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Required Report - public distribution

Date: 11/1/2017

GAIN Report Number: SN7012

Singapore

Food Service - Hotel Restaurant Institutional

Annual 2017

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Report Highlights:

Singapore has a vibrant, highly dynamic and competitive Hotel, Restaurant, and Institutional (HRI) sector. Strong demand by business travelers and rising number of tourists drive the HRI sector offering opportunities for U.S. exporters. This sector serviced some 5.5 million residents and 16.4 million tourists and business visitors in 2016. Tourist receipts totaled \$18.2 billion, of which \$2.06 billion were for food and beverage. Leading HRI prospects include U.S. seafood, prime beef cuts, dairy and specialty fruits and wines.

Post:

Singapore

Table of Contents

| | |
|--|----|
| SECTION I. MARKET SUMMARY | 3 |
| SECTION II. ROAD MAP FOR MARKET ENTRY | 10 |
| SECTION III: COMPETITION | 25 |
| SECTION IV: BEST PRODUCT PROSPECTS | 25 |
| APPENDIX: POST CONTACT AND FURTHER INFORMATION | 29 |

SECTION I. MARKET SUMMARY

1. Singapore in overview

Singapore, with a population of 5.6 million, is a fairly wealthy country and a highly developed market economy as a highly urbanized island. Singapore is one of the most advanced consumer markets among the ten Association of Southeast Asian Nations (ASEAN)* member countries. The structure of the resident population is diverse and ranges from lower income group Singaporeans living in government subsidized apartments locally known as “Housing Development Board” (HDB) to wealthy Singaporeans and to the higher income group expatriates. This situation underpins a Hotel, Restaurant, Institutional (HRI) food service sector that ranges from basic cooked food stalls/casual street stalls operating in local food centers located in residential heartlands to fine dining/super-premium restaurants operating at a single site outlet and located in 4, 5, 6-star hotels and retail shopping malls, local-owned including those by foreign celebrity chefs. Between these two types of operations are a sizeable mid-range group of fast food, Quick Service Restaurant (QSR), casual dining and air-conditioned food courts in shopping malls and Full Service Restaurant (FSR).

Singapore, ranked as the world’s number one in terms of ease of doing business, is almost entirely dependent upon imports for all of its food requirements with virtually no local agricultural production. It has a very small food processing industry, and its market is a captive market for a wide range of food and drinks used in its HRI/food service channels. It imports almost 90 percent of its food requirement, with no import tariffs or excise taxes for all food and beverages (except for alcoholic beverages and tobacco products), but a Goods and Services Tax (GST) of 7 percent is levied for all goods and services at the point of distribution. This situation provides U.S. products with opportunities in a diverse range of channels, e.g., U.S. frozen chicken parts demanded by lower end cooked food stall operators as well as U.S. premium seafood demanded by 5-star hotels and seafood restaurants.

**a political and economic organization of ten [Southeast Asian](#) countries formed on 8 August 1967, member countries include Brunei, Cambodia, [Indonesia](#), Laos, [Malaysia](#), Myanmar (Burma) the [Philippines](#), [Singapore](#), [Thailand](#), and [Vietnam](#)*

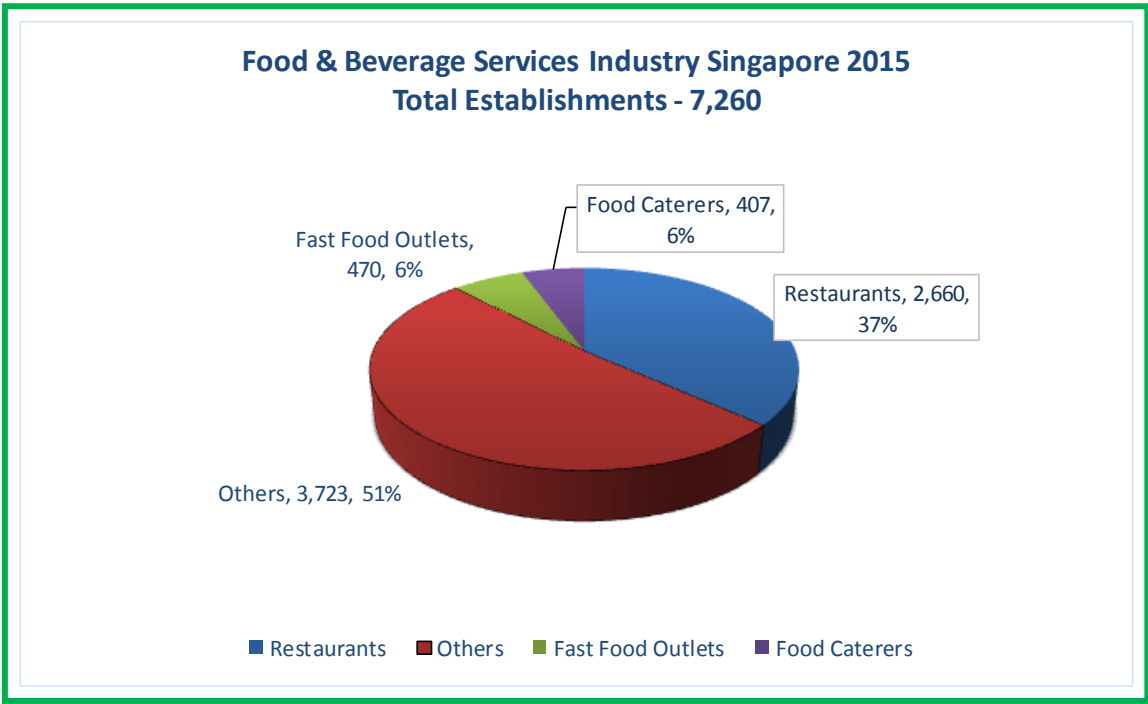
2. The food service market

The consumer food service sector in Singapore was valued at US\$6 billion in 2016. Singaporeans and expatriates can often eat in a wide range of different food service outlets during the day (some food stalls/coffee shops are open through the night), for example, at a local coffee shop in the morning, a food court at lunch time and/or restaurant or casual dining at night. In any one day, consumers can eat a Malay breakfast, Chinese lunch and an American dinner. Between meals could be coffee from *Starbucks* or local chained coffee outlet such as *Toast Box*, or *YaKun* or *Wang*, or a bowl of local noodles from a cooked food stall in food courts/food centers in shopping malls located in suburbs or “heartlands” where residents live.

Singaporeans were Asia’s top spenders on dining, the average Singaporean spends US\$200 a month on eating out at hawker centers, restaurants, and cafés. Food courts are the most popular as they are found all over the island, with at least one in every mall and several in and around housing estates. On average, in a month, customers patronize food courts 15 times, quick-serve restaurants 7 times and fine dining restaurants 2 to 3 times.

Singaporeans spend more on dining out because of their busier lifestyles, increase in dining options, and word-of-mouth recommendations via social media. On average, consumers can buy a decent meal

including drinks for around US\$5-US\$8 when dining at food courts. Singaporeans like good bargains, with 34% booking dining deals on coupon sites or via mobile phone apps, and 51% checking out credit card promotions. When deciding on a dining venue, 52% checks online reviews of eateries and 46% seeks recommendations from families, friends or colleagues. If a meal or dish comes highly recommended, Singaporeans are willing to travel across the island to sample the food.



