

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Singapore

Food Service - Hotel Restaurant Institutional

HRI Update 2014

Approved By:

Chris P. Rittgers

Prepared By:

Irawati Sugita

Report Highlights:

Singapore's Hotel, Restaurant, and Institutional (HRI) sector is performing well, is very dynamic, and is highly competitive, with a diverse array of hotels and restaurants. Driven by strong demand from business travelers and economic growth in general, the HRI industry is expected to continue to grow, offering opportunities for U.S. exporters. Leading prospects include prime beef cuts, dairy products, specialty fruits, frozen potato products, sauces, wine, and fruit juices.

Post:

Singapore

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SECTION 1. MARKET SUMMARY

Singapore's HRI industry is extremely competitive, with the number of food service outlets and sales growing about 3 and 4 percent, respectively. This is being fueled by tourism, with the number of visitors growing about 7 percent annually, approaching 16 million annually, which is more than double the population. The two integrated resorts, Marina Bay Sands and Resort World Sentosa), are top destinations. Travel accommodation sales are growing about 3 percent per year, with 13 new hotels and an additional 2900 hotel rooms added in 2013. Hotel and accommodations across the price spectrum are performing well, with occupancy rates for all classes of hotels high.

Singaporeans are increasingly adopting a lifestyle of eating away from home more frequently, with recent surveys suggesting more than half the population eating out for 8 meals per week. This trend is leading to expansion in the Food and Beverage (F&B) industry. F&B consists of over 6500 establishments, which includes restaurants, cafes/coffee houses/snack bars, food courts/coffee shops/eating houses, fast food restaurants and caterers. In terms of total revenue, restaurants account for about 37 percent, fast food outlets 13 percent, caterers 12 percent, and coffee shops/small cafes/food courts the remainder. This data does not include the numerous Hawker Stalls that can be found throughout Singapore. In terms of fast food franchises, McDonalds is the dominant player, followed by KFC and Subway.

Key Trends in the HRI sector:

- The tight labor market has a significant impact on the industry, particularly F&B. There is also a much turnover in the sector, and a great dependence on foreign labor. While the sector's overall performance is strong, increasing labor costs amid tighter government regulations on guest workers is a continuous challenge.
- Online service: the industry has introduced more shopping options for their consumers. For example, McDonald's and Pizza Hut have both websites that allow consumers to order online and also choose to pick up or have their orders delivered.
- Food and beverage pairing menus and also co-branding promotions are becoming more popular in the fine dining and mid-range dining outlets.
- Rental rates continue to be high.
- Increased interest in healthier and "natural" foods. In response, new innovative healthy meals and beverage menus are being introduced.

Advantages	Challenges
<ul style="list-style-type: none"> • U.S. products are known to be high quality, healthier and consistently available. • Growing popularity of convenience and fast foods – especially U.S. fast foods - favors the use of these chains’ existing procurement systems which source food ingredients from the U.S. • 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, cafes, fast food outlets and hotel chains are increasing. • Singapore’s HRI sector is dynamic, thriving and expected to continue growing in the next few years. • Singapore is one of the wealthiest markets in the region and also has one of the most liberal markets in the world. 	<ul style="list-style-type: none"> • Imported / U.S. products are generally more expensive. • There is a rising trend in Singapore on eating “healthier” food. Justified or not, fast food is often associated with eating “empty calories” and “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 on the developing crisis / economy slowdowns in Europe / China that would have negative impacts on Singapore’s economy.

SECTION II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

In terms of market access, importers in general do not encounter significant trade barriers. Essentially, Singapore has no applicable tariffs/duties on food and most beverage products. Finding the right partner (importers/distributors) to distribute or represent U.S export products in the market is a key consideration to success in Singapore. It is important for U.S. exporters to appoint reliable local importers/agents to help them distribute and market their products, as well as keeping them abreast of new import requirements / regulations. U.S. exporters should also be familiar with local tastes and work closely with chefs and F&B professionals to modify their food products if necessary.

