



THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT
POLICY

Required Report - public distribution

Date: 12/10/2015

GAIN Report Number: SN5005

Singapore

Retail Foods

Annual 2015

Approved By:

Joani Dong

Prepared By:

Alice Kwek

Report Highlights:

Singapore is one of the world's most open economies and is highly dependent upon international trade. Singapore's retail foods market is diverse, dynamic and extremely competitive. Singapore only produces 10 percent of its own food and imports 90 percent from other countries. Consumer spending on food and beverages is expected to grow 5 percent annually from 2016 through 2018 which will drive continued growth in the retail foods sector. Demand from Singapore's retail sector is fueling growth in U.S. exports of consumer oriented food products which is valued at US\$607 million in CY2014. Products include fish and seafood, dairy products, meat products, fresh produce, snack foods and processed fruit and vegetables. The United States was Singapore's the 4th largest supplier.

Post:

Singapore

Table of Contents

SECTION I: MARKET SUMMARY	3
SECTION II. ROAD MAP for MARKET ENTRY	7
SECTION III. COMPETITION.....	11
SECTION IV. BEST PRODUCT PROSPECTS	14
APPENDIX I. POST CONTACT AND FURTHER INFORMATION.....	16

SECTION I: MARKET SUMMARY

Singapore, with a population of 5.5 million, is a fairly wealthy country and a highly developed market economy as a highly urbanized island. Strategically located in the middle of key trade flows from Asia, Australia, Europe, the Middle East and the United States., Singapore is one of the world's most open economies and is highly dependent on international trade. The main pillars of the economy are electronics manufacturing, pharmaceutical manufacturing, oil refining and petrochemicals, banking, insurance and financial services, tourism and trade. Singapore's total GDP of US\$307 billion is the ninth largest economy in the Asia Pacific region. Her strategic location also contributes To Singapore's position as a regional food showcase and headquarters for international food and agricultural related companies.

Singapore is almost entirely dependent upon 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 except for a Goods and Services Tax (GST) of 7 percent levied for all goods and services at the point of distribution.

In 2014, Singapore imported US\$12.66 billion of agriculture, fish and forestry products. The United States was the 4th largest supplier, accounting for US\$999 million in imports. Malaysia, Indonesia, and China are the other members of the top three in descending order. 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 United States 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 countries which export similar high value consumer-oriented products. Australia, New Zealand, EU, Brazil, China and South Africa export similar consumer oriented products including temperate climatic fresh fruit 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 newcomers. Competition in some of the consumer product categories may sometimes be very intense.

Major Food Retailers. The Singapore's retail sector is highly developed and competitive, total sales were US\$5.5 billion in 2014. The four major categories of retailers are: (1) large retailers including supermarkets and hypermarkets; (2) convenience retailers; (3) traditional stores and (4) specialty stores. The sector is dominated by three key players: the NTUC FairPrice Cooperative, Dairy Farm International and Sheng Siong Supermarket.

- NTUC FairPrice Cooperative remains the leading grocery retailer with a market share of 33 percent. NTUC has a network of more than 280 grocery channels comprised of *FairPrice* supermarkets *FairPrice Xpress* hypermarkets as well as *Cheers* convenience stores located island wide. While the primary targets are low to middle income consumers, NTUC reaches out to the middle income consumers through its *Fair Price Finest* chains. Warehouse Club, a first

membership-only retail warehouse was recently launched by NTUC offering bulk groceries and consumables. Annual membership fee is priced at US\$ 35.

- Dairy Farm International Group (DFI) targets each consumer segment from the high income consumers to discounts stores with different store formats: Cold Storage which caters to the middle to upper income group; The Market Places and Jason's The Gourmet Grocer which focuses on high and upper middle income consumers; and Giant which targets the lower income segment or the budget conscious. The 7-11 convenience stores located island-wide are also operated by the DFI group.
- Sheng Siong Supermarket, a local chain owned by two brothers targets the lower income consumers with their 38 stores located in residential heartlands (subsidized apartments). It is not uncommon to find products meant for ancestral and religious worship such as joss paper, joss sticks, incense, oils, etc. in the shelves of most Sheng Siong supermarkets. They procure mainly from neighboring countries such as China, Malaysia, Indonesia, Thailand and Vietnam.



