

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Malaysia

Exporter Guide

Annual 2014

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Report Highlights:

With per capita income of over \$10,500 and a middle and upper class making up 61 percent of the population, Malaysia shows good potential for growth as a market for high value consumer products. Best U.S. product prospects include fresh fruits and vegetables, pet foods, dried fruits, nuts, frozen potatoes and processed juices.

Post:

Kuala Lumpur

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Executive Summary:

SECTION I. MARKET OVERVIEW

Malaysia is politically and economically stable and open to foreign trade. Transportation, communications, banking and health services are modern and efficient. With a population of around 29 million, it is one of the most developed nations in Southeast Asia. About 61 percent of its population falls into the middle to upper income group of consumers; with GDP per capita income of \$10,500. Its economy has a firm foundation that includes strong manufacturing, service and agricultural sectors.

The economy continues to perform well, and is expected to grow 5.4 percent in 2014 and 4.6 percent in 2015. Despite the government's cut on fuel subsidies in October 2014, inflation remains at a moderate rate between 3 to 4 percent (note that approximately 30% of goods are price-controlled).

The Malaysian food and beverage market is very developed and sophisticated and is supplied by both local and imported products. Urban consumers are relatively brand conscious and prefer to shop in stores, which offer convenience and good product selections. Hypermarkets/large format stores are the dominant format in urban/metropolitan areas in Malaysia with about 45 to 60 percent of urban household shoppers using them as the main outlet for the majority of their packaged groceries. Traditional markets are losing ground, but are still important outlets for fresh fruits and vegetables.

Advantages and Challenges for U.S. Suppliers

| Advantages | Challenges |
|--|---|
| Malaysia's solid economic prospects and growing consumer purchasing power. | Consumers are generally price sensitive, but also seek new products. |
| Supermarkets and hypermarkets are popular, with new being opened regularly, and are providing greater access for imported foods. | Neighboring competing suppliers have a freight advantage. |
| Malaysia imports about 70 percent of its food needs, including beef, lamb, dairy products, baking ingredients, pasta, and temperate fruits and vegetables. | Muslims comprise 60 percent of the population, so many foods must be certified <i>halal</i> (beef, lamb, poultry and dairy products). |
| Malaysians are familiar with western foods, with western menus and U.S. food service franchise operations prevalent. | Importers and distributors purchase at the lowest price from any exporter or country. |
| Local food manufacturers seek to expand exports, using imports as raw materials. | US exporters face competition from locally produced raw food materials that are in sufficient supply (e.g. poultry, and palm oil). |

SECTION II. EXPORTER BUSINESS TIPS

Business Customs

Malaysians are accustomed to doing business with foreigners and readily accommodate foreign business manners. Younger businessmen are prepared to start new business relationships with foreign companies without the advantage of a personal meeting. These businessmen also prefer to communicate with foreign suppliers electronically.

Prior to initiating any export sales to Malaysia, it would be advantageous to conduct a market survey with particular reference to the competitive environment. It is common for foreign exporters to appoint a local sales agent/importer to distribute their goods, expedite clearance of goods from ports and draw on existing networks of wholesalers and retailers. Regular visits by U.S. exporters to the market are also critical to enhance business relationships.

General Consumer Tastes and Preferences

Malaysia is a multiracial society consisting of three major races. The Malays account for 65 percent of the population, with Islam as the official religion; slightly more than 25 percent of Malaysians are Chinese who may be Buddhist or Christian. Indians form 7.3 percent of the population and they are largely Hindus. There is also a sizeable expatriate population and Malaysia is a popular tourist destination for Asia, the Middle East and Europe.

Lunch and dinner meals consist mainly of rice together with two or three meats/fish and vegetable dishes that are prepared according to the styles and traditions of various ethnic communities. The Malays and Indians prepare their dishes with hot spices while Chinese prefer to stir-fry. Religious affiliation affects food consumption in Malaysia. Muslims do not eat pork, and only eat meat products that have been certified halal, and many Buddhists and Hindus do not eat beef. Thus, halal chicken meat is popular among all consumers and Malaysia has one of the world's highest per capita consumption rates at 35 kg.

