-class sports facilities including an athletics and outdoor stadium, aquatics center, and athletes' village, which were used as venues for the 30th Southeast Asian Games. NGAC will also feature residential, medical, and commercial developments to support the activities in the sports complex.

b. FILINVEST AT NEW CLARK CITY – 288-hectare development, envisioned to create a future ready, environmentally friendly, sustainable and liveable setting

encompassing mixed uses including industry and residential, nested in a vibrant live-work-play-learn environment. It is the strategic center of economic activities that fosters the fusion of local and international investors. Filinvest is looking for business locators or long term lessees for the industrial park. A 120-hectare industrial Park in New Clark City will be developed through a joint venture partnership between BCDA and Filinvest Land Inc (FLI).

The mixed-use industrial area will house an innovation park, a research and development district, and a lifestyle mixed-use district for hotels, office buildings and commercial establishments. The Innovation Park is targeting industries from the light manufacturing sector, logistics, storage, warehousing, cold storage and food processing. The first phase of the development has a land area of 62 hectares.

c. NEW CLARK CITY MIXED-INCOME HOUSING -- A residential complex offering affordable housing units for low to middle income employees working in New Clark City and nearby economic hubs. With an allocated area of 27.5 hectares, this housing project features buildings with inter-connected green roofs that allows biking, planting and gardening. It will also include several amenities such as basketball courts, swimming pool, indoor recreational facility and function hall.

d. NEW CLARK CITY AGRO-INDUSTRIAL HUB -- The BCDA and the Department of Agriculture are planning to put up an Agro-Industrial Hub in New Clark City aimed to support farming communities, and strengthen food security in Luzon.

   The New Clark City Agro-Industrial Hub seeks to integrate small-scale farmers, and provide access to production resources such as technology, capital, and value-enhancing facilities. The Project will consolidate the food supply chain and post-harvest production system (e.g., fruits, vegetables, poultry and livestock) for Northern and Central Luzon, Metro Manila and even neighboring countries, for niche markets (organic produce, halal-certified goods).

   The project will also house agri-business hubs and multi-purpose facilities that will be key to managing and integrating the food supply chain, as well as introducing innovative agricultural technology to farmers first to be put up will be the National Seed Technology Park.

e. WORLD CLASS LEISURE FACILITIES-- The BCDA signed a lease agreement with Widus Consortium to develop Hann Lux—a 450-hectare luxury resort in New Clark City that will be the niche of global hospitality brands such as the Banyan Tree, Angsana, Westin and Luxury Collection by Marriott.

   Hann Lux will have three 18-hole championship golf courses. The first one will be designed by Nicklaus Design, the second will be designed by South Korean

professional golfer KJ Choi, while the third will be the Sir Nick Faldo Signature Golf Course. The project construction will be conducted in two phases and will also include an open space park development for activities which promote physical activities such as but not limited to trekking, glamping and mountain biking.

Sky Blue Golf and Resort -- a 250-hectare Park Golf Course that will be developed by a consortium of JB Cresta Corporation, POSCO Architects and Consultants Co. Ltd. and R&H Golf Architects. The first phase of development has a land area of 150 hectares and shall be composed of an eighteen (18)- hole golf course, a Clubhouse and a 5-hectare open space development.

f. NEW CLARK CITY ACCESS ROADS -- various access roads that will soon provide motorists a smooth and hassle-free travel between NCC and CRK and vice versa. These access roads include the NCC to Subic-Clark-Tarlac Expressway (84%), the CRK to NCC Phase 1 Road (92%) and the CRK to NCC Spur Road (84%) which will be completed by 2021. BCDA is also building the roads from CRK to NCC Phase 2 and Phase 3 areas.

One of the major features of the access roads is the Sacobia Bridge which connects NCC to other districts of Clark and reducing travel time to 15 minutes. Running across the Sacobia River in Tarlac, the steel bridge measures 894 meters long and 29.5 meters wide and contains a total of six main carriageways, two bike lanes and sidewalks.

g. LUZON IT BYPASS INFRASTRUCTURE PROJECT -- Ultrahigh speed information highway (at least 2 million Mbps) through a 250-km submarine cable along the Luzon Strait (to be provided by Facebook) that will land in the cable stations on the East and West Coasts of Luzon. The 5G connectivity will cover all SEZs from Bulacan to Pangasinan, including Clark SEZ and NCC.