A study of contrasts: *Jasons Gourmet Store* (l) located in a prime shopping district known as Orchard Towers and *Sheng Siong Supermarket* (r) located in a Chinatown residential suburb.

(Source: FAS Singapore)

Key Trends.

- Internet retailing in Singapore is growing (although still in its infancy) with forecast sales of US\$1.3 billion in 2015 to US\$1.8 billion in year 2020. An estimated 9 percent of internet retail sales are expected to come from online grocers in 2015. Online grocery retailing which used to be dominated by major supermarket retailer Cold Storage and NTUC Fairprice, saw a new competitor, *Red Mart* which emerged in 2011, offering consumers the choice of same day grocery delivery within 2-hour timeslots.
- NTUC Fairprice Finest will be opening a 2,790 sq. m. 24-hour supermarket at Singapore's first suburban waterfront mall later this year.
- The number of specialty retail stores offering premium and/or organic and natural food products

are also increasing.

- There is a saturation of convenience stores. As convenience stores are located near each other, competition is intense. In addition, they also face stiff competition from supermarkets which offer products at lower prices as well as wider variety. Furthermore, an increasing number of supermarkets are extending their operating hours to cater to consumers, thus increasing competition.
- The food/drink/tobacco specialist category remains fragmented. Within 'others', the majority is represented by bakery specialists. Many independent bakery specialists are located in neighborhood areas, catering to local residents. Independent bakery specialists are gaining popularity among consumers as consumers are able to purchase bread and cakes at lower prices. On the other hand, consumers are also shifting towards more lifestyle products which include artisanal bakery products. This is mainly due to growing affluence among consumers which encourages them to purchase more artisanal and a wider variety of products.

Traditional vs. Modern.

- Convenience is the key in the Singapore industry. The preference is towards modern grocery retailers, such as supermarkets and hypermarkets in particular. Such stores offer one-stop shopping for consumers, a clean, comfortable, and air-conditioned environment, extended opening hours as well as loyalty programs and weekly promotional offerings.

Point to note:

- 1) Agents and distributors bear advertising costs for the products that are placed in weekly advertisements.
 - 2) For a new product, an initial slotting fee is charged by supermarkets in order to have its product placed on their shelves. The fees vary greatly depending on the product, manufacturer and market conditions.
 - 3) Agents/distributors pay for shelf space for their products in any store format.
- Traditional grocery retailers such as wet markets and independent small grocers however, are still preferred by a small group of regular or loyal consumers who perceive food products from wet markets as fresher than products from supermarkets. Some believe that bargaining for lower prices in wet markets could land them with better deals than the latter.

Advantages and challenges for U.S. exporters in Singapore’s retail market

Advantages (Sector Strengths and Market Opportunities)	Challenges (Sector Weaknesses and Competitive Threats)
<p>Singapore relies on imports for virtually all of its food and drink supplies.</p>	<ul style="list-style-type: none"> Singapore’s retail food market is in a maturing and highly competitive state, i.e. growth is slowed as compared to a decade ago.
<ul style="list-style-type: none"> Singapore is one of the wealthiest markets in S.E. Asia, and is a key location for expatriate families to reside in East Asia. It has a small lower income group. 	<ul style="list-style-type: none"> Singapore’s now evident multi-track market is creating challenges for products that are commodities, poorly differentiated or not well supported by marketing activities in retail channels.
<ul style="list-style-type: none"> Singaporeans are well-traveled and have a modernized diet that includes a wide range of foreign concept foods. 	<ul style="list-style-type: none"> Price point is generally an issue in any economy. Singaporeans are no exception, they are price sensitive when it comes to buying food items, e.g., meat and poultry, fresh fruits and vegetables, breakfast cereals (Y generation) and soft drinks. This is underpinned by imported food price inflation over the past 5 years, and it provided opportunities for ASEAN-made and Chinese suppliers to increase their market shares at the expense of exporters such as the United States and Australia.
<ul style="list-style-type: none"> Singaporeans are open to products from the developed countries that are high quality and value-for-money. There a large number of single adults who are very clearly indulgent in their spending patterns. This benefits premium imported meats, some dairy products, exotic fruits, confectionery, wines and spirits, gift items and pet foods. 	<ul style="list-style-type: none"> The Singapore market is well segmented with competition coming for U.S. exporters from the factories of Asian/ASEAN based multinationals, China and the “traditional” supply bases in Australia, the EU and New Zealand.
<ul style="list-style-type: none"> Singaporeans generally perceive “Made in USA” and its brand-owners as quality suppliers of food and drink products. 	<ul style="list-style-type: none"> U.S. exporter weakness in the inability to service Singapore importers, retailers and end consumers in a way that closely meets with their specific requirements and expectations such as on order sizes, packaging and formats, taste, pricing that “fits” the market and need for