With rising affluence and education levels, consumers' shopping and eating lifestyles have changed drastically over the years. Malaysians, especially in urban and cosmopolitan areas, prefer to shop in modern retail outlets, which offer them one-stop shopping options. However, traditional stores such as provision and grocery shops, which are conveniently located in residential areas and workplaces, are still popular.

Malaysians are adventurous in their eating habits. Eating out is common and is relatively inexpensive. Open air, street-stall food is popular. Fine dining restaurants and foodservice outlets incorporating international cuisines are found in Klang Valley and other major cities where spending power and population concentration are higher. Most consumers frequent this type of restaurants to dine in style and comfort and to experience the best and most sophisticated culinary standards in the country.

With a Muslim population of 65 percent, the demand for halal foods by Malaysian consumers has increased over the years. The expectation of halal standard in food products have extended from meat and meat products to non-meat based products such snacks, confectionery, dairy, bakery, etc. Almost all

food and ingredients destined for the food service sector must be certified halal. Halal is fast becoming recognized as a new benchmark for quality, hygiene and safety. Food products and ingredients that have halal certificates have added marketing value in Malaysia. Hence, most retailers, foodservice operators and food manufacturers are inclined to ask for halal certificates for non-meat based food products and ingredients.

Food Standards and Regulations

Malaysian health and food labeling requirements are fairly liberal. The labeling requirements specify that imported and domestically produced processed food items must be labeled in English or Bahasa Malaysia. Labels must contain the following information:

- (a) An appropriate description of the product;
- (b) A list of ingredients in descending order of proportion by weight;
if the item contains any animal product, a statement as to the presence of such animal products (beef, pork, lard, gelatins, etc.,)
- (c) if the item contains any alcohol, a statement as to the presence of alcohol;
- (d) the minimum net weight of the product; in the case of a product packed in liquid, the minimum drained weight of the food;
- (e) the name and address of the manufacturer;
- (f) the name and address of the importer (this can be affixed at the time of import);
- (g) a statement of shelf life or expiry dates.

Certain food additives, preservatives, and artificial colorings approved for use in the United States may not be permitted in Malaysia. Codex approved items are generally allowed if there are no provisions or regulations pertaining to the additives and preservatives in the Malaysian Food Regulation. In addition, products with labels that include phrases such as “Contains No Palm Oil” or “Contains No Tropical Oils” will not be allowed for import. (Malaysia is a palm oil producing country and is a strong advocate of this commodity).

In addition to the general labeling requirements above, nutritional labeling is compulsory for the following foods: prepared cereal foods; various types of bread; variety of milk and powdered milk, including sweetened condensed milk, evaporated milk and cultured milk; canned meat; canned fish; canned vegetable, canned fruit and various types of fruit juices, salad dressing and mayonnaise, various types of soft drink including botanical drink, soya bean milk and soya bean drink.

GM labeling

In July 2014, regulations that require mandatory labeling of food and food ingredients obtained through modern biotechnology went into effect. The regulations say that no person shall import, prepare or

advertise for sale or sell any food and food ingredients obtained through modern biotechnology without the prior written approval of the Director.

Some key elements of the labeling guidelines include the following:

- 1) If the GE content is not more than three percent, labeling is not required, “provided that this presence is adventitious or technically unavoidable.”
- 2) For single ingredient foods, the words “genetically modified (name of the ingredient)” must appear in the main display panel.
- 3) For multi-ingredient foods, the words “produced from genetically modified (name of the ingredient)” should appear in list of ingredients and “contains genetically modified ingredient” must be stated on the main display panel.
- 4) Highly refined foods, defined as those where processing has removed all novel DNA and protein, are exempt from the labeling requirement. (e.g.: vegetable oils, corn syrup, acidic foods, and salty foods).
- 5) Meat from animals fed with GE grains do NOT need to be labeled.
- 6) Only GE crops that have been approved by the National Biosafety Board Malaysia can be used for foods and food ingredients.
- 7) Labeling of ‘GMO Free’ and ‘Non-GMO’ is not permitted.