3. The HRI sector

Singapore’s HRI industry is extremely competitive with the number of food service outlets and sales growing about 3 and 4% respectively. The HRI sector services about 5.6 million residents and 16 million tourists and business visitors per annum. Within the resident population of 3.9 million are a sizable number of expatriate families and Chinese comprise 74.3% of the total population. Tourists stayed in Singapore for an average of around 3.4 days per visit in 2016, and about 60% of these persons stayed in a hotel. Tourism receipts from food and beverage totaled 2.06 billion in 2016.

In 2015, there were about 7,260 establishments in the food & beverage (F&B) services industry. Operating receipts in the F&B services industry totaled US\$6,642. Restaurants and fast food outlets recorded increases in operating surplus while food caterers and other F&B services reported declines in 2015. Restaurants were the largest contributor in terms of value added, accounting for 38% of the industry’s total value added in 2015.

Singapore’s HRI industry is highly competitive with the number of food service outlets and sales growing about 3 and 4% respectively. The top 3 business costs, i.e. purchases of raw materials, remuneration and rentals of premises accounted for almost 80% of total business costs.

Key Trends/Developments in the HRI Sector:

- **Changing Food Landscape.** Food Landscape is changing as a result of the introduction and preference of more foreign foods. The restaurant scene is getting more vibrant. As of 2016, Singapore is the first Southeast Asian country, or the fourth Asian territory, after Japan, Hong Kong and Macau to be rated by the Michelin Guide long regarded as the world's foremost authority of culinary merit. The influential guide, *Michelin Guide* in Singapore 2016 (<https://guide.michelin.sg/2016-michelin-guide-singapore-launches>) is expected to boost patronage for the 200 recognized players in more than 35 different cuisine categories and food establishments.
Opening of New Age Food Courts. Competition in the food courts scene is getting stiff, and to differentiate from the masses, recently opened food courts offer gourmet choices, and/or “theme” or “cuisine-specific” offering a more unique dining experience.
- **Stable Growth.** There was stable growth in the food service industry in 2016. In Singapore, eating out is common due availability of hawker centers, food courts, coffee shops and casual dining places which provide many local dishes at affordable prices. Singaporeans are clocking more work hours and less time is spent cooking, which means opting for “meals to go” and or meals at casual dining cafes, food courts or opting for fast food.
- **In terms of full-service restaurants, local foodservice operators take the lead.** Compared to international players, major local players, *Crystal Jade* and *Tung Lok Restaurants* rank tops in full-service restaurants in 2016 with their interesting cuisines and concepts. However, consumers tend to have the perception that dining out in full-service restaurants is expensive and usually reserved for special occasions such as birthdays, anniversaries, and family gatherings.
- **Franchising – Local/Asian and Foreign.** Franchise type with casual dining chains and fast food chains is prevalent and popular in Singapore, for example, ABR Holdings Ltd which is the franchisee of *Swensen's*. In 2016, McDonald's sold franchise rights in Singapore and Malaysia to *Saudia's Group, Lionhorn Pte. Ltd.*, which is currently the franchisee for *McDonald's* in Western and Southeast Regions of Saudi Arabia.

Korean cuisine are getting even more attention and are finding successes with consumers here because of the influence by K-pop and K-dramas. More and more Korean eateries are springing up in malls and food courts. Korean fried chicken franchises such as *Bonchon*, and *Chir Chir* can be found here; as well as desserts such as *Bingsus* (shaved ice with toppings), Churros are gaining popularity.

- **Retailers Investment in Consumer Foodservice.** Malls such as *Wisma Atria* (Orchard Road), *Emporium Shokuhin* (Marina Square), *Suntec City* (Marina) with dedicated sections offering Japanese dining options to woo more customers to shop and dine at the malls. This concept is provided stronger branding and greater business synergy through collaboration rather than operating as a standalone restaurant.
Retailers such as *Muji* and *Marks & Spencer* have food and beverage cafés within their stores to

encourage more shoppers to linger.

- **Increased Operating Costs and Growing Manpower Crunch.** The industry continues to struggle with a growing manpower crunch and rising rental costs. There is a high turnover in the sector and dependence on foreign labor.
- **Food Technology.** Players are making greater use of technology, for example, iPads are used for displaying menus and ordering, to lighten manpower requirements. Self-ordering kiosks/stations have become more common and adopted by fast food chains such as *McDonald's* and *Popeyes*'. Smart robots are used in local "*Koufu*" food court to collect food trays from humans (Singaporeans aren't in the habit of returning trays).
- **Increased Interest in Healthier Meals.** The local health authorities': Healthy Dining Program has spurred consumers' interest to eat healthier meals, which in turn encourage players to offer more healthy options on their menus.
- **Thirty party delivery service.** Singaporeans are the most tech savvy, and has become the most suitable test pad for new innovations and services in Asia Pacific. The market value of food delivery industry in Singapore was US\$61 million in 2016, or in per capita terms, Singaporeans spent US\$22 on food delivery, and the value is set to increase in the next few years as eating is a national pastime. The option of food delivery appeals to busy employees.

Food Panda, and *Deliveroo* are the most popular players in food delivery. *Food Panda* offers consumers the convenience of on-demand delivery with choices from fast food, fast casual restaurants such as *Burger King*, *Yoshinoya* (Japanese), *Carl's Jr.*, *Swensens* and *The Manhattan Fish Market*. *Deliveroo* and *UberEats*, are recent entrants with a different positioning, providing delivery service for restaurants and cafés. A latest entrant on food delivery scene is *PorterFetch* that delivers to night owls from 9.00 p.m. to 1.00 a.m.

Food delivery provides an extra avenue for players to sell and reach out to consumers. Although there is still room for growth in the food delivery industry, new business models and partnerships and differentiation should be adopted in order to stay ahead of the competition.

- **Singapore Government's 23 Industry-Specific Roadmaps for the Future.** The consumer foodservice industry has been identified as one of 23 roadmaps and is the first to be rolled out in 2016. The Singapore Government aims to achieve an annual productivity growth target of 2% for the consumer foodservice industry without any staff increase over the next five years through adoption of technology in the restaurant area, digital kiosks and iPad ordering. SPRING Singapore, an agency under the Ministry of Trade and Industry has been tasked to help Singaporean enterprises grow. Companies will be provided grant support through 2018 for adopting digital services solutions.