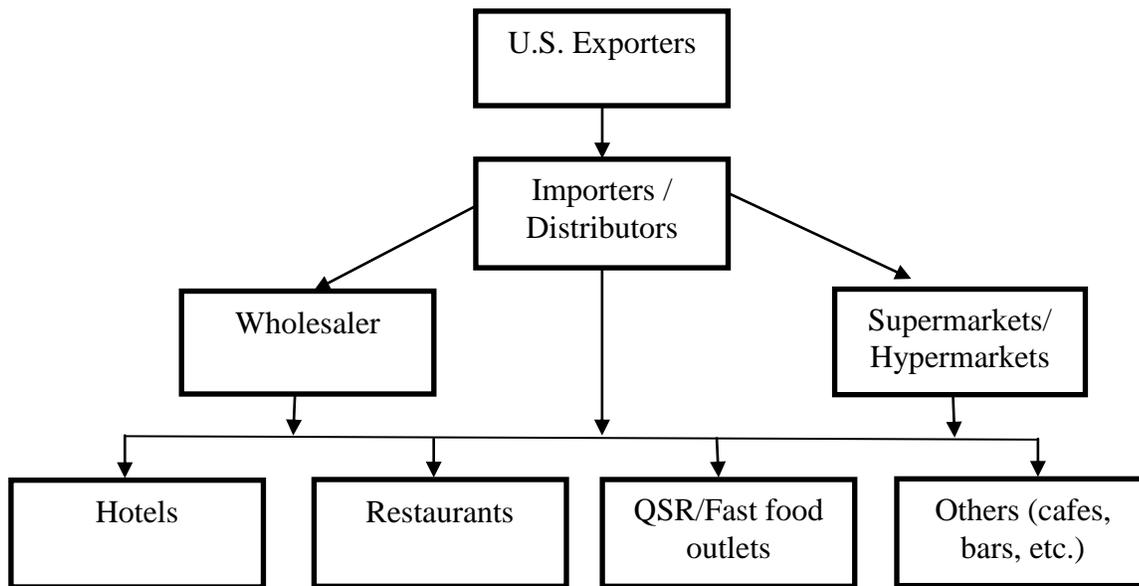
In selecting importers/distributors to partner with, some details U.S. exporters should consider are as follows:

- Their “reputation” in the market
- Their financial strength and business volume
- Their business connections and coverage
- Their interest and commitment in carrying imported U.S. products
- Their marketing campaigns and tie-ups
- Their policies on purchasing new, basic, premium and niche items

Other details U.S. exporters should consider as well:

- Price competitiveness of U.S. products versus brands available in the market.
- Packaging size and quality.
- U.S. products that can be accepted as alternatives/substitutes versus competing products.
- U.S. products that can fit into local food culture.
- The level of promotion and commitment to support their products and consumer education for launch and development of new products.
- Ability to meet purchasing requirements.

B. MARKET STRUCTURE



Singapore's distribution system for imported goods is fairly simple; and foods/beverages are mainly distributed via importers/distributors. However, in some cases, U.S. chains or upscale HRI operators import directly from U.S. exporters. For example, Quick Service Restaurants may have exclusive contracts with importers/distributors. Products such as frozen potatoes, fried chicken coating mix and cheese for pizza are imported into the country so as to ensure the final products meet strict franchise standards. Also, for small and medium HRI operators, they typically purchase products through local agents, wholesales and supermarkets.

C. SUB-SECTOR PROFILES

MAJOR INTERNATIONAL CHAIN HOTELS & RESORTS IN SINGAPORE

Imported Food Products/Ingredients Consumption: purchasing agents are mainly importers/ distributor. Singapore has also lower to mid-scale hotels. In general, these types of hotels are not major purchasers of imported/U.S. foods products.