More information on Malaysian’s Food Regulations 1985 is available at the Ministry of Health’s website: <http://fsis2.moh.gov.my/fosimv2/HOM/frmHOMFARSec.aspx?id=21>

General Import and Inspection Procedures

All food consignments are subject to random checking and sampling at the 34 entry points around the country to ensure food items imported into the country are safe and comply with the prescribed standards and regulations. All meat, poultry and dairy product shipments must be accompanied by appropriate USDA documentation. International freight forwarders normally handle documentation and other formalities with authorities at entry points. Provided all necessary documents are in order, no problems or delays should occur in clearance of goods.

Halal requirement and certification

All beef and poultry products must be certified halal and the products must originate from slaughterhouses that have been inspected and approved by the Malaysian veterinary and religious authorities. An Islamic Center approved by the Malaysian Islamic Development Department (JAKIM) must supervise the slaughter and processing and issue the halal certificate for meat and poultry. The Islamic Center must be listed by the packing plant on the original JAKIM application form or the application must be appropriately amended to make use of a new Islamic Center.

U.S. exporters should also be aware that importers might request additional certificates, which are not required by the authority, either to meet the demand of their own customers or for marketing purposes. For further processed food (which contains no meat), there is no known requirements for any certificate, but exporters are encouraged to acquire *halal* certification from approved Islamic Centers (<http://www.halal.gov.my/v3/index.php/ms/senarai-badan-islam-yang-diiktiraf>) to cater to the Muslim consumer market as Muslims account for more than half of Malaysia’s population and Muslims

consume foods that are *halal*. The *Halal* Certificate should accompany the shipment and the products should have the approved Islamic Center's *halal* logo on their packaging for information and marketing purposes.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Malaysia continues to be a net importer of food with annual imports of \$14 billion.

In 2013, U.S. exports of consumer-oriented and edible fishery products were \$587 million, while total imports of this category were \$7 billion. China is the major supplier with imports at \$1.2 billion, representing 17 percent of the market share. India took the second spot with imports worth of \$745 million which is about 10% of the market share, followed by New Zealand (10%), Thailand (9.5%) and Australia (7.5%).

China is the main supplier of vegetables with reported imports at \$215 million in 2013. Turnip, cabbage, carrot, potato and garlic were among the major items. China is also the market leader for mandarin oranges (\$45 million). Since the US and China are both in the northern hemisphere with similar seasons, US exporters have to compete aggressively with Chinese exporters who can sell their produce at lower prices. South Africa is the main supplier of apples with \$35 million worth of imports, with China second at \$26 million. US Valencia oranges, grapes and apples are popular in the Malaysian market. Imports for 2013 were at \$32 million, \$25 million and \$15 million respectively. Fresh strawberries, raspberries, blueberries and cranberries are niche markets and the U.S. is a major supplier with imports worth over \$1 million annually. Competition is less intense with supplies from Australia and South Africa since they have the opposite seasons.

By tradition, New Zealand is the most favored for dairy products, followed by U.S. and Australia. In 2013, imports of full cream milk powder, skim milk powder, butter and cheeses from New Zealand were at \$516 million, while imports from US and Australia were estimated at \$182 million and \$131 million respectively. US dairy powder is a growing market.

India is the leading supplier of red meat with total imports of \$402 million (118,315 metric tons) in 2013. Indian beef and buffalo meat caters to the mass market. Beef from Australia and New Zealand caters for foodservice with total imports amounted to \$176 million and \$69 million respectively in the same year.

Malaysia is self-sufficient in poultry (broiler/eggs) production. Chicken parts and chicken wings are imported periodically to meet the demand from the local processing industry. In 2013, China was the major supplier for chicken parts and chicken wing at \$56 million. Imports from Thailand and Netherlands were at \$40 million and \$6 million respectively.