	promotional support. This is viewed negatively by Singapore importers.
<ul style="list-style-type: none"> U.S. brand-owners and some USDA cooperators have good shares in some of Singapore’s mainstream market segments (breakfast cereals and some fresh fruits) and smaller niches such as organic products). 	Some U.S. products are not understood by Singaporeans and are never explained to them, e.g., ready-to-consume prepared TV dinners. Such products do not have a “fit” in local food culture.

SECTION II. ROAD MAP for MARKET ENTRY

1. Entry strategy.

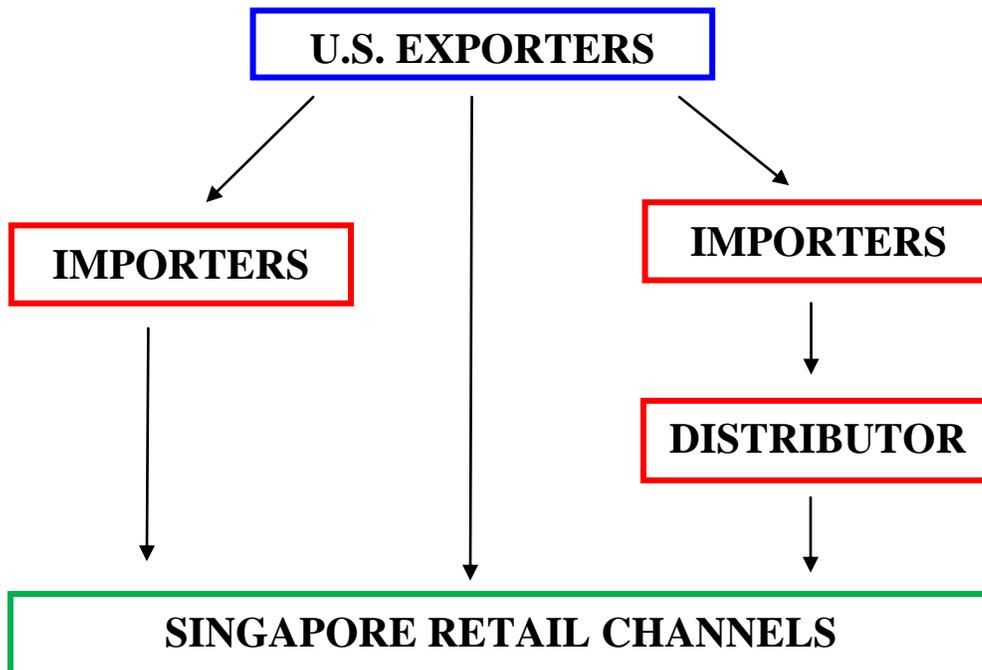
- Get an understanding of the Singapore retail market, for e.g. consumer preferences and what sells and works well. Interested U.S. exporters are advised to conduct a market research on their own specific opportunities to confirm how their products fit in the Singapore market, and develop a sound and appropriate business export plan and or market strategy. Market research as the following:
 - Product fit. E.g. as a mass market item, high-end niche item, novelty/exotic item, seasonal festive/gift item, etc.;
 - Price competitiveness versus available and comparable brands already in the market;
 - Packaging size and quality that meets customers’ expectations;
 - How does the product fit into the local food culture;
 - What kind of market communications are necessary to create brand support and consumer education;
 - Ability to meet retailer purchase requirements and specifications.
- Study what successful U.S. exporters have done in practice in the Singapore market.
- Identify and appoint a knowledgeable and experienced importer/distributor as a strategic partner.
- Understand the Singapore’s regulatory body, i.e. Agri-Food and Veterinary Authority governing food regulations, documentation and certification requirements, particularly if exporting fresh produce, meat, poultry and fish and seafood.
- U.S. exporters seeking a sustained market presence should place their products in the major supermarket chain stores such as the Cold Storage, Market Places, and FairPrice Finest supermarkets.