Hotel Chain	Hotel Names	F&B establishments
Fairmont Raffles Hotels International	Swissotel the Stamford	International cuisine, Asian cuisine, Western cuisine, fine dining, cafes, 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
ParkRoyal Hotels	Parkroyal Hotels: Beach Road, 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	International / Mediterranean cuisine, Asian cuisine, coffee house, bars and lounges.
Marriott International	Singapore Marriott Hotel, The Ritz Carlton Millenia Singapore	International cuisine, alfresco grill, Asian cuisine, deli, and lounge.
Miliennium 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 Resorts	Regent Singapore	International cuisine, Asian 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.

Sources: various websites

MAJOR RESETAURANTS IN SINGAPORE

Other types of food establishments include hawker centers, coffee shops, and food courts. In general they offer cheaper food alternatives and are not purchasers of imported foods / beverages.

Company (Product Type)	Sales (2013)	Outlet Name, Type, & Number of Outlets	Locations	Purchasing Agents
<p>Crystal Jade Culinary Concept Holdings</p> <p>The local restaurant chain was bought over in 2014 by Paris-based luxury group LVMH Moët Hennessy Louis Vuitton's private equity arm, L Capital Asia. It has signed a deal to buy "over 90 per cent" of Crystal Jade Group.</p> <p>The restaurant chain serves mainly Cantonese food.</p>	<p>Turnover in 2009 was estimated at \$185 million</p>	<p>Brands include fine dining, family restaurant, bakery & café, and casual dining. Each product / restaurant has its own name; e.g. for casual dining, it is called Crystal Jade Kitchen.</p> <p>More than 100 outlets – also overseas.</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>	<p>Importers / distributors</p>

<p>Sakae Holdings Ltd. Flag ship brand of Apex-Pal International Ltd.</p> <p>The local restaurant chain offers Japanese sushi ala carte and via a conveyor belt; and caters to mainly low to mid- level pricing markets. Also has catering services through its Nouvelle Events brand</p>	<p>Net profit in 2013 was \$ 4,270,000</p>	<p>40 Sakae Sushi outlets in Singapore – about 15 in the suburbs. Also seven outlets in Malaysia, one in Thailand, six in China, three in the Philippines, and four in Indonesia.</p> <p>Other brands include Sakae Teppanyaki (expensive dining to the masses, live seafood); Sake Express (for people on the go); Senju (mid to upscale Japanese restaurant); Hei Sushi (certified halal), Sachi (healthy casual dining); and Crepes and Cream (sweet and savory crepes).</p>	<p>Singapore</p> <p>Regional countries: Indonesia, Malaysia, Thailand, China and Philippines</p>	<p>Importers / distributors, direct.</p>
<p>Old Chang Kee Ltd An established local snack chain offering local snack including curry puff. The products were certified halal in 2005.</p> <p>The company also operates mobile kitchen / catering services (brand “O’My Darling”)</p>	<p>Net profit in 2013 was \$ 3,843,000.</p>	<p>72 Old Chang Kee outlets are located in Singapore, and overseas: three in China, two in Malaysia, four in Indonesia and three in the Philippines.</p> <p>Other brands include Take 5 (local food casual), Pie Kia (outlets offer pies), Dip n Go (snack food with dips), Mushroom café (Al fresco local food) and Curry Times (curry themed restaurant).</p>	<p>Singapore</p> <p>Overseas: China, Malaysia, Indonesia and the Philippines.</p>	<p>Importers / distributors / direct.</p>
<p>Tung Lock Group</p> <p>Owns and operates a number of mainly high end / mid-scale Chinese restaurants. The local group also</p>	<p>Despite revenue of \$63,107,000 in 2013, the group experienced a nominal loss</p>	<p>The group owns and manages over 40 restaurants in Singapore, China, Japan, India and Indonesia. They have several brands – each unique to the type of</p>	<p>Singapore</p> <p>Overseas: China, Japan, India and Indonesia.</p>	<p>Importers / distributors.</p>