Malaysia is a net importer of fish and seafood products with an annual import at \$996 million in 2013. China is the main supplier with \$279 million, followed by Indonesia (\$187 million) and Thailand (\$143 million).

An increasing number of middle to high income consumers in Malaysia demand high quality imported

exotic fish and seafood, especially live, and the bulk of these will be consumed in middle to high-end Chinese seafood restaurants. Lobsters (Boston, Rock), abalone, oysters, scallops, clams (Razor, Blood, Sea, Jackknife), green mussels, crabs (Snow, King, Blue Swimmer, Dungeness), prawns (Mantis), geoduck, farmed sturgeon, razor fish, turbot, grouper, sea bass, bamboo fish, coral trout and carp are popular.

High-end western restaurants and high-end hotels have a demand for premium fresh, chilled or frozen products, such as salmon, cod, Dover sole, halibut as well as oysters, scallops, clams, lobsters, crabs and alike. Most salmon imports (fresh/chilled, frozen and smoked) are distributed to these types of food service outlets.

Supermarkets and hypermarkets are good for fresh chilled or frozen lobsters, crabs, large prawns, mackerel, cod, salmon (included smoked), Hoki, Dori, mackerel, crab meat, mussels, scallops and clams.

Opportunities exist for US fish and seafood exporters to develop their market presence in Malaysia by supplying to these major businesses.

Distribution for consumer-ready food products

Private companies are the major entities in the food distribution system. Food importers and commissioned agents place orders with foreign suppliers and distribute to supermarkets/grocery stores and hotels in the cities and to sundry shops in the rural areas. Several of the larger supermarket and hypermarket chains are importing directly from overseas.

Most products from the United States enter through the ports of Klang, Penang and Johor. Transshipment of food products through Singapore has declined with improvement in shipping facilities offered by major ports in Malaysia. 'Westport' situated in Port Klang and the Port of Tanjung Pelepas (in Johor) has further enhanced Malaysia as a shipping hub.

Malaysia has seven international airports, including the Kuala Lumpur International Airport (KLIA), one of the biggest and most modern airports in the region. Malaysia's modern highway network is the backbone of the country's transport system as 90% of passenger and cargo movements are by roads. Roads link almost every town in Malaysia, and products move efficiently between cities and rural areas.

Food Retail Sector

Malaysia has a large and growing food retail market that is supplied by local and imported products. The current total retail sales of food and beverages are estimated at US\$15 billion. This sector has been growing at an average rate of 7 percent per annum over the past five years.

Malaysian households spend an average 24 percent of their household income on retail purchase of foods. Due to rising affluence and higher education level, Malaysian consumers have become more sophisticated and demand higher quality for the goods that they purchased.

According to Retail Group Malaysia, the bulk of retail food sales are channeled through the traditional stores, such as provision stores, grocery stores, specialty food stores and other sundry shops. This sub-sector commands close to 60 percent of food sales today. Modern stores such as supermarkets, hypermarkets and department stores with supermarkets only have around 39 percent share of the retail food market. Convenience stores have remained insignificant, with only about 1 percent share of the retail food market.

Independent grocery stores and wet markets are found in the residential areas of both urban and rural towns across Malaysia. Most of the food items sold by grocery stores are canned foods, dried foods, snack foods, ice cream, and soft drinks. Fresh produces such as fruits and vegetables are seldom sold and usually do not sell frozen or chilled foods other than ice cream. However, grocery stores known as mini-markets, which are larger and more modern than the traditional grocery stores, would sell these food items. However, they are relatively fewer in numbers compared to the traditional grocery stores.

Wet markets include daily wet markets operating in permanent buildings and weekly morning and night markets operating in non-permanent locations. Food items sold are generally fresh fruits, vegetable, meat and fish. Imports are usually apples, oranges, grapes, carrots, potatoes, onions, cabbages, and broccoli.