2. Distribution Channels

Food products in Singapore are generally distributed through local importers/distributors who in turn supply them to retailers. Large retailers also procure directly for cost efficiencies, and they have their own warehousing facilities to store and to repack goods. Distribution to wet markets, hawkers, and small neighborhood stores is usually managed by a number of intermediary wholesaler, however market penetration of U.S. products in these alternative channels is limited.

Singapore's distribution channels for consumer-ready foods are dominated by supermarkets and hypermarkets, and the two leading convenience store chains, i.e. *7-Eleven* and *Cheers* which are also owned and operated by the two leading supermarket operators, NTUC FairPrice Cooperative and Dairy Farm Group.

Flow Chart for Distribution of Consumer Ready Food and Drinks in Singapore



A. Super Stores, Supermarkets, Hypermarkets Or Super Centers, Club And Warehouse Outlets

The table below provides information on the major retailers:

Retailer	Outlet Types	Annual Sales (\$ mil) (2014)	No of Outlets	Location	Procurement method
Fairprice (cooperative)	Super, hyper, convenience, and online.	\$1,830	285 outlets	Island-wide	Directly, consolidators and agents/distributors.
Dairy Farm International	Super, hyper, convenience, and online	\$1,545	848 outlets	Island-wide	Directly, consolidators and agents/distributors.
Sheng Siong	Supermarkets	\$546	33 outlets	Island-wide	Directly, consolidators and agents/distributors.

- Other major retailers with fewer supermarkets include:
 - Prime Supermarkets with 19 stores, mainly located in heartlands (neighborhood areas) and operate on a 24-hour basis, targets budget-conscious consumers.
 - Two Japanese retail stores: (1) Meidi-Ya Singapore, an overseas branch of Meidi-Ya Co Ltd, one of Japan's premium supermarket operators; and (2) Isetan Supermarket, another Japanese chain;
 - Mustafa supermarket, a single location in Little India that carries a variety of products, importing from India as well as other countries for low cost products.

B. Convenience Stores And Other Small Format Stores

Retailer & Market Type	Ownership	% Sales 2014	No. of Outlets	Locations	Purchasing Agent Type
7-Eleven (convenience)	HK (DFI)	0.6	502	Island wide	Importer/Agent/Distributor
Cheers (convenience)	Local (NTUC FairPrice)	0.2	139	Island wide	Importer/Agent/Distributor Importer
Choices (gas mart)	Local (Singapore Petroleum)	0.2	40	Island wide	Importer/Agent/Distributor
Star Mart	Local	0.2	27	Island	Importer/Agent/Distributor

(gas mart)	(Caltex)			wide	
FairPrice Xpress (gas mart)	Local (NTUC FairPrice)	0.2	23	Island wide	Importer/Agent/Distributor
i-Econ (local retail franchise concept)	Local (Hanwell Holdings)	0.9%	85	Island wide (mostly in heartlands)	Strategic Partner Importer/Wholesaler/Agent

In addition, other retail chains offer personal care products along with food and beverages. Health and beauty specialist retailers account a value sales of US\$ 1.4 billion, includes the following major players:

Retailer & Market Type	Ownership	% Sales 2014	No. of Outlets	Locations	Purchasing Agent Type
Watsons	Watsons (DFI Group)	19%	112	Island wide	Importer/Agent/Distributor
Guardian	DFI Group	18%	147	Island wide	Importer/Agent/Distributor
Unity	NTUC Healthcare	5%	55	Island wide	Importer/Agent/Distributor
GNC	Osim Int'l	4%	61	Island wide	Importer

C. Traditional Markets – “Mom And Pop” Small Independent Grocery Stores And Wet Markets

With the exception of fresh fruits destined for the wet markets, U.S. sales to this sub-sector are limited. These stores carry mainly local or imported foods from neighboring region and China. The other exception is small independent boutique shops, which specialize in wines, “natural” or and organic, artisanal breads as well as gourmet foods.

