The Food and Beverage Market Entry Handbook: Singapore

a practical guide to the market in Singapore for European agri-food products
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I. THE FOOD AND BEVERAGE MARKET ENTRY HANDBOOK: SINGAPORE

This Handbook is intended to act as a reference for those agri-food producers planning for, or in the process of entering, the Singaporean market. This Handbook provides step-by-step guides on the operationalization of the market in Singapore, including relevant information such as analysis of the Singaporean market for different product categories, market access and market entry procedures, IP protection, referrals to professional buyers and a signposting and referral system providing useful contacts and ways to penetrate the Singaporean market.

i. How to use this handbook

Depending on your stage of market entry, company profile, and product range, different sections within this handbook will be helpful to a different extent for your business strategies.

For those wishing to learn more about the Singaporean food and beverage market in general Section 2 provides an overview of the business climate. This section contains information on: the food and beverage market, market access procedures, customs procedures, SPS and labelling requirements, and the status of Geographical Indications and Intellectual Property protection. The information contained within this section is of a general nature and so may not be relevant for those in the more advanced stages of market entry.

If Section 2 got you interested in the market, but you want to find out more information relevant for your product, then check out the Market Snapshots for Selected Products. This content illustrates the market situation, market access procedures, SPS requirements etc. specific for this product or product category. This information will provide more industry specific information to consider as part of any market entry or market expansion strategies.

If you already have decided that the Singaporean market is where you want to be, but you need some support, then the Support Services Directory can point you in the right way. Contact information for a service provider, business facilitation support organisation, or for a business contact, could help put you in touch with the right parties who can help you building your brand in the Singaporean market.
1. SINGAPORE FACT SHEET

Singapore Fact Sheet

Country Profile

Location: Singapore is an island city-state, it lies south to the southernmost tip of continental Asia and peninsular Malaysia, with Indonesia’s Riau Islands to the south.

Capital: Singapore

Population (est.): 5.5 million.

Ethnic Groups: Chinese 74.1%, Malay 13.4%, Indian 9.2%, Others 3.3%

Religions: Buddhist, Christian, indigenous beliefs, Muslim and Hinduism.

Language: Singapore has four official languages: English, Malay, Mandarin Chinese, and Tamil.

Weather: tropical rainforest climate. Temperature in November: around 27°C

Economy Overview

GDP: US$ 330.7 billion

GDP per capita: US$ 55,150 (high-income economy)

GDP growth: 2% Currency: Singapore Dollar (SGD)

Inflation: 0.5% Exchange Rate: EUR 1 = SGD 1.49

Having a democratic system since its independence, the country provides the world’s most business-friendly regulatory environment for local entrepreneurs and is ranked among the world’s most competitive economies. In the decades after independence, Singapore rapidly developed from a low-income country to a high-income country. GDP grew with an average of 7.7% since independence; in the first 25 years growth topped 9.2%. Rapid industrialization took momentum in the 1960s. By the early 1970s, Singapore had reached full employment. In the 1980s, Singapore had joined the ranks of Hong Kong, South Korea and Taiwan among the newly industrializing countries in Asia.

Culture and Customs

- The concepts of group, harmony, and mutuality are more important than that of the individual. Singaporeans claim they are an egalitarian society, yet they retain strong hierarchical relationships.
- Singapore is a multi-ethnic society which exists in a cosmopolitan metropolis.
- Singaporeans are group dependent and rely on facial expression, tone of voice and posture to tell them what someone feels. They tend to be subtle, indirect and implicit in their communications.
- Rather than say ‘no’, they might say, ‘I will try’, or ‘I’ll see what I can do’
- This is a group-oriented culture, so links are often based on ethnicity, education or work. Once you are recognized as part of the group, you will be accepted and expected to obey the unwritten rules of the group.

Safety and emergency contact

Be aware of the risk of street crime, particularly bag snatching. Take particular care of your passport. Leave valuables in a hotel safe if possible. Don’t leave valuables in unattended vehicles. Violent crime is rare; it is convenient to be aware of air pollution and dengue fever.