Supermarkets and hypermarkets are mainly located in the major urban centers and are continuing to grow in numbers. Foreign-owned retailers operating locally include Tesco, Dairy Farms International (owns Giant, Cold Storage, Jason and Mercato), and Aeon. United Arab Emirates-based supermarket chain Lulu Group is investing \$200 million to open five halal-only supermarket outlets in Malaysia. Lulu's first hypermarket is scheduled to open by the end of 2015. Supermarkets and hypermarkets will continue to see the fastest growth over the next three years. These retail stores provide good venues for imported products and access to the middle and high-income sophisticated consumers.

Competition among the retailers, especially hypermarkets, is intense with large international retailers like Tesco, Giant and Aeon Big frequently engaging in price wars to establish their presence as major players in the market. Meanwhile, Giant, the largest hypermarket operator in Malaysia, is the low-price leader status.

Malaysians are shopping more at convenience stores and petrol marts. Increasing competition has resulted in a need for convenience stores to become more professional. Customers are now expecting more sophisticated offers like a wider range of better quality ready-to-eat snacks and hot-and-chilled beverages.

Key Entry Strategies for US Exporters

1. Market, distribute, and promote through the supermarkets and hypermarkets.
2. Promote food products to create consumer awareness and loyalty.
3. Appoint importers or agents that best meets the needs of the exporter.
4. Ensure that processed foods are acceptable to local taste and have appropriate packaging.
5. Acquire *halal* certification from recognized Islamic institution in the US.

Food Processing Sector

The Malaysian government has identified the food processing industry as a priority sector for industrial development and increase exports. There are nearly 5,731 manufacturers involved in the food manufacturing industry in Malaysia and the industry accounts for nearly 10 percent of Malaysia's manufacturing output. Raw materials such as cereals and dairy products continue to be imported for further processing. Processed foods are exported to more than 200 countries with an annual export value of \$4.4 billion. The main items exported included cocoa and cocoa preparations (\$1 billion), prepared cereal and flour preparations (\$563 million), dairy products (\$299 million), and sugar & sugar confectionery (\$279 million) and prepared/preserved vegetables & fruits (\$181 million). Food manufacturers operating in Malaysia include both Malaysian and multinational companies such as Nestle, Unilever, Cerebos, and Campbell Soup. Major exported countries were Singapore, Indonesia, U.S., Thailand and China.

• Key Entry Strategies for US Exporters

1. Ensure quality of the raw food materials to instill manufacturers' confidence.
2. Acquire *halal* certification to cater to the Muslim consumer market.
3. Emphasize on the competitive advantage of the exporter's products to the food manufacturers.
4. Market and promote to increase awareness among food manufacturers.
5. Establish an efficient distribution network to maximize market penetration.

Food Service Sector

Malaysia has a sizeable and rapidly growing food service market today. The food service market today is valued between \$5 billion to \$6 billion today. The food service market is projected to grow at an average rate of around 7 percent and 10 percent per annum over the next three to five years. This positive forecast is due to growing sophistication and affluence among consumers. Foodservice operators are constantly developing products and services to attract consumers.

Hotels and resorts, restaurants, and the institutional sub-sectors represent the best potential for US exporters. The restaurant sub-sector accounts for 70 percent of the total food service sales. This is followed by the hotels and resorts (8 percent) and catering services to institutions (5 percent). Other sub-sectors include food stalls but are not a potential market for US exporters since they mainly serve relatively cheap local dishes.

Malaysia's tourism industry has also fueled growth of the food service industry. Currently it is the second largest foreign exchange earner after manufacturing. The number of tourists visiting Malaysia reached 26 million in 2013. Total tourism revenue generated was \$20 billion. With the current government's effort to promote Malaysia as a medical tourism hub, tourists' arrivals are expected to grow in the coming years. It is also the only Muslim nation made it to the World's top 10 in ease of doing business. The growth in tourism is expected to fuel the growth of restaurants offering international cuisines such as Middle Eastern and Latin American food.

