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Global Agricultural Information Network

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Report Highlights:

Singapore is a leading market for high-value consumer-oriented products. The market is very dynamic, with interest in new products, yet also very competitive. Leading U.S. prospects are temperate fruits, dairy products, further processed meat products, prepared foods, nuts, and fruit juices.

Post:

Singapore

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Executive Summary:

Singapore is one of the world's most open economies and is highly dependent on international trade; it is the 14th largest exporter and the 15th largest importer in the world. With one of the highest per capita GDPs (\$54,713) in the world, it is also a solid market for U.S. high value products. In 2013, the U.S. exported a record \$575 million in consumer-oriented products to Singapore, with sales expected to grow another 10 percent in 2014. Leading U.S. prospects are temperate fruits, dairy products, further processed meat products, prepared foods, nuts, and fruit juices.

SECTION I. MARKET OVERVIEW

Singapore is an independent Republic with a land area of 270 square miles and a population of 5.41 million in a highly urbanized island. The resident population is 74 percent ethnic Chinese, 13.3 percent Malay, 9 percent Indian and 3.5 percent of other ethnic groups. Major languages spoken are English, Mandarin and Malay. Singapore has a low annual birth rate of less than one percent.

Strategically located in the middle of key trade flows from Asia, Australia, Europe, the Middle East and the U.S., it is one of the world's most open economies and is highly dependent on international trade. The volume of its external trade is about three and a half times its annual Gross Domestic Product.

Any decline in the economies of any of its major trading partners, i.e. the U.S., Europe, Japan and China will have an impact on the economy. Its top five trading partners are the EU, Europe, Malaysia, China, and the United States.

Singapore is on the cross-roads of major air and sea routes within the Asia Pacific region and serves as a hub and major transshipment center for much of the Southeast Asian region and the Indian subcontinent. Singapore's role in regional trade is demonstrated by the fact that re-exports comprise between 45-50 percent of total exports. It also serves as a regional food showcase and headquarters for international food and agricultural related companies.

The Market for Consumer Oriented Foods

Singapore is almost entirely dependent of imports for all of its food requirements with virtually no local agricultural production. There are no import tariffs or excise taxes for all food and beverages, except for alcoholic beverages and tobacco products. However, a Goods and Services Tax of 7 percent (GST) is levied for all goods and services at the point of distribution.

In 2013, Singapore imported \$12.18 billion of agriculture, fish and forestry products. The United States was the 5th largest supplier, accounting for \$954 million. Malaysia, France, Indonesia, and China are the other top four in descending order. The total value of imported consumer oriented foods exceeded \$6.8 billion in 2013. An additional US\$1 billion of fish and seafood products were also imported.

Major Consumer-Oriented food imports include fish and seafood, dairy products, alcoholic and non-alcoholic beverages, meat, fresh fruit and vegetables, snack foods and processed fruit and vegetables.

The U.S. is a major supplier of fresh and processed fruits and vegetables, poultry meat, dairy products, breakfast cereals, snack foods, and prepared microwaveable meals.

Competition with U.S. agricultural products comes from Australia, New Zealand, EU, Brazil, China and South Africa, who export similar consumer oriented products, including temperate fruits and vegetables, fruit juices, nuts, wines, processed packaged and canned food products, confectionery and candies, frozen poultry and frozen meats. As the market for consumer oriented products is very open and easily accessible, there is fairly quick entry for new comers. Competition in some of the consumer product categories is very intense.

The major impediments to U.S. agricultural exports are strict sanitary requirements on meat, poultry and egg imports. A good example is AVA's zero tolerance for *salmonella enteriditis* and extremely low tolerance for *staph aureus* in poultry meat to protect consumers from poor food handling and cooking practices. AVA also objects to the use of anti-microbial sprays on animal and poultry carcasses, which is a widespread practice in the United States.

Singapore exported US\$207 million of agricultural, fishery, and forestry products to the United States in 2013. At least US\$111 million were consumer oriented foods category such as fruit juices, cookies, cocoa butter, frozen seafood, food preparations, coffee, cocoa products, essential oils, prepared pineapples and spices, some of which were transshipped through, or further processed in Singapore.