Police phone number: 999
Ambulance and rescue: 995

Business Etiquette

- Greetings will follow a strict protocol often based on both the ethnic origin and age of the person.
- Younger people or those who work in multi-national companies may have adopted the western concept of shaking hands with everyone but this is not the case with older or more reserved Singaporeans.
- When being introduced to someone of the opposite sex, nodding the head and smiling is usually sufficient.
- Business in Singapore is more formal than in many western countries.
- People observe a strict chain of command
- Personal relationships are the cornerstone of all business relationships. Relationships take time to develop.
- You must be patient as this indicates that your organization is here for the long-term and is not looking only for short-term gains.
- Most Singaporeans are soft-spoken and believe a calm demeanour is superior to a more aggressive style.
- Appointments should be made 2 weeks in advance, whenever possible.
- Punctuality is a virtue.
- Since questioning authority is a taboo, it is important to encourage questions when after making a presentation.
- Singaporeans give a respectful pause of up to 15 seconds before answering a question. Do not start speaking too quickly or you will miss the answer.
- Singaporeans are tough negotiators on price and deadlines.
- Examine business cards carefully before putting them in a business card case. Treat business cards with respect.
1.1 Key economic figures "at a glance"

<table>
<thead>
<tr>
<th>Free-market economy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GDP</strong>&lt;br&gt;(Billions of Euros)</td>
</tr>
<tr>
<td>-----------------------------</td>
</tr>
<tr>
<td>GDP</td>
</tr>
<tr>
<td><strong>Real annual GDP growth</strong></td>
</tr>
<tr>
<td>Forecast GDP growth for 2016-2018</td>
</tr>
<tr>
<td>GDP by sector</td>
</tr>
<tr>
<td>GDP per capita&lt;br&gt;(EURO)</td>
</tr>
<tr>
<td>-----------------------------</td>
</tr>
<tr>
<td>GDP per capita</td>
</tr>
<tr>
<td><strong>Inflation</strong></td>
</tr>
<tr>
<td>Principal exports&lt;br&gt;&amp; main destinations Jan-Apr 2016</td>
</tr>
<tr>
<td>Principal imports&lt;br&gt;and main regions Jan-Apr 2016</td>
</tr>
</tbody>
</table>

In 2015, the wholesale and retail trade sector accounted for 15.6% of GDP; construction accounted for 5.2%; the manufacturing accounted for 19.8%; transportation and storage accounted for 7.4%; finance and insurance accounted for 12.6%; and business services accounted for 15.5%.

1.2 Food trade statistics, specifically showing opportunities and existing or likely competitors to EU food exports

Consumer spending on food and beverages is expected to grow 5 % annually from 2016 through 2018, which will drive continued growth in the retail foods sector. In 2014, expenditure on food and non-alcoholic beverages accounted for 7% of total consumer expenditure, while expenditure on alcoholic beverages, tobacco and narcotics accounted

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for 2%.\textsuperscript{3} It is also important to note that spending on restaurants and hotels accounted for 9% of overall consumer expenditure.

The Singaporean market provides significant prospects for market expansion for the following products: breakfast cereals, dairy products, fresh fruits, edible nuts, fish and seafood, pork, fresh vegetables, snack foods and wine.\textsuperscript{3} Singaporeans are open to products from developed countries that are of a high quality and are value-for-money. There are 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.

\textit{1.3 General information on distribution and logistics infrastructure, ease of doing business, etc.}

Singapore boasts excellent transportation infrastructure. Businesses can tap into Singapore’s excellent shipping and air links, as well as its first-class telecommunications and banking facilities to manage their global operations from Singapore. It is considered a top global transportation hub. With connections to over 600 ports in 120 countries, Singapore boasts the world’s second busiest container port and is the gateway to the ASEAN region.\textsuperscript{4}

Before exporting to Singapore, it is essential to identify and appoint a knowledgeable and experienced importer or distributor as a partner. Food products in Singapore are generally distributed through local importers or distributors, who in turn supply them to retailers.\textsuperscript{5} 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 neighbourhood stores is usually managed by a number of intermediary wholesalers.