High tariffs and excise taxes in alcoholic beverages are deterring the consumption of wine in the foodservice sector. Coupled with the high mark-ups on the wine by hotel and restaurant operators, the selling price of the wines is exorbitant and this prohibits further consumption in foodservice outlets.

Key Entry Strategies for US Exporters

1. Conduct promotional activities to create awareness among importers and the food service establishments.
2. Appoint local importers specialized in the food service industry to import and market the exporter's food products to the food service establishments.
3. Target the mid to high-end food service establishments.
4. Acquire *halal* certification from recognized Islamic institutions in the US.
5. Maintain a product positioning strategy for the food products.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

| Product Category | 2013 Imports | 5Yr. Avg. Annual Import Growth | Import Tariff Rate | Key Constraints Over Market Development | Market Attractiveness For USA |
|---------------------------------------|------------------------------|--------------------------------|--|--|---|
| Infant food, including dairy products | 344,336 tons (\$1.2 billion) | 11% growth | No import duties are levied on infant milk/food. | Food cultural barriers exist. Malaysian mothers appear to prefer cereal based infant foods. Locally prepared and packed dairy products of Nestlé, Danone Dumex and Dutch Baby have a strong hold on the market. | The USA is already the major supplier for bottled infant food and the market is upgrading on the back of higher disposable incomes. |
| Fruit juices | 34,667 tons (\$68 million) | 10% growth | 20% except for pineapple juice which incurs 30%. | The retail market for fruit juices is growing, the market is | This market is likely to become more dynamic in future as Malaysians start |

| | | | | | | |
|----------------------------|------------------------------|------------|---|--|---|--|
| | | | | upgrading from cordials on the back of higher disposable incomes. | to understand these products. Opportunities will exist for development by the U.S. pure juice suppliers. | |
| Temperate Fresh Vegetables | 529,775 tons (\$351 million) | 12% growth | No import duty is charged | <p>Competition from key established suppliers from Australia, Indonesia and China.</p> <p>Competition also comes in the form of products from Malaysia's own highlands and some Asian countries.</p> | Demand for temperate vegetables will continue to rise on the back of rising disposable incomes. This will provide opportunities for U.S. suppliers able to compete with Australia, Indonesia and China. | |
| Frozen vegetables | 23,412 tons (\$23 million) | 18% growth | Nil except sweet corn which incurs 5% and frozen potatoes at 7%. | Demand is not very varied and revolves around potatoes, peas, sweet corn and mixed vegetables. | <p>Frozen vegetables, especially potatoes from US are in demand from Malaysian consumers.</p> <p>Note: Food service demand is also important.</p> | |
| Temperate fresh fruits | 349,934 tons (\$273 million) | 12% growth | 5% for strawberry, raspberry and gooseberry and 10% for other fruits except kiwi fruit which incur 30% import duty. | Few barriers exist for popular products such as apples, pears, oranges and grapes. | This is one of the most attractive market segments for the USA to develop. Demand for temperate fruits will rise on the back of rising disposable incomes. | |

| | | | | | | |
|----------------------------------|-------------------------------|------------|--|---|--|--|
| Dried fruits | 29,781 tons (\$27 million) | 23% growth | 10% except for Dates, which incur no import duty. | Mature traditional demand exists except for dates which are growing rapidly on the back of rising disposable incomes. | Attractive to U.S. suppliers with market driven approach to business with Malaysia. | |
| Edible nuts | 87,362 tons (\$115.4 million) | 19% growth | Nil, except for roasted groundnuts which incurs 20% import duty. | Major demand growth is from the food industry. | This market should not be ignored. The USA is already the major supplier and the market is upgrading on the back of higher disposable incomes. | |
| Dog and cat food for retail sale | 58,129 tons (\$95 million) | 16% growth | No import duties are levied on dog or cat food. | Few constraints/barriers exist under conditions where disposable incomes are growing. | Attractive for committed suppliers wishing to actively develop markets on a long-term basis. | |
| | | | | | | |

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

If you have any questions or comments regarding this report or need assistance exporting high value products to Malaysia, please contact the Office of Agricultural Affairs at the U.S. Embassy in Kuala Lumpur at the following address:

Office of the Agricultural Affairs
Unit 4210
DPO AP 96535
Tel : (011-60-3) 2168-5082
Fax : (011-60-3) 2168-5023

E-mail: AgKualaLumpur@fas.usda.gov

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service homepage: <http://www.fas.usda.gov>.