<p>does management consultancy for the F&B industry; offers franchise opportunities for its outlets; and also manufactures festive food and dim sum.</p> <p>It acquired Paddyfields Thai Restaurant and managed Pine Valley; and also acquired franchising rights for Garuda Padang Cuisine. In collaboration with The Seafood International Market & Restaurant, Palm Beach Seafood and Jumbo Seafood, it opened Singapore Seafood Republic at Resortworld Sentosa in 2010.</p>	<p>of \$ 2,452,000.</p>	<p>Chinese cuisine offered and also its unique interior design – including Lao Beijing, Tung Lock Seafood, Tung Lock Signature, etc.</p>		
<p>Imperial Treasure Restaurants Group Pte Ltd</p> <p>The local group offers Chinese cuisine and caters to the mainly high-end and also mid-scale markets.</p> <p>The owner of Imperial Treasure used to be business partner with owner of Crystal Jade; in fact they are brothers-in-law. But they went their</p>	<p>N/A</p>	<p>The Group has 23 restaurants mainly in Singapore and one in Shanghai.</p> <p>The brands are subject to the types of food / cuisine they offer; e.g. Imperial Treasure Noodle and Congee House, Imperial Seafood restaurant, Imperial Treasure Teochew Cuisine, etc.</p>	<p>Singapore</p> <p>Overseas: China</p>	<p>Importers / distributors/.</p>

separate ways due to differences in philosophies, etc.				
<p>McDonald's Singapore – wholly owned by McDonald's Corporation, Oak Brook, U.S.</p> <p>Like other McDonald's worldwide, the Singapore branch primarily sells hamburgers, cheese burgers, French fries, breakfast items, soft drinks, milkshakes and desserts. Also, in response to the popularity of healthier products, the menu has expanded to include salads, wraps and fruit smoothies.</p> <p>The QSR opened its first restaurant in Singapore in 1979. Today, it employs around 9000 employees and serves 1.2 million customers each week. It serves halal food.</p>	N/A	<p>McDonald's Singapore has grown to over 120 restaurants across the country.</p> <p>The QSRs typically offer counter service and in a few outlets also drive through service. The outlets are usually located in shopping malls.</p> <p>Several locations also include McCafes – McD's Starbuck-styled coffee shops offering high quality coffee and cakes.</p>	Singapore	Importers / distributors
<p>International Coffee & Tea LLC – privately owned by Singapore's Sassoon family.</p> <p>The coffee chain is famous for its ice</p>	N/A	<p>The coffee chain has 16 outlets in Singapore. The outlets are known as "Coffee Bean & Tea Leaf"</p> <p>The outlets are usually located in shopping</p>	Singapore	Importers / distributors.

<p>blended coffee and tea drinks, hot coffee / tea drinks. It also offers baked goods and salad / sandwiches/ pasta. The chain opened its first outlet in Singapore in 1996. In 1998, Singapore’s Victor and Sunny Sassoon bought the Asian franchise rights from the original U.S. owners, the Hyman family. In 1998, the Sassoons and also Severin Wunderman bought the parent company and took it global. It serves halal and kosher food.</p>		<p>malls.</p>		
<p>Burger King – Rancak Selera Sdn Bhd – current BK franchisee in Malaysia – acquired a 100% stake in Burger King Singapore in 2012.</p> <p>The QSR opened in 1982 and primarily sells hamburgers, cheese burgers, French fries, salad, breakfast items, soft drinks, milkshakes and desserts. It serves halal food.</p>	<p>N/A</p>	<p>There are currently 40 “Burger King” outlets across the island.</p> <p>The outlets are usually located in shopping malls.</p>	<p>Singapore</p>	<p>Importers / distributors.</p>
<p>Carl’s JR – CKE Restaurants Inc. entered into a franchise agreement</p>	<p>N/A</p>	<p>There are currently six “Carl’s Jr.” outlets across the country.</p>	<p>Singapore</p>	<p>Importers / distributors.</p>

<p>with Aspac F&B Pte Ltd in 2004 to open Carl's Jr restaurants in both Singapore and Malaysia.</p> <p>The QSR offered premium quality charbroiled burgers, chicken burgers, fries and dessert.</p>		<p>The outlets are usually located in shopping malls.</p>		
<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 10 years absence attempts. It serves halal food.</p>	N/A	<p>There are currently 12 “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.</p> <p>KFC Singapore opened its first outlet in 1977, and serves fried chicken, burgers, wraps and desserts. It serves halal food.</p>	N/A	<p>There are currently 84 “Kentucky Fried Chicken” outlets across the country.</p> <p>The outlets are located mainly in shopping malls.</p>	Singapore	Importers / distributors.