Market Data

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2011-2016

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|-----------------------------|----------|----------|----------|----------|----------|----------|
| Units | 26,774.0 | 26,808.0 | 27,100.0 | 27,375.0 | 27,722.0 | 27,954.0 |
| Transactions (million) | 646.7 | 660.7 | 678.2 | 680.7 | 687.5 | 700.0 |
| USD billion current prices | 5.4 | 5.6 | 5.7 | 5.9 | 5.9 | 5.6 |
| USD billion constant prices | 5.4 | 5.3 | 5.4 | 5.5 | 5.5 | 5.6 |

Table 2 - Consumer Foodservice by Independent vs Chained: Units/Outlets 2016

| Outlets | Independent | Chained | Total |
|------------------------------|-------------|---------|----------|
| 100% Home Delivery/Takeaway | 19.0 | 170.0 | 189.0 |
| Cafés/Bars | 1,682.0 | 581.0 | 2,263.0 |
| Full-Service Restaurants | 1,268.0 | 527.0 | 1,795.0 |
| Fast Food | 40.0 | 1,495.0 | 1,535.0 |
| Self-Service Cafeterias | - | 5.0 | 5.0 |
| Street Stalls/Kiosks | 20,154.0 | 2,013.0 | 22,167.0 |
| Pizza Consumer Foodservice | 41.0 | 171.0 | 212.0 |
| Consumer Foodservice by Type | 23,163.0 | 4,791.0 | 27,954.0 |

**Table 3 - Global Brand Name Brand Shares in Chained Consumer Foodservice:
% Foodservice Value 2012-2016**

| % value | Global Brand Owner | 2013 | 2014 | 2015 | 2016 |
|-----------------------------|--|------|------|------|------|
| McDonald's | McDonald's Corp | 16.8 | 16.3 | 16.4 | 16.3 |
| KFC | Yum! Brands Inc | 5.7 | 5.9 | 6.0 | 6.1 |
| Din Tai Fung | Fairy Rise Development Ltd | 2.3 | 2.8 | 2.9 | 3.3 |
| Subway | Doctor's Associates Inc | 2.6 | 2.7 | 2.7 | 2.8 |
| Starbucks | Starbucks Corp | 2.1 | 2.1 | 2.4 | 2.7 |
| 7-Eleven | Seven & I Holdings Co Ltd | 3.0 | 2.6 | 2.5 | 2.5 |
| Pizza Hut | Yum! Brands Inc | 2.6 | 2.6 | 2.5 | 2.5 |
| Coffee Bean & Tea Leaf, The | International Coffee & Tea LLC | 1.6 | 1.7 | 1.8 | 2.1 |
| Tung Lok Restaurants | Tung Lok Restaurants (2000) Ltd | 2.0 | 2.0 | 2.0 | 2.0 |
| Crystal Jade | Crystal Jade Culinary Concepts Holding | 2.6 | 2.5 | 2.2 | 1.9 |
| Old Chang Kee | Ten & Han Trading Pte Ltd | 1.7 | 1.7 | 1.8 | 1.8 |
| Burger King | Restaurant Brands International Inc | - | 1.7 | 1.6 | 1.7 |
| Sakae Sushi | Sakae Holdings | 2.0 | 1.9 | 1.5 | 1.4 |
| Soup Restaurant | Soup Restaurant Group Ltd | 1.2 | 1.2 | 1.2 | 1.2 |
| Swensen's | CoolBrands International Inc | 1.1 | 1.2 | 1.2 | 1.2 |
| ThaiExpress | Minor International PCL | 1.3 | 1.2 | 1.2 | 1.2 |

| | | | | | |
|-------------------------|-----------------------------------|-------|-------|-------|-------|
| Pastamania | PastaMatrix International Pte Ltd | 1.2 | 1.1 | 1.0 | 0.9 |
| Xin Wang Hong Kong Café | Minor International PCL | 0.7 | 0.8 | 0.9 | 0.9 |
| Toast Box | BreadTalk Group Ltd | 0.8 | 0.8 | 0.9 | 0.9 |
| Fish & Co | OB Singapore Operations Pte Ltd | 1.2 | 1.0 | 0.9 | 0.8 |
| Ajisen Ramen | Shigemitsu Industry Co Ltd | 1.1 | 1.1 | 1.0 | 0.8 |
| McCafé | McDonald's Corp | 0.9 | 0.9 | 0.9 | 0.8 |
| Harry's Bar | Harry's International Ptd Ltd | 0.8 | 0.7 | 0.7 | 0.8 |
| Mr Bean | Super Bean International Pte Ltd | 0.8 | 0.7 | 0.7 | 0.7 |
| Ikea Restaurant | Inter Ikea Systems BV | 0.7 | 0.7 | 0.7 | 0.7 |
| Coffee Connoisseur, The | Sarika Coffee Co (S) Pte Ltd | 1.2 | 1.0 | 0.8 | 0.7 |
| Dian Xiao Er | YES F&B Group Pte Ltd | 0.8 | 0.8 | 0.8 | 0.7 |
| Domino's Pizza | Domino's Pizza Inc | 0.4 | 0.5 | 0.6 | 0.7 |
| Long John Silver's | LJS Partners LLC | 0.8 | 0.8 | 0.7 | 0.6 |
| Umi Sushi | Neo Group Ltd | 0.5 | 0.6 | 0.6 | 0.6 |
| Burger King | Burger King Worldwide Inc | 1.7 | - | - | - |
| Others | Others | 37.8 | 38.5 | 38.7 | 38.7 |
| Total | Total | 100.0 | 100.0 | 100.0 | 100.0 |

(Source: Euromonitor)

Table 4 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2016

| | Global Brand Owner | outlets |
|-----------------------------|-------------------------------------|---------|
| 7-Eleven | Seven & I Holdings Co Ltd | 546.0 |
| McDonald's | McDonald's Corp | 130.0 |
| Cheers | NTUC FairPrice Co-operative Pte Ltd | 129.0 |
| Starbucks | Starbucks Corp | 129.0 |
| Subway | Doctor's Associates Inc | 112.0 |
| KFC | Yum! Brands Inc | 88.0 |
| Old Chang Kee | Ten & Han Trading Pte Ltd | 76.0 |
| Toast Box | BreadTalk Group Ltd | 70.0 |
| Pizza Hut | Yum! Brands Inc | 66.0 |
| Coffee Bean & Tea Leaf, The | International Coffee & Tea LLC | 62.0 |

| | | |
|-------------------------|--|---------|
| Mr Bean | Super Bean International Pte Ltd | 53.0 |
| Ya Kun Kaya Toast | Ya Kun International Pte Ltd | 53.0 |
| McCafé | McDonald's Corp | 51.0 |
| Choices | Singapore Petroleum Co Ltd | 41.0 |
| Burger King | Restaurant Brands International Inc | 36.0 |
| Pezzo | Pezzo Ptd Ltd | 32.0 |
| MOS Burger | MOS Food Services Inc | 30.0 |
| Canadian 2 for 1 Pizza | Hobbs Holdings Pte Ltd | 28.0 |
| Jollibean | Jollibean Foods Pte Ltd | 28.0 |
| ThaiExpress | Minor International PCL | 28.0 |
| The Soup Spoon | Soup Spoon, The | 28.0 |
| Sakae Sushi | Sakae Holdings | 27.0 |
| Swensen's | CoolBrands International Inc | 26.0 |
| Killiney Kopitiam | Killiney Kopitiam Pte Ltd | 26.0 |
| Pastamania | PastaMatrix International Pte Ltd | 26.0 |
| Tung Lok Restaurants | Tung Lok Restaurants (2000) Ltd | 26.0 |
| Crystal Jade | Crystal Jade Culinary Concepts Holding | 24.0 |
| Domino's Pizza | Domino's Pizza Inc | 23.0 |
| FairPrice Xpress | NTUC FairPrice Co-operative Pte Ltd | 23.0 |
| Xin Wang Hong Kong Café | Minor International PCL | 22.0 |
| Others | Others | 2,752.0 |
| Total | Total | 4,791.0 |

(Source: Euromonitor)

Advantages and challenges for the USA and its exporters of products targeted at the food service industry

Singapore importers are generally experienced and knowledgeable about the food service industry. They know where/which supplier countries to source appropriately from, for example, meat and poultry, fish and seafood, fruits, vegetables, dairy products, beverages, etc. For this reason, U.S. products offered in Singapore will generally have to be well differentiated, if they are to be successful. Unfortunately, “well differentiated” often means lower priced and of reasonable good quality.