SECTION III. COMPETITION

U.S. exports of agricultural products to Singapore totaled \$965 million in 2014.

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages/Disadvantages of Local Suppliers
Dairy Net Imports: \$1,242,422,626	<ol style="list-style-type: none"> 1. New Zealand: 32% 2. Australia: 20% 3. U.S.: 8% 4. France: 6% 	<p>NZ: freight advantage and exportable supplies; traditional supplier</p> <p>Australia: freight advantage, leads in liquid milk; and processed cheese. Most retailers' in-house brands are imported from Australia.</p> <p>U.S. exports \$105 million in 2014.</p>	<p>Local dairy companies are strong competitors and have brand/name familiarity with the domestic consumers.</p> <p>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)</p>
Breakfast cereal Net Imports: \$43,031,774	<ol style="list-style-type: none"> 1. U.S.: 21% 2. Malaysia: 20% 3. China: 16% 4. Thailand: 8% 	<p>International brands dominate: Kellogg's (U.S.) and Post (U.S.); imported directly from U.S. or from regional facilities.</p>	<p>Singapore does not produce breakfast cereals.</p>
Beef and Offal Net Imports: \$ 233,045,098	<ol style="list-style-type: none"> 1. Australia: 41% 2. Brazil: 24% 3. New Zealand: 13% 4. U.S.: 9% 	<p>Australia has freight advantage and enjoys status as traditional supplier; NZ also price competitive.</p> <p>Brazil competes in the frozen beef segment.</p> <p>U.S beef caters to premium market and only boneless beef was eligible for entry in 2014.</p>	<p>Singapore does not produce beef.</p>
Pork and Offal	<ol style="list-style-type: none"> 1. Brazil: 29% 	<p>Brazil dominates</p>	<p>Live pigs from Indonesia are</p>

Net Imports: \$ 370,843,140	<ol style="list-style-type: none"> 2. U.S.: 18% 3. Australia: 14% 4. Netherlands: 12% 	the 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: \$ 354,139,973	<ol style="list-style-type: none"> 1. Brazil: 59% 2. Thailand: 19% 3. U.S.: 12% 4. Malaysia: 3% 	Brazil is the most price competitive. Notable Brazilian brands include Borella, Sadia and Seara. U.S. has been losing market share.	Malaysian live chickens are imported and slaughtered.
Snacks Net Imports: \$ 416,315,848	<ol style="list-style-type: none"> 1. Malaysia: 16% 2. Italy: 12% 3. U.S.: 9% 4. Switzerland: 7% 	Made in Malaysia International Brands such as Mars, Nestle, Kraft Mondelez dominate the market. Stiff competition for expensive shelf space. U.S. top category is chocolate.	A strong local snack manufacturing sector exists, but there is room for more.
Eggs and products Net Imports: \$ 144,798,362	<ol style="list-style-type: none"> 1. Malaysia: 90% 2. China: 4% 3. Vietnam: 2% 4. U.S.: 2% 	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: \$ 1,049,132,259	<ol style="list-style-type: none"> 1. China: 14% 2. Indonesia: 13% 3. Malaysia: 13% 4. Vietnam: 10% 	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.