<p>Long John Silver – Yum sold Long John Silver's to LJS Partners LLC, led by a group of franchisees and other investors.</p> <p>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 currently 22 “Long John Silver” outlets across the island.</p> <p>The outlets are mainly located in shopping malls.</p>	Singapore	Importers / distributors.
<p>Pizza Hut – QSR Brands (M) Holdings Sdn Bhd also operates Pizza Hut outlets in Singapore – and Malaysia too.</p> <p>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 currently 23 “Pizza Hut” outlets across the country.</p> <p>The outlets are mainly located in shopping malls.</p>	Singapore	Importers / distributors.
<p>Starbucks Coffee Singapore – It is a wholly owned subsidiary of 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</p>	N/A	<p>“Starbucks” Singapore opened its 100th outlet in the country in February 2014.</p> <p>The outlets are mainly located in shopping malls and also office buildings.</p>	Singapore	Importers / distributors.

pastries. .				
<p>Wendy's - Wendy's/Arby's International signed a franchise agreement with Singapore's Kopitiam Group in 2009 (the largest food service management company in Singapore) to open 35 outlets in the next decade.</p> <p>The burger QSR offers burgers, as well as salad, baked potatoes and dessert.</p>	N/A	<p>There are currently 10 "Wendy's" outlets across Singapore.</p> <p>The outlets are mainly located in shopping malls and a few of them are in office area / buildings.</p>	Singapore	Importers / distributors.
<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 also coffee / tea beverages.</p>	N/A	<p>There are currently three "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.
Chili's (R) Grill &	N/A	There are currently two	Singapore	Importers /

<p>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.</p> <p>Chilli’s opened its outlets in 2009 after years of absence from Singapore. It is a casual dining restaurant that offers Tex-Mex cuisine.</p>		<p>“Chili’s” outlets across the country.</p> <p>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.</p>		<p>distributors.</p>
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Sources: Websites

Other details on the restaurant industry in Singapore:

- Other returning restaurant franchises include Dunkin Donuts (Golden Donuts, the master franchise for Malaysia and Singapore); Texas Fried Chicken (local franchise: Select Group); and TGIF Friday (local franchise: ChasWood Resources).
- The above lists are by no means exhaustive. In addition to other international hotels and restaurants, there are also other local hotel chains and restaurants/bakeries. In general, these establishments do not usually import U.S. food and beverage products/or in significant amounts.
- In general, chain fast foods and casual dining restaurants are suitable and accessible to customers in all income groups because of their affordable packages and prices, delivery services, creative menus and convenience: easy access due to outlets scattered across the island and availability of on-line ordering.
- Full service restaurants promote group events such as televised sports and are increasingly working with credit card companies to offer discounts/special promotions.

MAJOR INSTITUTIONAL

- In Singapore, SATS is the leading provider of gateway services and food solutions in the region;

and has operations at 35 airports in 10 countries. It caters to the needs of various sectors including aviation; food; hospitality; and 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).

In terms of catering services, SAT provides both inflight and commercial catering. For inflight catering, SATS provides 80 thousand 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.

- 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

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Dairy Net Imports: 349,486 tons \$1,146,378,939	<ol style="list-style-type: none"> 1. New Zealand - 31.54% 2. Australia – 19.70% 3. U.S.A. – 8.09% 4. Malaysia – 5.92% 	NZ, Australia and regional countries have competitive pricing and geographic proximity.	<p>Local dairy companies are strong competitors and have brand / name familiarity.</p> <p>Domestic manufactured food products are fairly limited for some categories such as cereals.</p>
Fresh fruits group Net Imports: 415,538 tons \$ 485,680,123	<ol style="list-style-type: none"> 1. U.S.A. - 18.43% 2. China – 14.84% 3. Malaysia – 10.42% 4. South Africa – 	The U.S. dominates the fresh fruit market because of its competitiveness on quality, some promotional support, branding and supply capacity.	In general, Singapore does not produce fresh fruits.