According to the World Bank’s Doing Business Report (2016), Singapore is noted as the easiest place in the world to start, run and do business.\textsuperscript{6} Singapore is recognized as the global leader for dealing with construction permits, enforcing contracts, and protecting minority investors. With regards to trading across borders, Singapore received its lowest ranking, placing 41\textsuperscript{st} out of a possible score of 189.

\textsuperscript{2} UN Statistical Database "Individual Consumption Expenditure of Households: Singapore(2014), available at: \url{http://unstats.un.org/unsd/databases.htm}


2. THE SINGAPORE FOOD AND BEVERAGE MARKET

2.1 Market Size and Market Share

Singaporeans have always placed great emphasis on food, an aspect which reflects its cosmopolitan nature. It is heavily reliant on imports for virtually all of its food and drinks supplies and will always remain this way. It is estimated that 90% of food consumed in Singapore is imported.

Singapore is a multicultural city with a strong presence of a large expatriate community in addition to the local population. Singaporeans are rather open to new and exotic types of food such that the city state is an excellent platform for food imports. As a result of this, there is an extensive variety of food offered in Singapore. They run the gamut from Chinese and Thai dishes to Western cuisine like German, French and Italian delicacies.

Consumer spending on food and beverages is expected to grow 5% annually from 2016 through 2018, which will drive continued growth in the retail foods sector. The table below provides a breakdown of consumer expenditure in Singapore in 2014. Expenditure on food and non-alcoholic beverages accounted for 7%, while expenditure on alcoholic beverages, tobacco and narcotics accounted for 2%. It is also important to note that spending on restaurants and hotels accounted for 9% of overall consumer expenditure.

Table 2 Individual Consumption Expenditure of Households: Singapore (2014)

<table>
<thead>
<tr>
<th>Items</th>
<th>% of Consumption Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and non-alcoholic beverages</td>
<td>7</td>
</tr>
<tr>
<td>Alcoholic beverages, tobacco and narcotics</td>
<td>2</td>
</tr>
<tr>
<td>Clothing and footwear</td>
<td>2</td>
</tr>
<tr>
<td>Housing, water, electricity, gas and other fuels</td>
<td>19</td>
</tr>
<tr>
<td>Furnishings, household equipment and routine maintenance of the house</td>
<td>5</td>
</tr>
<tr>
<td>Health</td>
<td>7</td>
</tr>
<tr>
<td>Transport</td>
<td>11</td>
</tr>
<tr>
<td>Communication</td>
<td>2</td>
</tr>
<tr>
<td>Recreation and culture</td>
<td>13</td>
</tr>
<tr>
<td>Education</td>
<td>4</td>
</tr>
<tr>
<td>Restaurants and hotels</td>
<td>9</td>
</tr>
<tr>
<td>Miscellaneous goods and services</td>
<td>17</td>
</tr>
</tbody>
</table>

Sources:
8 https://www.ava.gov.sg/explore-by-sections/food/singapore-food-supply/the-food-we-eat
EU-Singapore Bilateral Trade

Singapore has been and continues to be an important market for European agricultural producers. Trends in the Singaporean food and beverage market indicate that there will be increasing opportunities for European producers in the future.

In 2015, bilateral trade between the European Union and Singapore hit EUR49 billion.\(^{11}\) Total exports to Singapore amounted to approximately EUR30 billion, while total imports amounted to approximately EUR19 billion. The European Union experienced a trade surplus with Singapore in 2015 amounting to approximately EUR11 billion. It is important to note that over the period 2010-2015, the EU’s exports to Singapore increased by 15%.\(^{12}\)

The EU is Singapore’s 2\(^{nd}\) largest import partner, accounting for 12.7% of total imports in 2015. With relation to its exports, the EU is Singapore’s 4\(^{th}\) largest trading partner, accounting for 8.3% in the same year. Trade between the EU and Singapore is dominated by trade in industrial goods.\(^{13}\) Besides the EU, Singapore’s main import partners in 2015 were China (14.2%), the United States (11.21%) and Malaysia (11.1%).\(^{14}\) On the other hand, Singapore’s major export partners were China (13.8%), China, Hong Kong SAR (11.4%), and Malaysia (10.9%).