Components: (a) 240 km multi-duct cable conduit path which will connect Poro Point and Baler, Aurora; (b) Backhaul Infrastructure – internet network between Poro Point and BCDA economic zones (NCC, Clark FZ, Bataan Technopark, etc.), (c) Last Mile Infrastructure – internet network within BCDA areas of jurisdiction

VI. CLARK INTERNATIONAL AIRPORT TERMINAL 2

- 82,600 m2 Passenger Terminal Building (PTB) of the CIA, with a design capacity of 8 million passengers per annum (MPPA)
- Building structure and landside infrastructure completed end of September 2020; to be operational starting January 2021 by the Luzon International Premiere Airport Development (LIPAD)

VII. CAPAS-BOTOLAN ROAD

- The road project directly links the provinces of Tarlac and Zambales while reducing travel time and transport cost. It has been under development since 2013 by the DPWH Regional Office. A total 32.26 kilometers of the road has previously been completed.

- DPWH plans to finish the remaining 36-kilometer road work, including seven bridges 1,081.8 meters in total length. The agency also plans to construct eight additional bridges with a cumulative total length of 1,612.82 meters.

VIII. CENTRAL LUZON LINK EXPRESSWAY (CLLEX) PHASE I

- 4-lane, 30-kilometer expressway from Subic-Clark-Tarlac Expressway (SCTEX) and Tarlac-Pangasinan-La Union Expressway (TPLEX) connection in Balincanaway, Tarlac City and ends at Daang Maharlika in Brgy. Caalibangbangan in Cabanatuan City, projected by DPWH to partially open in December 2020.

- The PhP14.94-billion flagship infrastructure is designed to facilitate the movement of goods and services from SCTEX and TPLEX to the eastern part of Luzon towards Cagayan Valley bypassing some town centers of Bulacan and Nueva Ecija. It will cut travel time between Tarlac City and Cabanatuan City from 70 minutes to just 20 minutes (DPWH)

IX. CENTRAL LUZON LINK EXPRESSWAY (CLLEX) PHASE II

- To provide an important lateral (east-west) link of overall Expressway network of Region III;
- for feasibility study

Other Significant Projects in Central Luzon:

1. Science and Technology Center (New Clark City)-- The Department of Science and Technology proposed the establishment of the Virology Science and Technology Institute of the Philippines (VSTIP) that will be the country's premier research institute in the field of virology. The institute will prioritize research on infectious diseases and strengthen local vaccine development.

2. The Anti-Red Tape Authority (ARTA) is working with local government units (LGUs) for a full nationwide rollout of online one-stop shops for their permits by next year. In addition, efforts are also being done to engage with LGUs in the Subic-Clark corridor for ease of doing business.

3. NEDA has commissioned consultants to master plan the environs of Olongapo City, impacting the Subic area, which includes feasibility studies on long term projects including other access roads that will link the SCTEx to other areas in SBFZ and the planned Subic-Clark Railway project as well as transportation linkages in the corridor

4. Included in long term plans of some LGUs in the Subic-Clark corridor are: solid waste management projects that will impact the Subic-Clark corridor, cold storage facilities, development of other residential, industrial and agro-industrial sites

ILOCOS REGION (R1)

Economy at a Glance

MACROECONOMICS	2018	2019
GRDP (US$ M)	550.43	n/a
GRDP GR(%)	6.5	n/a
GRDP Share to GDP (%)	3.1	n/a
Share to PH Exports (%)	0.4	0.5
Inflation Rate (%)	6.0	2.4
Unemployment Rate (%)	6.8	5.3
Daily Min Wage (PhP)	282.00 - 340.00	

MERCHANDISE EXPORTS *(in US$, GR in %)*	2018	2019	GR
Region I	**266,933,815**	**338,849,186**	***26.9***
Ilocos Norte	1,620,642	7,941	*(99.5)*
Ilocos Sur	2,541	4,320	*70.0*
La Union	67,275,404	1,508,781	*(97.8)*
Pangasinan	255,668	203,157	*(20.5)*

TOP EXPORT PRODUCTS, 2019 *(in US$. Share in %)*	Value	Share
1. Copper ores and concentrates	214,794,995	*63.4*
2. Other unwrought gold, non-monetary	108,226,431	*31.9*
3. Other semi-manufactured forms, non-monetary	13,605,588	*4.0*
4. Other natural sands of all kinds, whether or not coloured, other than metal-bearing sands of chapter 26	1,893,150	*0.6*
5. Handbags, whether or not with shoulder strap, including those without handle, with outer surface of leather, of composition leather or of patent leather	200,572	*0.1*

APPROVED INVESTMENTS* *(in PhP M)*

2018: 13,599.01 Share: *1.3%*
2019: 14,674.72 Share: *1.1%*
Growth Rate: *7.9%*

PRIORITY SECTORS FOR INVESTMENTS

- Coffee
- Processed Fruits and Nuts
- Wearables & Homestyle Agriculture and fisheries
- (production/ processing)

Meat Processing

- Information and Communications Technology(ICT)

**Investments approved by the 7 investment promotion agencies: BOI, PEZA, SBMA, CDC, BOI-ARMM, AFAB and CEZA. Source: PSA*

REGIONAL PROFILE

Region I, also known as Ilocos Region, is located in the northwestern region portion of Luzon. It is bounded by the Cordillera Administrative Region and Cagayan Valley to the east, Central Luzon to the south and by the South China Sea to the west.