	10.41%	Other top key suppliers compete mostly on price competitiveness and, in some cases, also geographic proximity.	
Fresh vegetable group Net Imports: 502,883 tons \$ 435,842,769	<ol style="list-style-type: none"> 1. Malaysia: 36.78% 2. China – 26.45% 3. Australia – 6.97% 4. Thailand – 4.96% 7. U.S.A. – 4.27% 	The top key suppliers compete mostly on price competitiveness and geographic proximity.	Singapore does not produce fresh vegetables or does not produce products that compete with U.S. vegetables.
Processed fruits total Net Imports: 252,976 ton \$110,728,377	<ol style="list-style-type: none"> 1. Indonesia – 26.80% 2. Thailand – 17.24% 3. U.S.A. – 13.98% 4. China -12.54% 	The regional countries offer competitive pricing and also have geographic proximity.	Singapore has limited processed fruit products manufactured locally.
Processed vegetables and pulses total Net Imports: 100,559 ton \$163,811,711	<ol style="list-style-type: none"> 1. China – 34.35% 2. U.S.A. – 26.27% 3. Thailand – 5.58% 4. Malaysia – 5.02% 	<p>China and regional countries offer competitive pricing and also have geographic proximity.</p> <p>The U.S. is the leading supplier of frozen potatoes, sweet corn and vegetables.</p>	Singapore is only a small producer of processed vegetables products.
All beef and offal Net Imports: 40,657 tons \$216,579,205	<ol style="list-style-type: none"> 1. Australia – 41.01% 2. Brazil – 20.15% 3. New Zealand – 15.33% 4. U.S.A. – 9.45% 	<p>NZ beef tends to dominate in food service. Both NZ and Australian beef are considered as good quality and price competitive.</p> <p>Brazil competes mainly on price considerations.</p> <p>U.S beef caters more to the high end / western restaurants / restaurants at</p>	Singapore does not produce beef.

		international chain hotels. It is not generally seen as price competitive.	
All pork and offal Net Imports: 91,798 tons \$309,265,881	<ol style="list-style-type: none"> 1. Brazil – 31.24% 2. Australia – 14.30% 3. U.S.A. – 12.10% 4. Netherlands – 11.59% 	Brazilian and Australian pork compete mostly on price considerations. Australia has also geographic proximity.	Singapore’s slaughtered live pigs from Indonesia are usually sold at wet / traditional markets.
Poultry meat group (including offal) Net Imports: \$280,314,504	<ol style="list-style-type: none"> 1. Brazil - 74.36% 2. U.S.A. - 14.30% 3. Argentina – 6.14% 4. France - 1.16% 	Brazil competes on price considerations and its products are mostly chickens – as is Argentina. Besides chickens, the U.S. also supplies turkey meat and France supplies ducks / geese.	Singapore’s slaughtered live chickens from Malaysia are usually sold in markets and supermarkets.
Fish and seafood Net Imports: 197,051 tons \$ 1,009,497,023	<ol style="list-style-type: none"> 1. Malaysia – 13.35% 2. Indonesia – 12.93% 3. China – 10.84 4. Vietnam – 9.83% <ol style="list-style-type: none"> 13. U.S.A. – 1.89% 	This market is dominated by regional countries and China that have geographic proximity and price competitiveness.	Singapore is a not a major fishing nation or food producer.
Non-alcoholic beverages total Net Imports: \$ 500,615,424	<ol style="list-style-type: none"> 1. Malaysia – 41.87% 2. U.S.A. – 9.22% 3. Indonesia – 8.98% 4. Thailand – 6.58% 	Malaysia / regional countries dominate the non-alcoholic beverage group, mainly in fruit juices products due to price competitiveness and geographic proximity. While U.S. non-alcoholic beverage products are considered to be of high quality, they are also known to be pricier.	Singapore has a relatively strong sector in the production of fruit juices. Notable companies include F&N, Malaysia Dairy Industries and Pokka Singapore.
Wine and Beer Net Imports: 181,885,344 L	<ol style="list-style-type: none"> 1. France – 51.75% 2. Malaysia – 	It is a fragmented market with a broad range of products and high profile	For beer products, Asia Pacific Breweries dominates the