American products will come up against lower cost acceptable products from countries such as China, Brazil, Argentina, South Africa, etc., as well as Australian products that have a freight cost advantage over competing U.S. products.

| Advantages | Challenges |
|---|--|
| <ul style="list-style-type: none"> U.S. products are known to be high quality, healthier and consistently available. | <ul style="list-style-type: none"> Imported/U.S. products are generally more expensive. |

| | |
|--|--|
| <ul style="list-style-type: none"> • Growing popularity of convenience and fast foods – especially U.S. fast foods - favors use of these chains’ existing procurement systems which source food ingredients from the States. • Singapore is a major importer of food products; in fact, 90% of its foods are imported from 160 countries including beef, dairy products, fresh fruits and vegetables. • International restaurants, cafés, fast food outlets and hotel chains are increasing. • Singapore’s HRI sector is dynamic, thriving and expected to continue to grow. • Singapore is one of the wealthiest markets in the region and has one of the most liberal markets in the world. | <ul style="list-style-type: none"> • There is a rising trend in Singapore on eating “healthier” food. Fast food is often associated with eating extra calories (contains higher fat, sugar and salt content) and are considered as “junk” food. • Competition remains strong, especially from “traditional” food supplying countries of Australia, New Zealand, China, Malaysia and other regional countries. They are also generally cheaper than U.S. products. • Scarce labor and also difficult/expensive to hire workers from neighboring countries due to government’s policy on foreign workers. • Labor and promotional/marketing costs are generally more expensive than regional countries. Also, the HRI sector is relatively fragmented. • Concerns about developing crisis/economy slowdowns in Europe/China and negative impact on Singapore’s economy. |
|--|--|

SECTION II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

The United States generally has a good image as a supplier of food and drinks in Singapore with a few exceptions for importers. Some importers comment that selected U.S. exporters are inflexible, short sighted and have problems in their product and packaging portfolio, as compared to local demand traits. This situation exists because many U.S. exporters tend to assume that the Singapore market and supply chain operates in a similar manner to that in the United States.

As there are often similar types of product competing for the same segment, U.S. exporters have to take into account what Singaporean importers are interested in and its adaptability in local/international cuisines, which include the following points:

- Unique products or functionality (now including convenience aspects) that are interesting to

buyers and end users;

- Specialty products that can attract a higher margin;
- Good brands, i.e. usually the No. 1 to 3 in their home market;
- International quality products that stand up to competition from Europe, Australia and New Zealand, which set the benchmarks in many food service supply market segments.
- Participative exporters who will support their products in the market, i.e., on-going funding for relevant marketing activities and or buyers mission through cooperative activity between exporter and importer.
- Exporters who can routinely deal with Singapore-sized orders and packaging sizes, and are flexible.
- Exporters that do not have short term objectives and weak commitments, but can take a longer term view of the market conditions for their brands, which can be difficult in the short term.
- Exporters that are well researched and do not make incorrect assumptions about their market opportunities.
- Appropriate sized packaging

It should also be noted that halal-certified foods, ingredients and inputs are also becoming more and more important in Singapore's food service/HRI supplies market. Most of the fast food and Quick Service Restaurant (QSR) chains are halal-certified.

This trend applies to Singapore's hotels. The number of Muslim tourists and business visitors arriving from Indonesia, Malaysia, the Indian sub-continent, the Middle East and China, indicate that between 20% and 25% of Singapore's foreign visitor arrivals are now Muslims. Indonesia, the World's most populous country and a close neighbor of Singapore, has become more affluent over the past 5 years.

B. MARKET STRUCTURE

- Singapore is an open, yet competitive market with importers looking to the entire world for supplies. There are a number of factors that constrain U.S. products, including the strategies of U.S. multi-national food and drink brands, the strategies of the international/U.S. fast food companies, competition from old and new sources, and the longstanding price sensitivity that is embedded in the Singapore market.
- Many U.S. and other multi-national brands in Singapore's mid-range market are sourced locally or from within the East Asia and Oceania region, with ASEAN-based production facilities becoming more important as the FTA's have developed across the region. This situation has arisen from corporate strategies that have been implemented throughout the region to produce

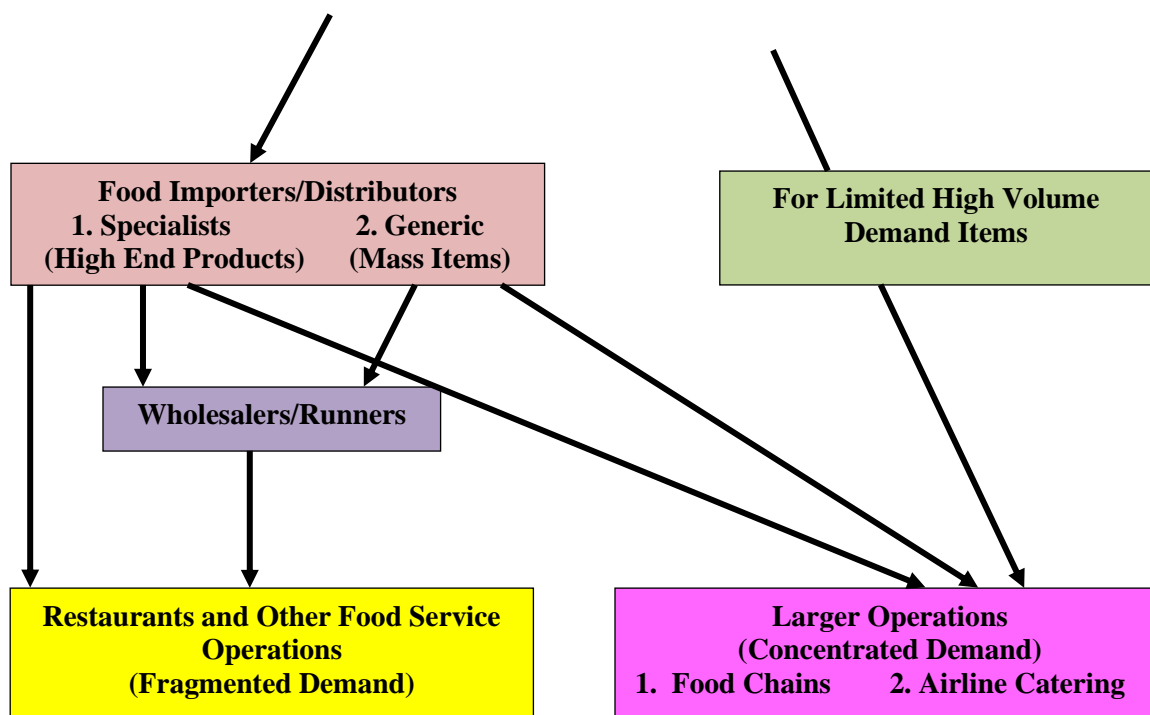
locally for the regional market.