Economy in the region is anchored both on agriculture and agro-industrial sectors. Its provinces are famous for agro-industrial businesses such as milkfish (bangus) cultivation and processing, livestock raising, fish paste (bagoong) processing, among others. Income in the Ilocos provinces also come from cultivating rice, tobacco, corn, sugarcane, and fruits; and from raising livestock such as pigs, chicken, goats, and carabaos.

Land Area	Population
13,012.60 sq.km.	5,026,128 (as of August 2015)

Gross Regional Domestic Product (GRDP), 2018	Share to national GDP (%), 2018
12.3% - at current prices 6.5% - at constant 2000 prices	3.1% - at current prices 3.1% - at constant 2000 prices

Number of Provinces	Number of Cities
4 Ilocos Norte Ilocos Sur La Union Pangasinan	9 Batac City, Ilocos Norte Laoag City, Ilocos Norte Candon City, Ilocos Sur Vigan City. Ilocos Sur San Fernando City, La Union Alaminos City, Pangasinan Dagupan City, Pangasinan San Carlos City, Pangasinan Urdaneta City, Pangasinan

Number of Municipalities	Number of Barangays
116	3,265

Minimum Wage	
Sector / Industry	Ilocos Region
• Non-Agriculture and Retail/Services Establishments employing more than 10 • Agriculture • Retail/Service Establishments employing 10 and below	PhP282.00 – 340.00

List of Seaports	List of Airports
1) Currimao Seaport (Ilocos Norte) 2) Salomague Seaport (Ilocos Sur) 3) San Fernando Seaport (La Union) 4) Sual Seaport (Pangasinan)	1) Laoag International Airport 2) San Fernando Airport, 3) Vigan Airport (for chartered small plane flights) 4) Lingayen Airport

Land Resources

The region has prime agricultural land in spite of the scarcity of arable land due to its rough terrain. Its most important crops are tobacco, rice, and vegetables.

Water Supply

- Ilocos Norte Water District
- Metro La Union Water District
- Metro Vigan Water District
- Calasiao Water District
- Alaminos City Water District
- San Carlos City Water District
- Sto. Tomas Pangasinan Water District
- Dagupan City Water District
- Bayambang Water District
- Bugallon Water District
- Villasis Water District

Water Resources

River Basins:

- Agno River basin
- Amburayan River basin
- Laoag River basin

Major River Systems:

- Balingasay River
- Dasol River
- Balincaguing River
- Alaminos River
- Bued River
- Angalacan River
- Sinocalan River
- Agno River
- Dipalo River
- Buaya River
- Silag-Sta. Maria River
- Abra River
- Amburayan River
- Candon River
- Mestizo River

Communication Infrastructure

- Presence of voice and data (fiber optics) service providers
- Presence of DSL Broadband Internet Connectivity
- Presence of Wi-Fi Internet Connectivity
- Presence of numerous internet cafes
- Presence of mobile phone service centers and providers

Electrification

Power Plants

- Bauang Power Plant
- Sual Coal-fired Power Plant
- San Roque Multi-Purpose Project (Power Component)
- Wind Power in Bangui, Ilocos Norte

Electricity Providers

- Ilocos Norte Electric Cooperative, Inc.
- Ilocos Sur Electric Cooperative, Inc.
- La Union Electric Cooperative (LUELCO)
- La Union Electric Company, Inc. (LUECO)
- Pangasinan Electric Cooperatives I II & III (PANELCO)
- Central Pangasinan Electric Cooperative, Inc. (CENPELCO)
- Dagupan Electric Corporation (DECORP)

Other Endemic Resources

Region I is endowed with various mineral resources both metallic and non-metallic. Copper ore ranked the biggest deposit with about 54.6% of the total metallic reserves. Iron magnetite sand ranked second with about 31%, were found only in Ilocos Sur and La Union.

An important non-metallic mineral resource found in Vigan City is the kind of clay that is used in making earthen jars locally called burnay. Earthenware of different uses and sizes are made of this kind of clay. Known as Bantog clay, the mineral is the basic material in making bricks. These bricks are the original materials in building the Hispanic houses of Vigan City.