\$ 728,518,067	8.05% 3. Australia – 6.92% 4. Vietnam – 4.90% 7. U.S.A. – 2.73%	promotions. The U.S. competes both on the “mass market” and premium products.	Singapore market with its high profile and well distributed beers/ stouts. Singapore does not produce wines and spirits.
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Source: Global Trade Atlas

SECTION IV. BEST PRODUCT PROSPECTS

Category A: Products Present in the Market Which Have Good Sales Potential

Product Category	Market Size in ton, (Volume) (2013)	Imports (2013)	% Change 2013/ 2012	Key constraints over market development	Market attractiveness for U.S.A.
Breakfast Cereal and other breakfast products	1,502	\$ 9,006,299	2.11%	The market is dominated by several established brands including European brand Nestle, and also U.S. brands Kellogg’s and Post.	An attractive market for long term development due to changing eating habits as the younger generation is consuming more cereals. Also, cereal is a common breakfast item for most HRI.
Fresh fruits	39,805	\$89,522,718	7.56%	Strong competition from regional countries that typically offer cheaper alternatives.	Generally attractive due to high demand for U.S. products.
Other	3520	\$13,841,510	95.16%	Price sensitivity	Attractive as demand

prepared/ preserved meat (sausage, others)				and also competition (mainly on price) from Brazil and E.U.	is still growing for such food products; but price has to be competitive.
Processed Vegetables and pulses	29,508	\$43,041,082	24.43%	Competition from mainly China and regional countries on price and geographic proximity considerations.	Attractive as demand is still relatively high especially for frozen potatoes, sweet corn and vegetables.

Source: Global Trade Atlas

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

Product Category	Market Size in ton, (Volume) (2013)	Imports (2013)	% Change 2013/ 2012	Key constraints over market development	Market attractiveness for U.S.A.
Cheese, group	1,604	\$8,172,557	29.91%	Competition from mainly Australian and NZ cheese.	Growing popularity of western food. Cheese is also a common food item / ingredient in HRI establishments.
Non-alcoholic beverages total	3,089 tons 10,682,461 L	\$46,180,484	4.41%	Competition from mostly regional countries on price and geographic proximity considerations.	Increasing health awareness, thus more demand for fruit /vegetable juices. Also increasing popularity of coffee chains such as Starbucks, Coffee Bean & Tea Leaf, Gloria Jean, Spinelli's etc.
Wine and beer	5,414,515 L	\$19,911,987	28.78%	Market is fairly fragmented. Also, for beer products, Asia Pacific	Increasing popularity of wine and beer products in Singapore.

				Breweries is quite dominant in the market.	The U.S. competes both on the “mass market” and premium products.
Fats and Oil	7026 T	\$23,586,571	51.84%	Strong competition from mainly regional countries that offer a wide variety of products and competitive pricing	Attractive especially for healthier oils and fats.

Source Global Trade Atlas

Category C: Products Not Present Because They Face Significant Barriers

Product Category	Market Size in ton, (Volume) (2013)	Imports (2013)	% Change 2013/ 2012	Key constraints over market development	Market attractiveness for U.S.A.
All beef / offal	11771 T	\$20,463,724	25.66%	Continuing regulatory barriers. Also, competition from mainly the three traditional suppliers (Australia, Brazil and New Zealand) with their good distribution channels and brandings.	Attractive for niche sectors especially for the premium market.

Source: Global Trade Atlas

SECTION V. 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

END OF REPORT.