- Additionally, international fast food companies are no longer importing much in the way of U.S. products for use by their operations. This arises because new sources have developed in East Asia, and because of new licensing agreements. The latest products to switch are frozen potato products, now entering the Singapore market from China.
- Classic cases of these strategies exist within *Coca-Cola*, the *Pepsico* group, and in the supply chain of *McDonald's* and *Yum!* Brands. They are also reflected in the business strategies of smaller companies, including the U.S. linked ice cream companies, such as *Swensen's*. Other companies, such as *Simplot*, are also changing export patterns out of the United States to Singapore with their investments in frozen vegetable plants in China.
- The major impediments to U.S. agricultural exports are strict sanitary requirements for meat, poultry and egg imports. A good example is Singapore's regulatory body, Agri-Food and Veterinary Authority's (AVA) 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 approves only a fraction of anti-microbial sprays on animal and poultry carcasses used in the United States.



Japan-themed restaurants (left) and Soup Spoon and Krispy Kreme (right) outlets.
(Source: FAS Singapore)

Distribution of Food Service/HRI Industry Supplies in Singapore



- The bulk of food service businesses in Singapore do not procure directly from overseas suppliers because the size of businesses is small. Trade sources advise that some of the more sizeable operations, for example, the airline caterers (which tender their supplies), do have limited demand for certain higher volume products on a direct basis, for example, wine.
- The other businesses that do procure on a direct basis are the major fast food chains that are procured through a regional or corporate purchasing office based outside Singapore.
- Singapore is a small market that does not operate with the same type of channels to food service/HRI outlets that exist in the United States. There are no mega-sized food service suppliers operating with large sized delivery trucks which exist in the United States. By U.S. standards, most food service industry suppliers are small or very small in size.
- The food service supply channels have not yet consolidated around large corporations. While there are some larger businesses involved, for example *Auric Pacific*, *Ben Foods* (QAF Group), *Indoguna*, and *Singapore Food Industries*, many food service suppliers are smaller family-owned and operated businesses. The larger businesses tend to be involved in the bulk area of the price sensitive market, with the smaller businesses operating as specialty food suppliers in the

segments where quality and customer service is in high demand.

C. SUB-SECTOR PROFILES

1. Major International Chain Hotels & Resorts in Singapore


The table below profiles the food and beverage outlets in the top international chain hotels operating in Singapore. Their food products or ingredients are mainly procured through importers/distributors and or food service suppliers. There are also lower to mid-range hotels, generally they are not major purchasers of imported or U.S. food products.

| Hotel Chains | Hotel Names | F&B establishments |
|---------------------------------------|---|--|
| Fairmont Raffles Hotels International | Swiss Hotel the Stamford | International cuisine, Asian cuisine, Italian, Western cuisine, fine dining, cafés, bars, and lounge |
| Fairmont Raffles Hotels International | Fairmont Singapore | Share the same F&B establishments with Swissotel as the hotels are located next to each other |
| Park Royal Hotels | Parkroyal Hotels: Beach Rd. Pickering Rd, Kitchener Rd; Parkroyal Service apartments, Beach Road | International cuisine, fine dining, coffee house, Asian cuisine, deli, and bars. |
| Four Seasons Hotels and Resorts | Four Seasons Singapore | International cuisine, Asian cuisine and bar. |
| Hilton Worldwide | Hilton Singapore, Conrad Centennial Hotel | International cuisine, coffee house, Asian cuisine, and lounge, deli, bars, and juice bar. |
| Hyatt Hotels Corporation | Grand Hyatt Singapore | International cuisine, local food, Asian cuisine, European cuisine, coffee house, casual dining, bar, club and cafe. |
| Intercontinental Hotel Group | Intercontinental Singapore, Holiday Inn Express Clarke Quay, Holiday Inn Spore Orchard Center, Holiday Inn Singapore Atrium, Holiday Inn Express Singapore Orchard Road, and Crowne Plaza, Changi Airport | European cuisine, Asian cuisine, coffee house, bars and lounges. |
| Marriott International | Singapore Marriott Tang Plaza Hotel, The Ritz Carlton Millenia Singapore | International cuisine, alfresco grill, Asian cuisine, deli, and lounge. |
| Millennium Hotels | M Hotel Singapore, Grand Copthorne Waterfront Hotel, Orchard Hotel, Copthorne King's Hotel, and Studio M hotel. | International cuisine, coffee shop, bar, Asian cuisine, and lounge. |
| Regent Hotels and | Regent Singapore | International cuisine, Asian |

| | | |
|--------------------------------|---|--|
| Resorts | | cuisine, European gourmet, and cafe. |
| Shangri-La Hotel and Resorts | Shangri-La Hotel Singapore, Shangri-La's Rasa Sentosa Resort & Spa, Singapore, Hotel Jen Orchard Gateway, and Hotel Jen (formerly Trader Hotel) | International cuisine, Asian, Mediterranean, fine dining, deli, bars and lounges. |
| Starwood Hotels and Resorts | The St. Regis Singapore, The Westin Singapore, Sheraton Towers Singapore, and W Singapore | International cuisine, Asian cuisine, American cuisine, European cuisine, fine dining, bars, lounges, coffee/ tea place. |
| Pan Pacific Hotels and Resorts | Pan Pacific Singapore (Marina), Pan Pacific Orchard, Pan Pacific Serviced Suites Beach Road, and Pan Pacific Serviced Suites Orchard | International cuisine, Asian cuisine, American cuisine, gourmet grocery and café, bar and lounges. |
| Meritus Hotels and Resorts | Mandarin Singapore Hotel, Marina Mandarin | International /Mediterranean cuisine, Asian cuisine, café, lounge, and bars. |
| Mandarin Oriental Hotel Group | Mandarin Oriental Singapore | International cuisine, Asian cuisine, American cuisine, European cuisine, bar and lounge. |

(Source: Hotel websites)


2. Table on Restaurants/Fast Foods in Singapore



| Company (Product Type) | Sales (2015/16) | Outlet Name, Type, & Number of Outlets | Locations | Purchasing Agents |
|---|-----------------|--|---|-------------------------|
|  <p>Crystal Jade Culinary Concept Holdings Founded and based in Singapore in 1991. The local restaurant chain was bought over in 2014 by Paris-based luxury group LVMH Moët Hennessy Louis Vuitton's private</p> | n/a | <p>The group comprises 120 restaurants, from high-end, fine-dining concepts to casual Chinese cuisine, in 10 countries from China to India, and 27 cities. It has 47 restaurants in Singapore.</p> | <p>Singapore.</p> <p>Overseas: across 18 cities in 9 regional countries: Indonesia, Malaysia, Thailand, Hong Kong, China, Japan, Vietnam and South Korea.</p> | Importers/ distributors |