Pangasinan is rich in Minerals such as:
Metallic - Copper Ore, Chromite, Manganese
Non-Metallic – Limestone, Shale, Silica, Gabbro, Zeolite, Bentonite, White Clay, Guano/Rock Phosphate, Sand & Gravel

Financial Services	Healthcare Facilities
Total number of banks (2019 BSP): · 237 – Commercial/Universal Banks · 167 – Thrift Banks · 246 – Rural and Cooperative Banks	Total number of public hospitals: 140 Total number of private hospitals: 240 Source: CMCI

Major Industries

1. Agro-industrial
2. Service industry
3. Milkfish (bangus) cultivation and processing
4. Bio Energy
5. Fish paste processing (bagoong)
6. Rice, tobacco, corn, sugarcane, and fruits
7. Blanket-weaving
8. Burnay pottery
9. Marine/Aquaculture
10. Consumer Manufacturing
11. Salt Manufacturing
12. Processed Foods
13. Livestock raising pigs, chicken, goats, and carabaos (water buffalos)
14. Tourism Industry
15. Furniture
16. Gifts, Decors and Housewares
17. Processed Fruits and Nuts
18. Bamboo
19. Coffee
20. Cacao

EXPORTS and INVESTMENTS

Region I Export and Investment Statistics, 2018-2019

	Exports (in US$)		BOI-Approved Investments (in PhP M)	
	2018	2019	2018	2019
Region I	**266,933,815**	**333,849,186**	**13,181.47**	**14,406.72**
Ilocos Norte	1,620,642	7,941	7,093.53	1,933.10
Ilocos Sur	2,541	4,320	5,403.85	-
La Union	67,275,404	1,508,781	684.08	3,140.66
Pangasinan	255,668	203,157	-	9,332.97

Sources: PSA as processed by EMB for Exports, BOI for Approved Investments
Notes:

- *Specific to exports, details may not add up to totals as PH exports by region are based on the port or origin (port of loading) whereas the data by province of origin are based on where the products are originated*
- *Data by province of origin are indicative since not all exporters provide info on the origin of the products*

BOI-Approved Investments by Province, 2019

	Total Project Cost (PhP M)	Share (%)	No. of Projected Jobs	Share (%)
PHILIPPINES	**1,140,156.65**	***100.0***	**61,098**	***100.0***
Region I	**14,406.72**	***1.26***	**539**	***0.88***
Ilocos Norte	1,933.10	*0.17*	48	*0.08*
Ilocos Sur	-	-	-	-
La Union	3,140.66	*0.28*	161	*0.26*
Pangasinan	9,332.97	*0.82*	330	*0.54*

Source: BOI as processed by BTIPR

BOI-Approved Investments by Industry, 2019

Industry	No. of Approved Investments	Total Project Cost (PhP M)	No. of Projected Jobs
Total	**16**	**14,406.72**	**539**
1. Electricity, Gas, Steam, and Air Conditioning Supply	7	12,629.29	278
2. Transport and Storage	6	1,021.42	108
3. Accommodation and Food Service Activities	1	500.00	74
4. Agriculture, Forestry, and Fishing	2	256.01	79

Source: BOI as processed by BTIPR

BOI-Approved Projects

- Satrap Power Corporation (Ilocos Sur)
- San Manuel 1 Solar Power Project
- The Monarch Hotel – Calasiao
- Pryce Gas Incorporated, San Fabian
- Freshious Inc.

Source: ROG

List of Investment Opportunities

1) Agri/Agro/Forestry (Coffee, cacao, bamboo, mango oil crops plantations)
2) Marine/Aquaculture (Seaweeds, deep-sea fishing, mariculture)
3) Livestock and Poultry
4) Frozen and Processed Food (Coffee, cacao, fruit / vegetable processing; cold storage for fruits / vegetables
5) Manufacturing (tobacco paper, herbal/essences, furniture/furnishings, textile)
6) Infrastructure (Public utilities, tourism transport facilities, tourism site development)
7) Consumer Manufacturing (Novelty items, handmade / christmas decors
8) Engineering Industries (machine shops, automotive repair, maintenance services)
9) Emerging Industries (Retail Trade, Logistics, Real Estate, IT, Telecommunications, Delivery/Financial/ Healthcare Services, Production of PPEs, Repair of Highly Technical Gadgets)

10) Sual Commercial Seaport - Seaport construction to serve the needs of existing and proposed industrial and commercial activities in the province.

11) BPOs/Call Centers/ICT Centers Establishment of the province as an IT Hub to spur local economic growth

12) Fruits and Vegetables Processing Plant Construction of a processing plant that will house an office space and storage area for both raw materials and finished products.