Importantly, Singapore only produces 10% of its own food and imports 90% from other countries.\(^{15}\) Major consumer oriented food imports in Singapore include fish and seafood, dairy products, alcoholic and non-alcoholic beverages, meat, fresh fruit and vegetables, snack foods and processed fruit and vegetables. With regards to agri-food trade between Singapore and the EU, exports from the EU to Singapore amounted to EUR2 billion compared to EU’s imports from Singapore, which amounted to EUR160 million. Over the period 2014-2015, the EU’s exports to Singapore increased by 5.7% whereas its imports increased by 8.1%. In 2014, the main suppliers of agriculture, fish and forestry products to Singapore were Malaysia, Indonesia, China and the United States of America.\(^{16}\)

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\(^{13}\) EU Gateway Business Avenues: “South East Asia: EU- ASEAN Relations: Singapore” 2016 available at: [https://www.eu-gateway.eu/content/south-east-asia](https://www.eu-gateway.eu/content/south-east-asia)


The top five EU agri-food exports to Singapore in 2015 and their respective market shares are listed as follows:\(^{17}\):

- Spirits and liqueurs (42%);
- Wine, vermouth, cider and vinegar (18%);
- Chocolate, confectionery and ice-cream (5%);
- Milk powders and whey (4%); and
- Pork meat, fresh, chilled and frozen (3%).

trend upwards. Estimates reveal that over one-third of Singapore households will earn more than EUR135, 000 by 2018.18

**EU GI products in Singapore**

In 2010, Singapore accounted for approximately EUR830 million of EU GI sales in 2010, making it the second largest export market for the EU GI products together with Switzerland and after the US.19 Even though it is fair to assume that a part of these exports to Singapore are subsequently re-exported to other parts of Asia, the affluence of the consumer base in Singapore makes it a key market for certain GI products.

2.2 Growth Drivers and Trends

- Consumers in Singapore enjoy a high standard of living and are keen buyers of foreign products. Singaporeans are not only brand conscious, but are also very loyal and cautious towards exploring alternatives.20 They like to experiment with new products only after feeling assured about their quality and customer care service. Importantly, the purchasing power per capita is above that of most European countries.

- Declining levels of disposable income and falling residential property prices have affected optimism amongst consumers.21 Despite this, many continue to spend, although they maintain their historical caution about accumulating debt and consistently seek out low prices for both food and non-food items, and this has helped to drive growth in online shopping. Sustained levels of consumer confidence will rely heavily on external factors, such as the now sluggish performance of the Chinese economy.

Singapore has earned the distinction of being ‘one of the top 10 food cities in the world’ several years in a row, according to the travel guide publisher “Lonely Planet.” Singapore has a thriving and constantly evolving foodservice sector. A steady stream of international visitors and the tendency for local residents to eat out keep the foodservice sector vibrant. Euromonitor International estimated that Singaporeans spent about USD8.16 billion eating out in 2013. Singapore is Asia’s

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shopping destination but it also has an ultra-competitive retail landscape. However, as the high rate of retail incorporation in Singapore in 2015 shows, there are still opportunities for growth. According to a PwC report, over one-third of households in Singapore are forecast to earn more than USD150,000 by 2018, which implies that demand for higher-quality retail consumption will grow steadily.

- The rise of tourist arrivals has shifted companies’ efforts on meeting foreign consumer need with the introduction of more premium quality products. Different products were imported from different countries as companies sought to diversify their product portfolios.

- Consumers are becoming more health conscious and are embracing healthy lifestyle options.

- Importantly, Singapore is one of the countries in the world with a Muslim population that has the highest purchasing power. Thus, Singapore has a high potential market for Halal food, after Malaysia and Indonesia in the region. In the past, the consumption of Halal food was focused in regions that had a predominant Muslim population. However, this has significantly changed in recent years. Halal food has been extended to non-Muslim economies, where Halal food has become the new benchmark as a safe and hygienic form of food. Countries have been at the forefront of tapping into the global Halal market. In view of this, Singapore has taken steps towards becoming a Halal hub.

### 2.3 Market Access and Market Entry

As the market for consumer-oriented products is very open and easily accessible, there is fairly quick entry for newcomers. Competition in certain consumer product categories is sometimes very intense.