Not all the imported foods are consumed locally. It is estimated that routinely, and, depending on the product category, up to 75% of food imports are re-exported mostly to neighboring countries. Major product categories include dairy products, frozen poultry and poultry parts, fresh fruit and vegetables, red meats, alcoholic and non-alcoholic beverages, snack foods and other consumer-oriented products. The growth rate for the consumer oriented foods category averaged about 5 percent per annum over the calendar period 2011-2013. The U.S. market share from 2011 to 2013 averaged 9-11 percent for the consumer oriented foods category.

Demography and Socio-economic impact

Singapore's population growth rates have been falling rapidly in the last decade as a result of the decreasing number of births by Singapore citizens. As of June 2014, the total population of 5.47 million comprised of 3.87 million citizens and permanent residents and 1.6 million non-residents. The proportion of elderly residents has increased rapidly over the last ten years. Residents aged 65 years and above comprised 11 percent of Singapore's resident population. Half of the resident population aged 25 years and over had at least post-secondary qualifications in 2013. University graduates constituted 27 per cent of the resident population in 2013, compared to 16 per cent a decade ago.

Residents with diploma and professional qualifications also accounted for a larger share at 14 per cent in 2013.

The number of singles has also risen in the country with the fall in the number of persons getting married over the last ten years. Reflecting the delay in marrying over the years, the marriage rates fell across the younger age groups below 30 years in 2013 compared to a decade ago, but rose for those aged 30 years and over. The peak age group for men marrying was 30-34 years in 2003 and 2013, compared to 25-29 years for women.

Summary of socio-economic impact of the changing demographic structure.

- Slower growth rates in domestic demand.
- Growing personal disposal income due to better-educated workforce.
- Smaller household sizes due to falling marriage and birth rates.
- Growing demand for food products for the mature age groups.
- Growth and diversity in consumer tastes with the greater increase in the number of highly educated and more traveled Singaporeans.
- The rising numbers of visitor arrivals and foreign workers in the country have contributed to a more diverse consumer base.
- More working women and single professionals has led to growth in demand for convenience foods and ready to cook prepared meals.

Advantages and Challenges for U.S. Suppliers

Advantages	Challenges
Fast growing incomes and highly educated population.	High costs of entry into major supermarket chains.
Increasing preference for higher quality products.	Lower prices of competing products from other countries.
Proliferation of western family-style restaurants and fast food chains.	Inadequate knowledge on use of U.S. products.
Large numbers of resident expatriate population familiar with western type foods.	High promotional and advertising costs for introducing new products.

SECTION II. EXPORTER BUSINESS TIPS

Local Business Practices and Custom

In the arena of international trade, Singapore business practices tend to follow those in the more developed and highly urbanized economies. The country's laws are patterned after the British legal system. There is considerable reliance on international trading practices and contracts. Letters of credit are normally used for first time transactions and only after a long history of business relationship is established, the terms of payment may be mutually adjusted to an open trading account with payment terms of up to two months. It is not uncommon for buyers to request for samples from first time suppliers. In some cases, U.S. exporters may request that buyers pay for airfreight charges and handling costs of samples if they become prohibitive.

U.S. exporters who are exporting for the first time to the Singapore market would be advised to consider making use of local distributors or at least a local representative to help them guide through the requirements of the Singapore Food regulations and local trading practices.

However, financial and credit arrangements in the domestic economy are very different. With few exceptions, supermarket chains, restaurants and other retail customers expect suppliers to provide credit terms of up to ninety days. There is also an implicit understanding to accept the return of damaged and

unsold goods. On the other hand, some small retailers like Mom and Pop stores pay cash on delivery, as their order sizes are very small. Hence, if U.S. exporters decide to carry out their own local distribution, they would have to expect to meet the usual credit terms demanded by local supermarket chains.

General Consumer Tastes and Preferences

With rising consumer incomes, Singaporeans are prepared to pay for higher quality food products or products that will provide savings in labor and time. Hence, on the supermarket shelves we tend to see an increasing number of prepared and convenience foods. Diced vegetables and seasoned portion-control meats and poultry are in increasing demand as both spouses work.