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| equity arm, L Capital Asia. It owns over 90 percent of the group. The restaurant chain serves mainly Cantonese food. | | | | |
|  <p>Sakae Holdings Ltd. Flag ship brand of Apex-Pal International Ltd. The local restaurant chain offers quick service Japanese cuisine; sushi on a conveyor belt (kaiten); and a la carte, and caters to mainly low to mid-level markets. Does catering services via its Nouvelle Events brand</p> | Total Revenue: \$86 million (2016) | Over 100 outlets (40 Sakae Sushi outlets in Singapore), China, India, Indonesia, Malaysia, the Philippines, Thailand, Vietnam, the United States, and Japan. Portfolio of brands – <i>Sakae Sushi, Sakae Teppanyaki, Sakae Delivery, Sakae Junior Club, Hei Sushi and Hei Delivery</i> (halal certified), <i>Senjyu, Kyo by Sakae, Crepes & Cream, Sakae Express, Sachi, Sakae Shoppe</i> and <i>Nouvelle Events</i> | Singapore Regional countries: Indonesia, Japan, Malaysia, the Philippines, Thailand, Vietnam, and the United States. | Direct sourcing from fish farms (farm to fork) Importers/distributors |
|  <p><i>Old Chang Kee</i> Brand An established local snacks (fast food) chain offering local snacks including curry puffs, all halal certified in 2005. Brand owned by Ten & Han Trading Pte. Ltd. The company also operates mobile kitchen/catering</p> | Total revenue: \$73.9 million (2016) | 89 <i>Old Chang Kee</i> outlets are located in Singapore, and overseas: three in China, two in Malaysia, four in Indonesia and three in the Philippines. Other brands include <i>Take 5</i> (local casual food), <i>Pie Kia</i> (local pies), <i>Dip n Go</i> (snack food with dips), <i>Mushroom café</i> (Al fresco local food) and <i>Curry</i> | Singapore Overseas: China, Malaysia, Indonesia, Australia, and the Philippines | Direct/Importers/distributors |


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| services (brand (O' My Darling) | | Times (curry themed restaurant). | | |
|  TungLok Group Owns and operates a number of mainly high end/ mid-scale Chinese restaurants. The local group provides management consultancy for the F&B industry as well; offers franchise opportunities for its outlets; and also manufactures festive food and dim sum. | Total revenue: \$86.1 million (2016) \$85 million (2015) | The group owns and manages over 83 (as march 2015) restaurants in Singapore, China, Japan, and Indonesia. The brands are (each one is a unique type of Chinese cuisine): Dancing Crab Lao Beijing LingZhi Vegetarian Tóng Lè Private Dining TungLok Heen TungLok Signatures Ruyi - Chinese Fast Food Shin Yeh Restaurant Slappy Cakes TungLok Seafood TungLok Teahouse TungLok XiHé Peking Duck Singapore Seafood Republic Lokkee | Singapore Overseas: China, Japan, Indonesia and Vietnam. | Importers/distributors. |
| Imperial Treasure Restaurants Group Pte. Ltd. (Founded in 2004) The local group offers Chinese cuisine and caters to the mainly high-end and also mid-scale markets. In 2014, Navis Capital Partners Ltd. (Malaysian owned) has acquired a major stake in Imperial Treasure Restaurant Group (known for its “super peking duck”. | N/A | The Group has 30 restaurants mainly in Singapore and 2 in Shanghai. Each brand is a unique type of Chinese cuisine, such as Teochew (a Chinese dialect group), Cantonese seafood, Peking duck, steam boat (Chinese hot pot), noodles and congee, hand-made noodles and bakeries. | Singapore Overseas: China, Hong Kong, South Korea, France and U.K. (Opening 2018) | Importers/ distributors |



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| <p>Imperial Treasure founder Alfred Leung remains a shareholder and involved in the business. (Alfred previously started Singapore Crystal Jade Concept Holdings restaurant, which was bought over by L Asia Capital, private equity arm of Louis Vuitton Moet Hennessy (LVMH).</p> | | | | |
|  <p>McDonald's Singapore – wholly owned by McDonald's Corporation, Oak Brook, U.S. Like other McDonald's worldwide, the Singapore outlets primarily sell hamburgers, cheese burgers, french fries, breakfast items, soft drinks, milkshakes and desserts. Responding to demand for healthier products, the menu has expanded to include salads, wraps and fruit smoothies. The QSR opened its first restaurant in Singapore in 1979.</p> | N/A | <p>McDonald's Singapore has grown to 137 outlets across the island. The QSRs typically offer counter service and drive through service in a few outlets. Most outlets are located in shopping malls. There are also McCafés (Starbucks style coffee shop) that offer better quality coffee and cakes.</p> | Singapore | Importers/distributors |

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| All outlets are halal certified. | | | | |
|  <p>International Coffee & Tea LLC – privately owned by Singapore’s Sassoon family. Known for its Original Ice Blended coffee and tea drinks, hot coffee drinks, and hot and iced tea drinks. It also sells sandwiches/pasta and a variety of whole bean coffees, whole leaf teas, flavored powders, and baked goods. Opened the first outlet in Singapore in 1996. In 1998, Singapore’s Victor and Sunny Sassoon and Severin Wunderman bought the parent company bringing the chain globally. However, in 2013, a significant equity position was acquired by U.S.-based Advent International, in partnership with South Korea-based Mirae Asset Private Equity and</p> | N/A | <p>The coffee chain has 16 outlets in Singapore. The outlets are known as “<i>Coffee Bean & Tea Leaf</i>”</p> <p>The outlets are usually located in shopping malls.</p> | Singapore | Importers/distributors. |

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| <p>Taiwan-based CDIB Capital, with the Sassoon family retaining a major share.</p> <p>The chain serves halal and kosher food.</p> | | | | |
|  <p>Burger King – Rancak Selera Sdn Bhd – current BK franchisee in Malaysia – acquired a 100% stake in Burger King Singapore in 2012. The QSR opened in 1982 and primarily sells hamburgers, cheese burgers, French fries, salad, breakfast items, soft drinks, milkshakes and desserts. The chain is halal certified.</p> | N/A | <p>More than 36 outlets across the island, mostly located in shopping malls.</p> | Singapore | Approved Importers/Distributors |
|  <p>Carl's JR – CKE Restaurants Inc. entered into a franchise agreement with Aspac F&B Pte Ltd in 2004 to open Carl's Jr restaurants in both Singapore and Malaysia.</p> <p>The QSR offered</p> | N/A | <p>There are 4 “Carl's Jr.” outlets across the country.</p> <p>Outlets are usually located in shopping malls.</p> | Singapore | Importers/distributors. |

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| premium quality charbroiled burgers, chicken burgers, fries and dessert. | | | | |
|  <p>Domino Pizza's – its franchise holder, Domino's Pizza Singapore – is a sister company of Domino Pizza Malaysia which has been running 40 outlets in Malaysia since 1997.</p> <p>Domino Pizza returned to Singapore in 2010 after a 10 years absence. It serves halal food.</p> | N/A | <p>There are 22 “Domino Pizza’s” outlets across the country.</p> <p>The outlets are located in shopping malls/ or as stand-alone outlets and some are also located in housing estates in suburban areas.</p> | Singapore | Importers / distributors. |
|  <p>Kentucky Fried Chicken (KFC) – with its HQ in KL, Malaysia, QSR Brands (M) Holdings Sdn. Bhd. operates KFC restaurants in Singapore – also Malaysia and Brunei. KFC Singapore opened its first outlet in 1977, and serves fried chicken, burgers,</p> | N/A | <p>There are 80 “Kentucky Fried Chicken” outlets across the country.</p> <p>The outlets are located mainly in shopping malls.</p> | Singapore | Importers / distributors. |