Malaysian Regulatory Agencies / Other Trade Contacts

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Food Safety and Quality Division
Ministry of Health Malaysia
Level 3, Block E7, Parcel E
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Website: www.dvs.gov.my

APPENDIX 1. STATISTICS

KEY TRADE & DEMOGRAPHIC INFORMATION

| | |
|---|-----------------|
| Agricultural Imports From All Countries (US\$Mil) / U.S. Market Share (%) | 17,261/6% |
| Consumer Food Imports From All Countries (US\$Mil) / U.S. Market Share (%) | 6,023/9% |
| Edible Fishery Imports From All Countries (US\$Mil) / U.S. Market Share (%) | 996/3% |
| Total Population (Millions) / Annual Growth Rate (%) | 29.71/1.8% |
| Urban Population (Millions) / Annual Growth Rate (%) | 20.8/ 2.5% |
| Number of Major Metropolitan Areas | 11 |
| Size of Middle Class (Millions) / Growth Rate (%) (estimate) | 17 / 2.5% |
| Per Capita Gross Domestic Product (US Dollars) | \$9,827 |
| Unemployment Rate (%) | 3.1% |
| Per Capita Food Expenditures (U.S. Dollars) | \$1,500 |
| Percent of Female Population Employed | 52.4% |
| Exchange rate (US\$1 = X.X local currency) (Apr 28, 2014) | US\$ = 3.271 RM |

TABLE B. Consumer Food & Edible Fishery Products

| Malaysia Imports (In Millions of Dollars) CONSUMER-ORIENTED AGRICULTURAL TOTAL | Imports from the World | | | Imports from the U.S. | | | U.S Market Share | | |
|---|------------------------|-------------|-------------|-----------------------|------------|------------|------------------|----------|----------|
| | 2011 | 2012 | 2013 | 201 1 | 201 2 | 201 3 | 201 1 | 201 2 | 201 3 |
| CONSUMER-ORIENTED AGRICULTURAL TOTAL | 4973 | 5333 | 6023 | 444 | 470 | 534 | 9 | 9 | 9 |
| Snack Foods (Excl. Nuts) | 214 | 229 | 243 | 11 | 13 | 13 | 5 | 6 | 5 |
| Breakfast Cereals & Pancake Mix | 29 | 28 | 23 | 2 | 3 | 3 | 9 | 11 | 13 |
| Red Meats, Fresh/Chilled/Frozen | 554 | 603 | 693 | 1 | 1 | 0 | 0 | 0 | 0 |
| Red Meats, Prepared/Preserved | 10 | 13 | 17 | 1 | 0 | 0 | 10 | 0 | 0 |
| Poultry Meat | 106 | 109 | 110 | 2 | 1 | 0 | 2 | 1 | 0 |
| Dairy Products (Excl. Cheese) | 786 | 816 | 985 | 122 | 104 | 137 | 16 | 13 | 14 |
| Cheese | 66 | 77 | 83 | 5 | 6 | 4 | 8 | 8 | 5 |
| Eggs & Products | 3 | 4 | 4 | 0 | 0 | 0 | 0 | 0 | 0 |
| Fresh Fruit | 280 | 326 | 410 | 40 | 40 | 51 | 14 | 12 | 12 |
| Fresh Vegetables | 573 | 554 | 654 | 11 | 16 | 14 | 2 | 3 | 2 |
| Processed Fruit & Vegetables | 324 | 348 | 398 | 61 | 71 | 80 | 19 | 20 | 20 |
| Fruit & Vegetable Juices | 67 | 76 | 68 | 27 | 28 | 18 | 40 | 37 | 26 |
| Tree Nuts | 55 | 61 | 63 | 16 | 17 | 20 | 29 | 28 | 32 |
| Wine & Beer | 126 | 151 | 165 | 5 | 3 | 5 | 4 | 2 | 3 |
| Nursery Products & Cut Flowers | 11 | 13 | 13 | 0 | 0 | 0 | 0 | 0 | 0 |
| Pet Foods (Dog & Cat Food) | 75 | 84 | 95 | 10 | 12 | 12 | 13 | 14 | 13 |
| Other Consumer-Oriented Products | 1694 | 1841 | 1999 | 131 | 156 | 177 | 8 | 8 | 9 |
| FISH & SEAFOOD PRODUCTS | 930 | 1000 | 996 | 10 | 14 | 30 | 1 | 1 | 3 |
| Salmon | 24 | 25 | 38 | 0 | 0 | 0 | 0 | 0 | 0 |
| Surimi | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Crustaceans | 274 | 291 | 244 | 1 | 1 | 2 | 0 | 0 | 1 |
| Groundfish & Flatfish | 102 | 113 | 104 | 0 | 0 | 0 | 0 | 0 | 0 |
| Molluscs | 66 | 63 | 79 | 3 | 3 | 3 | 5 | 5 | 4 |
| Other Fishery Products | 464 | 508 | 530 | 6 | 9 | 24 | 1 | 2 | 5 |
| AGRICULTURAL PRODUCTS TOTAL | 1841 | 1858 | 1726 | 111 | | | | | |
| AGRICULTURAL, FISH & FORESTRY TOTAL | 6 | 3 | 1 | 6 | 944 | 950 | 6 | 5 | 6 |
| | 1994 | 2017 | 1882 | 115 | | 102 | | | |
| | 7 | 9 | 2 | 4 | 996 | 2 | 6 | 5 | 5 |