13) Waste Management Projects > Sanitary Landfills > Waste Recycling Facilities > Waste to Energy Development Projects > Other Zero Waste Management Projects

14) Tourism Accommodations and Related Facilities and Services Construction of accommodation facilities (Resorts, Hotels, etc.) of international standards

15) Retirement Village The project aims to establish an up-market Retirement Village to cater to the growing "grey market" overseas and foreign retirees

16) Lingayen Airport Upgrading - Upgrading of the Feeder Airport into a Commercial Airport which involves runway expansion/extension and terminal office building construction

17) Commercial Marina Development Construction/ establishment of a commercial marina complex that includes the following: • 4 piers and docking areas
• hotel/motel building • social activities building • sales and service building • adequate inboard/outboard shop • swimming pool

18) Deep Sea Fishing Boat Repair and Ship Building The project entails the construction of a dock that will accommodate fishing boats and cargo ships repair.

19) Renewable Energy Development - Development of an alternative and clean energy source/s which will reduce GHG emissions (generated by the burning of fossil fuels) at the same time meet the future demand for electricity

Incentives to Registered and Existing Projects

1. Ilocos Norte

Fiscal Incentives

- All registered enterprises qualified under the Ilocos Norte Investment Code are granted full exemption from the payment of basic real property taxes of the 35 percent share of the Provincial Government within a specified period vis-à-vis actual investment infused.

- Additionally, qualified registered enterprises that invest more than Php60 Million shall receive 10 percent discount on the 35 percent provincial share from real property taxes for the succeeding

2) Pangasinan

Fiscal Incentives (Under the Pangasinan Investments and Incentives Code of 2016)

- Full exemption from payment of Governor's permit on business activities included in Chapter III, Article A, Section 42 of the 2012 Revenue Code of the Province of Pangasinan.

- Full exemption from the share of the province from the payment of Basic Real Property Tax acquired or built purposely for the project.

Non-Fiscal Incentives

- Special access to IPC services such as investment counselling, business visit facilitation, provision of data and information related to investments, business partner identification and matching, inventive availment, access to financial source & social services, trouble shooting and follow –up.

- Other incentives as approved by the Sangguniang Panlalawigan upon recommendation of the PIIB, especially for firms that employ more workers while increasing international competitiveness

3) Ilocos Sur

The City of Vigan offers investment incentives
new, expansion, modernization and diversification projects in the following investment priority areas (IPAs):

- Tourism Related Ventures
- Innovative & Pioneering Businesses
- Traditional Crafts & Industries
- Export Oriented Businesses
- Information & Communication Technology

Suggested Investment Options

- Health & Wellness
- Nursing Homes for the Aged
- Housing/Real Estate
- Renewable Energy

Incentives include the following:

a. Tax discount for New Enterprise of 30% (Large Scale), 25% (Medium Scale), 20% (Micro and Small Scale) Respectively for a period of 3 years
b. Additional 10% discount (business tax) shall be given to an enterprise whose labor force shall not be less than 60% from locality. Said discount shall be for a duration of 1 calendar year, renewable on a yearly basis for up to 3 years. Inclusive of the 1st year when granted
c. Incentives for innovative/pioneering businesses and investment priority areas
d. Assistance in hiring manpower requirements
e. Sourcing out of available resource materials
f. One-Stop shop business permit processing
g. Promotion of products and services Additional Incentive and Support Measures: The Provincial Incentives and Investments Board shall identify and recommend subject to the approval of the Provincial Board additional incentives and support measures which shall be extended to targeted investors, to promote priority investment areas and activities

REGION III

CENTRAL LUZON

Economy at a Glance

MACROECONOMICS	2018	2019
GRDP (US$ M)	1,716.67	n/a
GRDP GR(%)	7.1	n/a
GRDP Share to GDP (%)	9.8	n/a
Share to PH Exports (%)	7.6	11.2
Inflation Rate (%)	3.2	2.9
Unemployment Rate (%)	5.8	n/a
Daily Agri Min Wage (PhP)	342-390	
Daily Non-Agri Min Wage (PhP)	304-420	

MERCHANDISE EXPORTS *(in US$ M, GR in %)*	2018	2019	GR
Region III	**5,276.35**	**7,970.61**	***51.1***
Aurora	0.11	-	-
Bataan	1,079.69	783.18	*-27.5*
Bulacan	165.83	23.82	*-85.6*
Nueva Ecija	0.09	0.63	*600.0*
Pampanga	9,627.25	6,883.20	*-28.5*
Tarlac	324.47	299.19	*-7.8*
Zambales	1,967.79	2,445.58	*24.3*