As almost all Singapore households are of Asian origin, imported foods that are to be used in local cooking have to be able to lend themselves to Asian cuisines. Asian dishes tend to be stir fried, prepared in curries or marinated in chili sauces.

Food Standards and Regulations

Singapore food laws are delineated in the Food Act and all packaged foods sold in retail outlets have to comply with the allowable ingredients and preservatives listed in the abovementioned Act (please refer to the latest GAINS FAIRS Report in the USDA website, (www.fas.usda.gov)).

Singapore has a very open import regime and all foods, with the exception of alcoholic beverages and tobacco products are imported duty-free. There are practically no non-tariff restrictions since there is very little local production and the current government policy is to source food products from all over the world. Customs clearance of imported food products is carried out electronically and the process is completed in less than 48 hours.

Import and Inspection Procedures

Export health certification is required for the import of meat, poultry products and shellfish products. In most import cases, random inspection and laboratory analysis of meat and poultry products are carried out.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Consumer-oriented Foods and Beverages & Edible Fishery Products

Singapore, which has the second highest per capita income in Asia, is one of the most open economies in the world with no tariffs on all food products except on alcoholic beverages. As a result, a wide range of food products from all over the world can be found on supermarket shelves in this compact island nation of 5.41 million people.

The major suppliers of fresh temperate climatic fruit to Singapore are the United States, Australia, New Zealand, European Union, China, South Africa, Argentina and Chile. Suppliers of tropical fruit are neighboring countries of Malaysia, Indonesia, Thailand and Vietnam. Singapore households buy mostly fresh leafy green vegetables from China, Malaysia, Indonesia, Thailand, and Vietnam. On the other hand, most of the imported temperate vegetables originating from Australia, New Zealand, European Union and the United States are supplied to restaurants and larger supermarket stores.

Singapore imports all the meats and poultry it consumes from all over the world. Poultry and pork are the main meat items consumed in Singapore. Freshly slaughtered chicken is obtained mostly by importing live poultry from Malaysia for slaughter in local abattoirs. About half of the chicken requirements are fulfilled through the imports of frozen chicken and chicken parts from Brazil, United States, China and the European Union.

Since local pig farms ceased production in April 1999, the only source of imported live pigs (about 330,000 head annually) for slaughter comes from Indonesia. Most of Singapore's pork requirements are fulfilled through the import of chilled pork from Australia and frozen pork from European Union and the United States. Beef, while not as widely consumed as chicken, is sold principally in the supermarkets. Major suppliers of beef include Australia, New Zealand, Argentina and China. The United States is allowed to supply only boneless beef from cattle less than 30 months of age because of BSE concerns.

In the seafood category, Singaporeans consume mostly fresh and frozen finfish caught and sold by neighboring countries, i.e. Malaysia, Indonesia, China and Vietnam. Other major suppliers include Norway, Thailand, Japan, Australia and India. In 2013, a total value of US\$1.1 billion of seafood was imported from worldwide sources.

Singaporeans are very fond of fresh seafood; especially fin fish, crabs, lobsters and clams. While most of the finfish are purchased in the wet markets for home consumption, Singapore consumers generally go to restaurants for the consumption of crabs and lobsters.

Food Retail Sector

The Singapore food retail industry had total revenues of \$10 billion in 2013, and it is estimated that about 50 percent of the food retail sales of \$4.5 billion take place in supermarkets, hypermarkets and modern mini marts, while the rest are sold in convenience shops, neighborhood/ traditional provision stores (Mom & Pop stores), petrol stations and wet market stalls. Traditionally Singaporeans shop for their fresh produce, meats and fish in wet market stalls. However, the trend is now changing with more households are patronizing to supermarkets for their fresh produce, meats and fish requirements. Generally, importers who represent foreign brands will be responsible for the market development of the brands, advertising and promotion and increasing distribution reach to all retailers.

Generally, the large supermarket chains and several up-market retailers import western-type products directly from source countries, consolidators and distributors for their own outlets, while smaller retailers buy from local distributors. Products imported directly include juices, jams, confectionery, biscuits, salad dressings, pre-packed deli meats and fresh temperate fruit. Products procured from local importers would include products from the Asian region, dry groceries, tropical fruit, frozen chicken and chicken parts, frozen beef, local sauces and ethnic foods.