Source: Global Trade Atlas.

**Table C: Top 5 Suppliers of Consumers Foods &
Top 10 Suppliers of Edible Fishery Products**

CONSUMER-ORIENTED AGRICULTURAL TOTAL – (\$1,000)

| RANK | IMPORT MARKET | 2011 | 2012 | 2013 |
|-------------|----------------------|------------------|------------------|------------------|
| 1 | CHINA | 825,290 | 797,796 | 909,833 |
| 2 | NEW ZEALAND | 584,957 | 607,613 | 695,588 |
| 3 | INDIA | 609,567 | 613,579 | 694,310 |
| 4 | UNITED STATES | 444,260 | 469,513 | 533,754 |
| 5 | THAILAND | 391,093 | 438,039 | 525,531 |
| | OTHERS | 2,117,494 | 2,406,783 | 2,664,398 |
| | TOTAL | 4,972,661 | 5,333,325 | 6,023,414 |

FISH & SEAFOOD PRODUCTS – (\$1,000)

| RANK | IMPORT MARKET | 2011 | 2012 | 2013 |
|-------------|----------------------|----------------|------------------|----------------|
| 1 | CHINA | 301,987 | 304,948 | 279,203 |
| 2 | INDONESIA | 155,303 | 184,202 | 187,328 |
| 3 | THAILAND | 146,290 | 165,883 | 142,934 |
| 4 | VIETNAM | 50,367 | 55,084 | 67,761 |
| 5 | INDIA | 39,736 | 34,879 | 50,652 |
| 6 | MYANMAR | 39,405 | 38,694 | 38,404 |
| 7 | NORWAY | 18,232 | 21,570 | 30,095 |
| 8 | UNITED STATES | 10,101 | 13,838 | 29,673 |
| 9 | JAPAN | 16,881 | 23,048 | 24,387 |
| 10 | CHILE | 9,682 | 13,178 | 20,093 |
| | OTHERS | 141,898 | 144,968 | 125,239 |
| | TOTAL | 929,881 | 1,000,291 | 995,768 |

Source: Global Trade Atlas.

END OF REPORT