APPROVED INVESTMENTS* *(in PhP M)*

2018: 215,876.62 Share: *19.9%*

2019: 120,668.42 Share: *9.2%*

Growth Rate: *(44.1%)*

TOP EXPORT PRODUCTS, 2019 *(in US$ M, Share in %)*	Value	Share
1. Semiconductor devices manufactured from materials on consignment basis	4,611	*57.9*
2. Electrical and electronic machinery, equipment and parts manufactured from materials on consignment basis	772	*9.7*
3. Digital monolithic integrated circuits	659	*8.3*
4. New pneumatic tyres, of rubber, of a kind used on motor cars (including station wagons and racing cars)	219	*2.7*
5. Other parts of aeroplanes or helicopters	104	*1.3*

PRIORITY SECTORS FOR INVESTMENTS

- Manufacturing & Subcontracting
- Infrastructure & Infrastructure Support Projects
- Agriculture, Agribusiness, Fishery & Forestry
- Fresh & Processed Foods
- ICT & BPO Services
- Healthcare & Wellness Products & Services
- Training & Learning Institutions
- Power Generation, especially renewable energy
- Logistics
- Waste Management Facilities
- Export-Oriented and Crafts & Products Industries
- Tourism
- Aerospace

**Investments approved by the 7 investment promotion agencies: BOI, PEZA, SBMA, CDC, BOI-ARMM, AFAB and CEZA. Source: PSA*

REGIONAL PROFILE

Envisioned to become the industrial heartland of the Philippines and the Asia Pacific; an international transshipment hub; and a showcase of a vibrant and competitive agriculture sector, Central Luzon is the logical destination for investments and leisure.

A growth region in the Philippines that contributes significantly to the national economy, Central Luzon is home to a number of industrial estates and economic zones with efficient water, power and telecommunication facilities; port facilities; road networks that create synergy between and among the economic and tourism points of Subic, Clark and the seven provinces; and, a strategic location that offers accessibility for the movement of people, goods and service from the North to Manila.

Land Area	Population
21,906.2 sq.km.	11,218,177 (as of August 2015)

Gross Regional Domestic Product (GRDP), 2018	Share to national GDP (%), 2018
11.1% - at current prices 7.1% - at constant 2000 prices	9.3% - at current prices 9.8% - at constant 2000 prices

Number of Provinces	Number of Cities
7	14
Aurora Bataan Bulacan Nueva Ecija Pampanga Tarlac Zambales	Balanga City, Bataan Malolos City, Bulacan Meycauayan City, Bulacan City of San Jose del Monte, Bulacan Cabanatuan City, Nueva Ecija Gapan City, Nueva Ecija Science City of Muñoz, Nueva Ecija Palayan City, Nueva Ecija San Jose City, Nueva Ecija Angeles City Mabalacat City, Pampanga City of San Fernando, Pampanga Tarlac City, Tarlac Olongapo City

Number of Municipalities	Number of Barangays
116	3,102

Minimum Wage		
Sector / Industry	Bataan, Bulacan, Nueva Ecija, Pampanga, Tarlac, Zambales	Aurora
Non-Agriculture		
• With 10 or more workers	420	369
• With less than 10 workers	413	
Agriculture		
• Plantation	390	354
• Non-Plantation	374	342
Retail/Service		
• Establishments with 10 or more workers	409	304
• Establishments with less than 10 workers	395	

List of Seaports	List of Airports
1) Port of Subic – Subic Bay Freeport Zone 2) Port of Limay (Lamao Port) – Limay,Bataan 3) Port of Mariveles – Mariveles, Bataan 4) Port of Masinloc – Masinloc, Zambales 5) Port of Casiguran – Casiguran, Aurora 6) Port of Dingalan – Dingalan, Aurora	1) Clark International Airport

Financial Services	Healthcare Facilities
Total number of banks (2019 BSP): · 590 – Commercial/Universal Banks · 331 – Thrift Banks · 420 – Rural and Cooperative Banks Total number of remittance centers (as per CMCI data, as of December 2018) - 1,737	(as per CMCI data, as of December 2018) Total number of public hospitals: 69 Total number of private hospitals: 150 Total number of medical clinics: 3,078

Major Industries

1. Electronics	6. Fashion Accessories/ Leather Goods
2. Machinery, Transport Equipment	7. Metal Manufacture
3. Other Consumer Manufactures	8. Petroleum
4. Garments/Textiles	9. Other Construction Materials
5. Other Industrial Manufactures	10. Food and Processed Food