Two major supermarket chains dominate the Singapore retail industry, Dairy Farm, and NTUC Fairprice. Dairy Farm stores target principally the middle and higher income groups, while NTUC cater to the mass-market group. NTUC Fairprice remains the leader in the industry with a market share of 32 percent.

The largest supermarket chain in terms of number of supermarket retail stores is the Dairy Farm Group with 123 supermarket stores, comprising of 47 Cold Storage supermarket retail stores, 9 premier Market Place stores, 4 Specialty stores and 62 Giant Stores (previously called Shop & Save). A large

percentage of products on their shelves are western-type products from the EU, Australia, New Zealand and the United States. Nine of their outlets are located in upper middle-income residential areas and customers to these outlets are principally expatriates and upper middle-income residents. In addition, the Dairy Farm Group operates the 7-Eleven Convenience Chain of 530 stores and 128 Guardian Pharmacy outlets.

The second largest, is the NTUC Fairprice supermarket chain with a network comprising 97 Fairprice supermarkets, 16 Fairprice Finest stores and 7 Fairprice Xtra (Hypermarkets). In addition, the group has 160 Cheers Convenience Stores and 20 Fairprice Convenience Stores some of which are located in Esso-Mobil Stations. NTUC Fairprice's target audience is principally the middle and lower income groups. Competitive pricing is one of the main factors determining whether a new product should be procured for the NTUC Fairprice stores. The NTUC Fairprice chain is the most extensive in terms of consumer reach, geographically and across all income segments. Fair price stores are located in almost every large residential population concentration. Importers who require their products to be distributed island-wide and with the focus on the mass market prefer to work with NTUC Fairprice.

NTUC Fairprice supermarket chain procures their food products from consolidators, distributors local importers. The company has also embarked since 1985 on extensive house branding of basic essentials like confectionery, rice, bread, sauces, cooking oil, toilet paper, tissue paper, sugar, detergents, canned fruits and vegetables, etc. The items are, on average, priced 10 to 15 per cent lower than comparable products. In July 2008, "Pasar Organic" was added to the range, offering organic produce at affordable prices.

There are several independently managed supermarkets such as Isetan, Meidi-Ya, Mustafa's, and Prime Supermarket. The most recently established supermarket chain, Sheng Siong which has 33 small and medium sized stores and Prime Supermarket with 19 outlets are family-owned business entities which originated from small single grocery outlets to their current sizes today. Both Sheng Siong and Prime are very price competitive as they procure most of their products from China and other neighboring low cost Asian supplier countries. Customers of both supermarket chains come mostly from the lower middle-income groups. The rest of the above mentioned supermarkets are independently operated supermarket stores with only one outlet each. Isetan and Meidi-Ya target principally the upper middle-income groups and the Japanese community in Singapore.

Food Service Sector

The Singaporean foodservice market has witnessed steady growth mainly due to a steady domestic economy, rise in tourism and demographic changes. Restaurant sales reported an increase of 10 percent for 2013 due to the greater influx of tourists and business arrivals. The key drivers of the foodservice industry are growth in tourism, a stable economic environment, increases in the female working population and a low level of inflation. The opening of two integrated resorts; Marina Bay Sands and Resorts World Singapore and new leisure facilities; Garden by the Bay and Marine Life Park, and shopping malls provided opportunities for further expansion by existing players and allowing new entrants into the market.

Singaporeans spend about US\$5.7 billion annually eating out. Restaurants as a group account for 37 percent, while fast food outlets account for 13 percent of the total revenue in the food & beverage services industry. Food caterers take up a 12 percent share of the food and beverage industry. The Others Category consisting of cafes, coffee houses, food courts, coffee shops and eating houses take up 38 percent of the total. Since eating out in the numerous cooked food stalls located round every corner

of major housing residential estates is relatively inexpensive, most Singaporeans eat out at least once a day. A Department of Statistics survey found that an average monthly household of US\$213 was spent at dining-in restaurants, cafés and pubs. As most households have working wives, Singapore families find it more convenient and, in most cases, less expensive to eat out. It is not uncommon each evening to see families walk to the nearest neighborhood cooked-food stall to have their dinner.