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| wraps and desserts. It serves halal food. | | | | |
|  <p>Long John Silver – Yum sold Long John Silver's to LJS Partners LLC, led by a group of franchisees and other investors. Long John Silver's opened its first outlet in 1983 in Singapore; and the QSR chain offers reasonably priced fish, seafood and chicken dishes. It serves halal food.</p> | N/A | <p>There are 19 “Long John Silver” outlets across the island. Outlets are mainly in shopping malls and MRT network at prime locations</p> | Singapore | Importers / distributors. |
|  <p>Pizza Hut – QSR Brands (M) Holdings Sdn Bhd also operates Pizza Hut outlets in Singapore – and Malaysia, too. Aside from pizzas, the QSR chain also offers pasta, baked rice, soup /salad, and dessert. It offers halal food.</p> | N/A | <p>There are 28 “Pizza Hut” outlets across the country.</p> <p>Outlets are mainly in shopping malls.</p> | Singapore | Importers / distributors. |
|  <p>Starbucks Coffee Singapore, a wholly owned subsidiary of</p> | N/A | <p>“Starbucks” Singapore opened its 100th outlet in the country in February 2014.</p> <p>The outlets are</p> | Singapore | Importers / distributors. |

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| <p>Starbucks Coffee Corporation since June 2004.</p> <p>Starbucks Coffee Singapore opened its first outlet in 1996. Aside from coffee beverages, the chain also offers tea, chocolate beverages, sandwiches and pastries.</p> | | <p>mainly located in shopping malls and office buildings.</p> | | |
|  <p>Krispy Kreme – Krispy Kreme signed a franchise agreement with Singapore’s Star360 Group to open 15 stores in the country. Star360 is owned by Andy Chaw – the group has businesses in retail and distribution, operating 30 retail stores and distributing to more than 4,000 point of sale in the region.</p> <p>Krispy Kreme opened its first outlet in 2013. It offers doughnuts and coffee /tea beverages.</p> | N/A | <p>There are currently 9 “Krispy Kreme” outlets across the country.</p> <p>So far, the outlets are located each at a shopping mall, airport and office building.</p> | Singapore | Importers / distributors. |
|  | N/A | <p>There are 2 “Chili’s” outlets across the</p> | Singapore | Importers / distributors. |

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| Chili's (R) Grill & Bar – Brinker international signed a franchise agreement with Grandko Restaurants to open four new restaurants in Singapore. Chilli's is one of the returning restaurant franchises in Singapore. Chilli's opened its outlets in 2009 after years of absence from Singapore. It is a casual dining restaurant that offers Tex-Mex cuisine. | | country. So far, one outlet is located in a shopping mall, and the other outlet is located in a mainly dining area along a riverside quay. | | |
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3. Institutional

A. In Singapore, Singapore Airport Terminal Services Limited (SATS) is the leading provider of gateway services and food solutions in the region; and has operations at 47 airports in 14 countries. SATS control about 80% of Changi airport's ground handling and catering business. It caters to the needs of various sectors including aviation; food; hospitality; and air freight and logistics services. SATS subsidiaries include *SATS Airport Services*, *SATS Catering*, *SATS Security Services*, *Aero Laundry & Linen Services*, *Aerolog Express*, *Country Foods Pte Ltd.* and *Singapore Food Industries (SFI)*.

SATS provide both inflight and commercial catering. For inflight catering, SATS provides 80,000 meals per day to its customers including Singapore Airlines, *SilkAir*, *Etihad Airways*, *Cathay Pacific* and *Qantas*. For commercial catering, SATS provides catering for large scale markets: military, hospitals and food retail stores; events catering: corporate, MICE events and large scale events -Asian Youth Games (2009), 1st *Youth Olympic Games* (2010) and **Singapore National Day**; and via its premier *Le Lifestyles* brand, also provides catering services for food outlets such as bars and fine dining restaurants.

B. The "other" caterers in Singapore are typically small to medium sized private enterprises that serve local food products although they may use imported canned fruits, frozen vegetables, and bakery mixes. They typically cater to schools, company events, private social functions and factories.

SECTION III: COMPETITION

The USA's competition comes from two broad types of countries; developed and developing countries with temperate climates and related agricultural-food products. It should be noted that other developed countries such as the United States are also facing competitive challenges from competing countries such as China, some South American countries and South Africa.

Competition in the HRI/food service supply market is aggressive from certain low-cost countries in some of the United States' core target markets for example, chicken (Brazil) and fish fillets (Vietnam). Competition from other quality countries, for example, Australia (freight advantages), New Zealand and some European countries (for example, France and Netherlands) because of strong and longstanding links between exporters in these countries and their loyal importers in Singapore.

European exporters also benefit from demands for provenance (original origin of products) and also from very strong demand-pull from European executive chefs who work in 4 to 6 star hotels in Singapore.

Competition Summary Table

U.S. exports of agricultural products to Singapore totaled \$738 million in 2016.

SECTION IV: BEST PRODUCT PROSPECTS

| Product Category | Major Supply Sources | Strengths of Key Supply Countries | Advantages/Disadvantages of Local Suppliers |
|--|---|---|--|
| Dairy (Inc. Cheese) Net Imports: \$689 million | 1. New Zealand: 29% 2. Australia: 21% 3. Thailand: 8% 4. France: 6% 5. U.S.A.: 4% | NZ: freight advantage and exportable supplies; traditional supplier Australia: freight advantage, leads in liquid milk; and processed cheese. Most retailers' in-house brands are imported from Australia. U.S. exports \$105 million in 2014. | Local dairy companies are strong competitors and have brand/name familiarity with the domestic consumers. The local brands include <i>Magnolia</i> , <i>Farmhouse</i> , <i>Daisy</i> (F&N), <i>Meji</i> (Meji Co. Ltd.) and <i>HL</i> and <i>Marigold</i> brands (Malaysian Dairy Industries) |
| Beef and Offal Net Imports: \$209 million | 1. Brazil: 33% 2. Australia: 32% 3. U.S.: 9% 4. New Zealand: 9% | Australia has freight advantage and enjoys status as traditional supplier; NZ also price competitive. Brazil competes in the frozen beef segment. | Singapore does not produce beef. |
| Pork and | 1. Brazil: 28% | Brazil dominates the | Live pigs from Indonesia are |