EXPORTS and INVESTMENTS

Region III Export and Investment Statistics, 2018-2019

	Exports (in US$ M)		BOI-Approved Investments (in PhP M)		PEZA-Approved Investments (in PhP M)	
	2018	2019	2018	2019	2018	2019
Region III	**5,276.35**	**7,970.61**	**170,568.22**	**269,157.32**	**12,071.51**	**8,197.34**
Aurora	0.11	-	-	-	-	-
Bataan	1,079.69	783.18	85,879.10	17,159.03	519.77	3,785.96
Bulacan	165.83	23.82	25,844.69	27,810.74	504.64	-
Nueva Ecija	0.09	0.63	9,717.63	2,974.91	-	120.13
Pampanga	9,627.25	6,883.20	1,766.33	214,293.63	9,714.97	3,077.15
Tarlac	324.47	299.19	28,359.85	5,132.09	1,294.39	1,202.46
Zambales	1,967.79	2,445.58	19,000.63	1,786.92	37.75	11.64

Source: PSA as processed by EMB for Exports, BOI and PEZA for Approved Investments
Notes:

- *Specific to exports, details may not add up to totals as PH exports by region are based on the port or origin (port of loading) whereas the data by province of origin are based on where the products are originated*
- *Data by province of origin are indicative since not all exporters provide info on the origin of the products*

Total Approved Foreign Investments by Investment Promotion Agency Based in Central Luzon : 2018-2019 (in million pesos)

Agency	2018	2019
AFAB	1,673.0	340.2
CDC	2,768.4	1,257.1
CEZA	1,198.3	340.6
SBMA	803.9	2,869.3
Total	6,443.60	4,807.2

(Source :PSA)

At the height of the COVID 19, some of the export-oriented companies located in Central Luzon economic zones heeded the call of government to assist in mitigating the impact of health emergency through the increase of face mask production and supply to domestic market. Notable among these are Medtecs (Taiwanese) located in the Freeport Area of Bataan and Yokoisada (Japanese), located at the Clark Freeport Zone. Other locators such as Kinpo(Taiwanese) Mitsumi Minebea and Sankyo Denki (Japanese) repurposed a segment of their manufacturing operations to produce ventilators.

Central Luzon Investment Priority Areas

- Manufacturing & Subcontracting
- Infrastructure & Infrastructure Support Projects
- Agriculture, Agribusiness, Fishery & Forestry
- Fresh & Processed Foods
- ICT & BPO Services
- Healthcare & Wellness Products & Services
- Training & Learning Institutions
- Power Generation, especially renewable energy
- Logistics
- Waste Management Facilities
- Export-Oriented and Crafts & Products Industries
- Tourism
- Aerospace

List of Investment Priorities by Province

Province	Sector	Sub-Sector
Aurora	Tourism	• Eco-Tourism
	Trade & Industry/ Manufacturing/ Subcontracting	• Giftware and Home Decors • Wearables • Food and Food Preparations • Home and Office Furnishing • Resource-Based Commodities
	Infrastructure and Services/ Support Infrastructure Investments	• Public Utilities/ Infrastructure • Commercial Services • Power Generation • Port Development Facilities • Cold Storage Facility/ Ice Plant • Solid Waste Management Facilities

	Agriculture, Food and Forestry Based Industry	• Livestock Cattle/ Goat/ Sheep Production • Coffee Production Expansion and Processing • Poultry • Mariculture/ Aquaculture • Integrated Rice Milling • Cacao Production • Abaca Pulp Plantation and processing • Organic Farming • Industrial Tree Plantation/ Community Forest Development Project/ Forest- Based Industries • Food Processing and Packaging • Coconut Coco Coir • Coconut production
	Training and Learning Institutions	• Establishment of Technical/ Vocational School or Skills Development Centers • Establishment of Research Centers
	Strategic Activities/Project	• Special Economic Zone - Ecozone Development
Bataan	Information and Communication Technology	• BPO (Legal & financial services, manpower, call centers
	Healthcare and Wellness Products and Services	• Retirement Industry (Care Providers, Nursing Facilities, Retirement Village) • Medical Tourism (Services and Facilities) • Human Health & Wellness
	Tourism	• Tourist Accommodation and Facilities • Nature Parks & Mountain Resorts • Transportation Services • Restaurant/ Other Tourism-related Services
	Heavy Industries	• Power Plant • Oil Refinery • Oil Depot • Petrochemical Industries • Ship-building and Repair • Port Development and Operations
	Agriculture and Food Industries	• Hybrid Seed Production • Mussel-culture Industry • Mushroom-spawn Production Facility • Mobile Ice-Maker for Fishery • Corn Mechanization Center • Goat Production Facility • Food Processing • Broiler Farm Industry • Transpiration services for agri products • Moringa/ Malunggay Farm • Cassava Plantation • Coffee Processing • Bamboo Production & Propagation
	Manufacturing Industries	• Home Furnishings • Gifts and Holiday Decors
	Waste Management Facilities	• Landfill • Materials Recovery Facilities • Recycling Facilities
Bulacan	Agriculture, Food Forestry-Based Industries	• Agriculture/Agro-Forestry • Marine-Aqua Culture • Livestock and Poultry • Frozen and Processed Food • Forest-based Products