About 5,500 cooked food stall outlets exist on the island. Besides these cooked-food stalls, fast food chains like McDonalds, Kentucky Fried Chicken, Burger King, Pizza Hut, Swensen's are located in large shopping malls across the island.

Food service companies in Singapore are widening their distribution network to other countries in the Asian region to achieve economies of scale in operation. As individual restaurant requirements are small, Singapore food service companies provide an alternative supply chain to customers who have small but frequent procurement needs for U.S. or western-type products.

A number of well-known U.S. brands are being transshipped or distributed from Singapore. Singapore Importers/Traders are able to provide credit terms to their counterparts in the region or to carry out specific handling, packaging or documentation requirements. Generally, products which have a longer shelf life and which do not need refrigeration are more easily transshipped.

Meat and poultry products, which require halal certification for Muslim consumers in the region, are generally shipped direct to the country of destination. Again, some Singapore traders may be involved in the procurement process as well as in the provision of short-term credit to the local importers in the destination country.

Food Processing Sector

Singapore's food processing sector is made up of 750 companies, dominated by mainly small and medium enterprises. These companies span 17 sub-sectors, ranging from flavors, sauces, ready meals, noodles, deli meats, sausage making, confectionery, chocolates, snack foods to beverages. Some of the food manufacturers are keen to venture overseas and many have gained footholds in various parts of the countries, including the ASEAN region and in the Middle East and Russia.

Singapore food manufacturers are keen to invest in R&D to cater to wider consumer bases through improved packaging, and product shelf life, as well as adherence to strict food safety standards. Many are certified to international food safety standards as the Hazard Analysis and Critical Control Points (HACCP), ISO 22000 and BRC which help them gain a competitive edge in the global marketplace.

Practically all food ingredients for manufacturing are imported from a wide range of countries worldwide since Singapore has no crop or livestock production.

Singapore's total food export (coffee, tea, cocoa, spices and manufactures; fish, seafood preps; beverages and tobacco and manufactures)

The total output of the locally manufactured food, beverage and tobacco sector was valued at around US\$7 billion in 2013, out of which it was estimated that over half was re-exported. Products, which are exported, include beer, soft drinks, edible oils, chocolates, processed seafood, milk powder, condensed milk, sauces and spices.

The source of competition is dependent upon the nature of the product manufactured. For example, Australia and New Zealand supplies most of the milk products and dairy ingredients while China

supplies most of the corn and soybean products. Malaysia supplied nearly 20 percent of the food ingredient market and is the major supplier of live poultry for slaughter, edible oils, tropical fruit and vegetables. The U.S. has significant market share in juices, juice concentrates, frozen poultry parts, fresh temperate fruit, nuts, flavorings, spices and leaf tobacco.

SECTION IV. BEST HIGH –VALUE PRODUCT PROSPECTS

Product Category	2013 Total Imports US\$ Million	2009-2011 Ave Annual Growth (%)	Key Constraints over Market Development	Market Attractiveness for USA
Snack Foods	389	11	Intense Competition from lower cost suppliers from neighboring ASEAN region, China, EU and Australia	Availability of wide variety of flavors. Quality of U.S. products and packaging.
Fruits & Vegetable Juices	81	16	Lower priced fruit & vegetables juices from Indonesia, Malaysia, Thailand, Brazil and China.	Quality and instant brand recognition of leading U.S. brands
Fresh Fruit	486	10	Intense competition from China, South Africa, Australia and New Zealand	U.S. has reputation of being a supplier of quality fresh fruits
Tree Nuts	121	31	Competition from low priced peanuts from China and pistachios from Iran	Quality of products from U.S. are consistently maintained
Fresh Vegetables	436	10	Strong competition from Malaysia, China, Indonesia , Thailand, Australia and India	U.S. has a reputation for quality products and instant brand recognition
Pet Foods	33	10	The market for pet foods is keenly contested. Australian brands are well established and have a closely geographical advantage	U.S. brands have a high brand recognition and there is a natural reluctance to carry out brand switching for marginal price differences