	13. USA: 2%		
Fresh fruits group Net Imports: \$ 537,816,369	<ol style="list-style-type: none"> 1. U.S: 19% 2. China: 13% 3. Malaysia: 11% 4. Australia: 10% 	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: \$ 432,589,425	<ol style="list-style-type: none"> 1. Malaysia: 39% 2. China: 25% 3. Australia: 8% 4. Thailand: 5% 7. U.S.: 4% 	Top suppliers have freight advantage in shipping these perishables. U.S. products are air-flown and caters to the premium market.	Singapore neither produces fresh vegetables nor produce products that compete with U.S. vegetables.
Dried fruits and nuts (HS code: 08) Net Imports: \$ 723,494,185	<ol style="list-style-type: none"> 1. U.S.: 18% 2. Indonesia: 11% 3. China: 11% 4. Malaysia: 9% 	U.S. nuts are very popular. Some are repacked and sold under local brands.	Singapore is not a major producer of edible nuts and dried fruit.
Non-alcoholic beverages Net Imports: \$ 164,305,859	<ol style="list-style-type: none"> 1. Malaysia: 54% 2. Thailand : 14% 3. Vietnam: 9% 4. Australia: 4% 5. U.S.: 3.34% 	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: \$ 808,181,891	<ol style="list-style-type: none"> 1. France: 56% 2. Australia: 8% 3. Malaysia: 6% 	France dominates the premium wine market. Australia dominates the retail	Singapore does not produce wines. Asia Pacific Breweries (APB), Singapore's biggest beer

	<p>4. Italy: 3%</p> <p>7. U.S.: 3%</p>	<p>market with its “mass market” wines to premium ones. The U.S. competes both on the “mass market” and premium products.</p> <p>For beer, Asia Pacific Breweries (APB) and import leader Carlsberg (Malaysia) dominate the domestic market.</p>	<p>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.</p>
<p>Pet food (dog and cat food) Net Imports: \$ 33,879,128</p>	<p>1. Thailand: 31%</p> <p>2. U.S.: 29%</p> <p>3. Australia: 10%</p> <p>4. China: 5%</p>	<p>Mars Pet Food’s Pedigree, Cesar and Royal Canin and Nestlé’s Purina and Hill’s Science Diet brands dominate.</p>	<p>Singapore does not produce retail pack pet foods.</p>

Source: Global Trade Atlas

SECTION IV. BEST PRODUCT PROSPECTS

Singapore does not impose tariffs on imported goods. Singapore levies a 7% Goods and Services Tax (GST) on all goods.

Except for the following, all other goods enter the Singapore market duty free:

- a. alcoholic beverages (intoxicating liquors),
- b. tobacco products,
- c. motor vehicles and
- d. petroleum products.

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

Product Category	2014 Market Size (Volume) Metric Tons	2014 Imports	5-Year Avg. Annual Import Growth Key	Key Constraints Over Market Development	Market Attractiveness for USA

Breakfast Cereals	1,518	\$43,031,774	15%	Availability of local brands at lower price points.	Consumer health consciousness and for quick breakfast drive demand.
Dairy Products	361,551	\$1,242,422,626	8%	Availability of products from New Zealand, Australia and France.	As consumer becomes gain product understanding, opportunities will exist for development for U.S. dairy products.
Fresh Fruits	433,796	\$537,816,369	11%	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.
Edible Nuts	n/a	\$161,206,955	34%	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	2014 Market Size (Volume) Metric Tons	2014 Imports	5-Year Avg. Annual Import Growth Key	Key Constraints Over Market Development	Market Attractiveness for USA
Fish and Seafood	198,641	\$1,049,132,259	4%	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	89,713	\$323,247,778	14%	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	508,655	\$432,589,425	-0.7%	Price sensitivity for some vegetables such as asparagus as well as lower priced	Solid demand for U.S. produce, consumers will pay premium for fresh air-

				alternatives from regional markets such as Malaysia, China, India and Australia.	flown produce.
Snack Foods	67,757	\$416,315,848	7%	Competition from cheaper sources such as Malaysia and Italy.	Strong demand for quality U.S. products and U.S. product has strong brand recognition.
Wine	32,887,742 liters	\$628,682,522	12%	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.

APPENDIX I. POST CONTACT AND FURTHER INFORMATION

Agricultural Affairs Office
U.S. Embassy/USDA
27 Napier Road
Singapore 258508
Tel: (65) 6476-9289
Fax: (65) 6476-9517
Email: agsingapore@usda.gov