	Manufacturing Business	• Light Manufacturing Industries • Pyrotechnics
	Infrastructure and Services	• Public Utilities • Infrastructure • Tourism • Tourist Transport Facilities • Tourist Site Development
	Consumer Manufacturers/ Manufacturing	• Gifts and Housewares • Rubber Products
	Engineering Industries	• Engineering Products • Electronics Industry
	Information and Communications Technology	• IT-BPO and related industries
Nueva Ecija	Agribusiness	• Agricultural and Fishery Products • Bio Fuels, Feeds and Fertilizers • Biotechnological Products and Services
	Commercial Production	• Agricultural, Fishery and Livestock Products for commercial purposes • Mushroom production • Goat Raising • Dairy Production • Range Chicken • Organic Swine Production • Cut Flowers
	Commercial Processing	• Conversion of agricultural, fishery and livestock • products, their by-products and wastes
	Biofuels	• Production of Bio-Fuel Crops • Processing of Biomass Materials
	Feed Milling	• Processing of Agricultural, Fishery and Livestock • Products and Wastes into feeds
	Fertilizer	• Production of Organic Fertilizer
	Infrastructure	• Logistics (Post-Harvest Facilities: Establishment and Operation of Grains Drying Facilities, Cold Storage, Freezing, Bulk Handling and Storage Facilities) • Energy (Exploration or Development of Indigenous and/or Renewable Energy such as Biomass, Solar, Wind, Waste to Energy Conversion, utilization of such energy in power generation, and energy efficiency and conservation activities)
	Business Process Outsourcing (BPO)	• Voice and Non-Voice IT-Enabled Services (Procurement and Sourcing Services, Business/Knowledge Processing, Software Development, Animation, Data Transcription, • Engineering Design, and ICT Support Services)
	Forestry	• Extensive plantation of forest land of tree crops, for • commercial and industrial purposes
	Tourism	• Eco-tourism Travel, Educational, Medical, Recreational, Sports and Agro-Tourism • Retirement Industry
Pampanga	Manufacturing	• Precision Assembly • Electronics • Furniture / Furnishing • Food Processing

		• Gift and Holiday Decors • Farm Implements • Bulk Water Industry • By-Products of Quarry Materials
	Services	• Health and Wellness (Retirement Village, Spa, Medical Tourism) • Medical Services / Facilities • ICT (Financial Services, Engineering / Architectural, Call Center, Medical Transcription, Animation) • Human Resource Development: Subcontracting System (Small Brother - Big Brother Program)
	Industrial Estate	• Such as but not limited to IT Parks Development • (Pocket IEs)
	Agri-Business	• Post-Harvest Facilities • High-Value Crop Production • Feed Mills • Aquaculture • Livestock and Dairy • Marine Industry Enhancement • Bamboo Production and Processing • Moringa Production • Organic Fertilizer Production
	Eco-Tourism	• Accommodation (Hotels, Restaurants) • Nature Parks/ Mountain Resorts • Convention Centers • Theme Parks • Sports Complex
	Green Investment	• Green Technology and Engineering (i.e. Renewable • Energy)
	Waste Management Facilities	• Material Recovery and Recycling Facilities
Tarlac	Agriculture/ Agribusiness/ Organic	• Ethanol from Sugarcane for Biodiesel Processing • Cassava/ Camote Processing for Animal Feeds • Muscovado Production • Fruit and Vegetable Processing • Upland Rice Production • Mapping of Agricultural Production Areas • Production of Fragrances and Essential Oils • Organic Rice Production • Organic Banana Production
	Information and Communications Technology (ICT)	• BPO Office Space (PEZA Certification) • Talent Development: Contact Center, Knowledge Management, Data Science, Software Development, Animation, and Freelancing • Start-up Ecosystem to include Incubation Center • Expansion and Rehab of Existing Co-Working Space • Province-wide Broadband Connectivity
	Tourism	• Tourist accommodation facilities • Resorts • Retirement Villages • Medical Tourism (health care and wellness products and services) • Agri-Tourism • Eco-Tourism • Culinary Tourism • Heritage Tourism

	Light and Medium Industries	• Production/ Manufacture of export products and services
	Environment	• Reforestation • Renewable Energy
	Infrastructure	• Power and water facilities • Highways, railways, roads and bridges
	Logistics	• Special Economic Zone Development • Agro-Industrial Hub