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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APPENDIX I. STATISTICS

A. Key Trade & Demographic Information

	2013	
Agricultural Imports From All Countries (\$Mil) /U.S. Market Share (%)	12,184	8%

Consumer Food Imports From All Countries (\$Mil) /U.S. Market Share (%)	6805	11%
Edible Fishery Imports From All Countries (\$Mil) /U.S. Market Share (%)	1009	2%
Total Population (Millions) /Annual Growth Rate (%)	5.31	2.5
Urban Population (Millions) / Annual Growth Rate (%)	NA.	N.A.
Number of Major Metropolitan Areas	1	
Size of the Middle Class (Millions) /Growth Rate (%)	N.A.	N.A.
Per Capita Gross Domestic Product (U.S. Dollars) / Increase over previous year	54,713	3.9
Unemployment Rate (%)	2.2	
Per Household Food Expenditure (U.S. Dollars) Per Annum	11300	
Exchange Rate in 2013 (US\$1 = S\$1.25)		

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCTS IMPORTS

Singapore Imports (In Millions of Dollars)	Imports from the World			Imports from U.S.			U.S. Market Share (%)		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
CONSUMER-ORIENTED AG TOTAL	6086	6162	6805	587	675	746	9	11	11
Snack Foods (Excluding Nuts)	341	366	389	32	37	37	8	16	16
Breakfast Cereals, Pancake Mix	32	33	37	8	9	9	24	26	24
Red Meats, Fresh/Chilled/Frozen	503	520	520	41	39	51	8	8	10
Red Meats, Prepared & Preserved	166	178	186	18	21	21	11	12	11

Poultry Meat	270	274	280	64	54	40	24	20	14
Dairy Products (Excluding Cheese)	976	885	1049	60	61	55	6	7	5
Cheese	78	81	87	7	6	8	8	8	9
Eggs & Products	127	116	130	2	2	3	2	2	2
Fresh Fruit	413	439	486	83	83	90	20	19	18
Fresh Vegetables	366	394	436	16	19	19	4	5	4
Processed Fruit & Vegetable	311	331	365	60	67	77	19	20	21
Fruit & Vegetable Juice	61	74	81	12	15	14	19	20	18
Tree Nuts	159	131	121	12	13	18	7	10	15
Wine & Beer	615	621	729	12	15	20	2	2	3
Nursery Products & Cut Flowers	93	82	87	2	1	1	2	1	1
Pet Foods (dogs & Cat Food)	26	30	33	8	9	10	31	29	30
Other Consumer-Oriented Products	1548	1606	1791	152	223	274	10	14	15
FISH & SEAFOOD PRODUCTS	1094	1006	1009	27	22	19	2	2	2
Salmon	50	49	68	0	0	0	0	0	0
Surimi	0	0	0	0	0	0	0	0	0
Crustaceans	330	323	372	11	10	10	3	3	2
Ground fish & Flatfish	34	42	29	0	2	3	1	5	10
Molluscs	120	107	106	5	5	4	4	4	4
Other Fishery Products	560	484	434	11	5	3	2	1	1
AGRICULTURAL PRODUCTS TOTAL	10368	10274	10428	705	803	915	7	8	9
AGRICULTURAL, FISH & FORESTRY TOTAL	12121	12036	12184	746	849	954	6	7	8

Source: Global Trade Atlas (GTA)

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

Consumer Oriented Agricultural Imports (In US\$ Million)

Rank	Partner Country	United States Dollars		
		2011	2012	2013
1	Malaysia	998	1,025	1,121

2	United States	587	675	746
3	Australia	644	628	614
4	China	470	466	509
5	France	464	451	506
6	New Zealand	442	398	492
7	Brazil	319	340	378
8	Thailand	286	286	315
9	Indonesia	322	296	299
10	Netherlands	169	196	216
11	Vietnam	70	101	166
12	Germany	101	109	125
13	India	105	97	120
14	Japan	101	120	117
15	Italy	85	93	101
	Others	924	884	981
	Total	6,086	6,162	6,805

Source: Global Trade Atlas (GTA)

END OF REPORT.