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| Offal Net Imports: \$289 million | 2. Australia: 22% 3. Netherlands: 15% 4. China: 9% 5. U.S.A.: 5% | frozen segment while Australian pork dominates the fresh/chilled market due to its close proximity and the well-developed air-flown supply chain. U.S. processed pork is popular. | imported and slaughtered; most of the meat is sold wet/traditional markets and supermarkets. |
| Poultry Net Imports: \$ 255 million | 1. Brazil: 76% 2. U.S.A.: 12% 3. Argentina: 3% 4. Malaysia: 2% | Brazil is the most prices competitive. Notable Brazilian brands include Borella, Sadia and Seara. U.S. has been losing market share. | Malaysian live chickens are imported and slaughtered. |
| Eggs and products Net Imports: \$117 million | 1. Malaysia: 88% 2. China: 6% 3. Vietnam: 2% 4. U.S.A.: 1% | Malaysia has close proximity and lower transportation costs. AVA's strict import requirements, limit U.S. opportunities. | Three local farms produce eggs, and are seeking various ways to differentiate their eggs. |
| Fish and seafood Net Imports: \$1.07 billion | 1. China: 13% 2. Malaysia: 13% 3. Indonesia: 10% 4. Vietnam: 10% 5. Norway: 7% 6. USA: 2% | Price competitive. ASEAN countries and China dominate. Fresh/chilled/ prawns, live crabs, frozen cuttlefish, and squids are key products. | 90% of fish and seafood is imported. The remainder is supplied by the 100 sea-based aquaculture operations. Production is increasing. |
| Fresh fruits group Net Imports: \$526 million | 1. U.S.A.: 16% 2. China: 13% 3. Malaysia: 12% 4. Australia: 12% | Top U.S. fresh fruits: grapes, oranges, strawberries and apples. U.S. dominates sales of these fruits when they are in season. Very competitive market with supplies from different sources. | Singapore does not grow any fruits. |
| Fresh vegetables Net Imports: \$447 | 1. Malaysia: 36% 2. China: 28% 3. Australia: 9% 4. India: 5% | Top suppliers have freight advantages in shipping these perishables. U.S. products are air-flown and caters to the | Singapore neither produces fresh vegetables or produce products that compete with U.S. vegetables. |

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| million | 8. U.S.A.: 3% | premium market. | |
| Dried fruits Net Imports: \$17 million | 1. U.S.: 48% 2. China: 20% 3. Thailand: 7% 4. Turkey: 6% | U.S. dried fruits very popular. Some are repacked and sold under local brands. | Singapore is not a major producer of edible nuts and dried fruit. |
| Dried Nuts Net Imports: \$123 million | 1. Indonesia: 38% 2. U.S.A.: 17% 3. India: 8% 4. Thailand: 6% | U.S. nuts are very popular. Some are repacked and sold under local brands. | Singapore is not a major producer of edible nuts. |
| Non-alcoholic beverages Net Imports: \$345 million | 1. Malaysia: 53% 2. U.S.A.: 7% 3. Thailand: 6% 4. Vietnam: 4% | Regional fruit juices dominate food service products. U.S. leads the chilled retail-packed fruit juices. Notable U.S. brands include Welch's, Del Monte, Minute Maid FL Citrus, Ocean Spray. | A strong sector in fruit juices, such as Fraser & Neave, Malaysia Dairy Industries, and Pokka Singapore. |
| Wine and Beer Net Imports: \$639 million | 1. France: 53% 2. Australia: 8% 3. Malaysia: 5% 4. Vietnam: 5% 7. U.S.A.: 3% | France dominates the premium wine market. Australia dominates the retail market with its "mass market" wines to premium ones. The U.S. competes on the "mass market" and premium products. For beer, Asia Pacific Breweries (APB) and import leader Carlsberg (Malaysia) dominate the domestic market. | Singapore does not produce wines. Asia Pacific Breweries (APB), Singapore's biggest beer manufacturer dominates the beer market with well established brands such as Tiger, Heineken, Anchor, ABC, Baron, and Guinness stout. APB has a diverse repertoire of other imported beers. |

(Source: Global Trade Atlas)

- According to Euromonitor, the Singapore economy grew by 2% in GDP in 2016 with unemployment rate at 2%. The economy is showing signs of stagnancy. Singaporeans are known to be more affluent, however, its market has matured with many segments shifting from growth markets to slow and steady growth over the past 10 years. This situation exists because of limited capacity of some segments to take in significant volumes of additional products as a result of rising household incomes and population growth. In some cases, this has also resulted in more challenging competition from local supplies as demand has slowed, for example from locally-slaughtered chicken and pigs, beer and locally produced and/or farm-raised fish and seafood.

- Although the Singapore market is in its mature stage, it does not undermine United States' opportunities because Singapore is a market for many food products. However, competition is made more intense, which results in the need for the United States and its exporters to take a much more targeted, service-oriented, brand-driven and differentiated approach in developing their target markets.
- This is particularly the case in markets where the United States is faced with aggressive price competition from ASEAN countries (multinational-owned factories and some fresh produce from the Genting highlands in West Malaysia), and from China (now a very important and constantly evolving "direct" competitor) and Brazil (in some segments).

Category A: Products Present in the Market with Good Sales Potential

| Product Category | 2016 Market Size (Volume) Metric Tons | 2016 Imports | 5-Year Avg. Annual Import Growth Key | Key Constraints Over Market Development | Market Attractiveness for USA |
|-------------------------|--|---------------------|---|---|---|
| Dairy Products | 333,610 | \$689 million | -6% | Availability of products from New Zealand, Australia and France. | With better product understanding, opportunities exist for development for U.S. dairy products. |
| Fresh Fruits | 443,135 | \$526 million | 5% | Strong competition from China, Malaysia, Australia and South Africa | Strong demand for U.S. products for premium fruits such as stone fruits, summer berries and avocados. |
| Dried Fruits | 4,673 | \$17million | 0% | Price sensitive market. | Very strong demand for U.S. Dried fruits |
| Edible Nuts | N/A | \$123 million | -3% | Price sensitive market. | Very strong demand for U.S. nuts. |

Category B: Products Not Present in Significant Quantities But Have Good Sales Potential

| Product Category | 2016 Market Size (Volume) Metric Tons | 2016 Imports | 5-Year Avg. Annual Import Growth Key | Key Constraints Over Market Development | Market Attractiveness for USA |
|-------------------------|--|---------------------|---|--|--------------------------------------|
| | | | | | |

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|----------------------------------|--------------------|----------------|------|--|---|
| Fish and Seafood | 193,710 | \$1.07 billion | 0% | Intense competition from lower cost regional suppliers such as China, Malaysia, Indonesia and Vietnam | High fish consumption with fish and meat accounting for approximately 40% of a typical diet. |
| Pork | 89,698 | \$289 million | 1% | Strong competition from Australian air-flown fresh product, and frozen Brazilian product at the lower segment | Major protein food staple, good prospects in high-end outlets where consumers pay premium price for higher quality. |
| Fresh Vegetables (seasonal ones) | 538,476 | \$538 million | 4% | Price sensitivity for some vegetables such as asparagus as well as lower priced alternatives from regional markets such as Malaysia, China, India and Australia. | Solid demand for U.S. produce, consumers will pay premium for fresh air-flown produce. |
| Wine & Beer | 157,737,696 liters | \$639 million | 1.4% | Diverse competitive market with a massive number of labels from Australia, France, Italy, Chile, South Africa, etc. | Broad and wide market, with many opportunities at the right price point. |

(Sources: Global Trade Atlas (GTA))

APPENDIX: POST CONTACT AND FURTHER INFORMATION

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FAS is USDA's export promotion arm for U.S. agricultural products overseas. FAS Singapore is one of its offices at the U.S. embassy that represents USDA overseas. For more information, please log onto the FAS website: www.fas.usda.gov

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- select post that issued the report