Singapore levies no import tariffs or excise taxes for all food and beverages, except for alcoholic beverages and tobacco products. There is a mandatory Goods and Services Tax (GST) of 7% of the cost, insurance and freight (CIF) value, which is levied on all goods and services at the point of distribution.

In Singapore, valuation for customs purposes is based on the Customs Valuation Code (CVC). The primary basis for Customs value is the transaction value of the imported goods when sold for export to Singapore. Where goods are dutiable, ad valorem or specific rates may be applied.

Before exporting to Singapore, it is essential to identify and appoint a knowledgeable and experienced importer or distributor as a partner. Food products in Singapore are

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generally distributed through local importers or 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 neighbourhood stores is usually managed by a number of intermediary wholesalers. The flow chart below shows the stages of distribution of consumer ready food and drinks in Singapore.

![Figure 2 Stages of Distribution for Consumer-Ready Food and Drinks in Singapore](image)

EU producers should note that Singapore is an extremely competitive market. The major supermarket and hypermarket operators control the whole retail market by actively segmenting it around different store concepts (and store brands/banners) and merchandising strategies that target the low income group through to the high income groups and expatriates. As a result, retailers control access to shoppers and have very strong bargaining power over suppliers of all forms of food and drinks. Marketing and distribution costs are extremely high for new product launches and also high for the ongoing maintenance of market shares and positions.

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There are 3 major companies that dominate the Singapore food retail market: NTUC FairPrice, Dairy Farm Group and Siong.27

**FairPrice Group**

The FairPrice group of supermarkets is owned by the co-operative NTUC FairPrice Co-operative Ltd. It was founded in 1973 with the social mission of moderating the cost of living in Singapore by providing competitively-priced products for the low income and lower-middle income consumers. From a single supermarket when it was established, it has now grown to become Singapore’s largest retailer with a network of more than two hundred and thirty outlets including FairPrice Supermarkets, FairPrice Xtra, FairPrice Xpress and Cheers Convenience Stores. Geographically, the FairPrice chain has the most extensive consumer reach and across all income segments.

FairPrice supermarkets can be found in almost every residential estate in Singapore. They primarily target the low income to the middle income consumers. But in recent years, FairPrice has also attempted to extend its reach to middle income consumers with higher spending power with the establishment of FairPrice Finest, which sells more fine foods compared to their other outlets. Nevertheless, in determining whether a product should be procured for FairPrice, competitive pricing is still one of the factors taken into consideration given their role as a cooperative.

**Dairy Farm Group**

The Dairy Farm Group, which is headquartered in Hong Kong, runs many supermarket brands. Their target each consumer segment from the highest income consumers in Singapore right down to discount stores. The supermarket brands are as follows:

- **Cold Storage**

Established in 1903, "Cold Storage" is an iconic name, unique in the history of Singapore, and is the country’s oldest supermarket operator. In 1993, Cold Storage in Singapore was acquired by the Dairy Farm Group.

• **The Market Place**

As a premium supermarket, the Market Place supermarkets focus on the high and upper-middle income consumers although some middle income consumers sometimes shop there.

• **Giant**

Giant offers fresh, groceries and general merchandise, targeting at the value conscious shoppers.

• **Three-Sixty Gourmet Supermarket**

There is one gourmet supermarket operated by the Dairy Farm Group situated at probably Singapore's most expensive shopping mall (ION Orchard). It caters to the highest income consumers in the country. They position themselves as the “Epicurean Heaven” for all shoppers. Top luxury food brands and labels from around the world can be found at the Three-Sixty Gourmet Supermarket. They include brands such as Fauchon, Hediard and Dean & Deluca. All types of fine food such as special Italian vinegar, flavored oils, herbs, caviar, wine and specialty cheeses are carried at Three-Sixty. It also has a large organic food section.

**Sheng Siong**

Sheng Siong Supermarket was founded in 1985 by three brothers. They had started out selling chilled pork at a booth in a supermarket chain store, but when the store owner ran into financial trouble, the brothers took the plunge and ventured into retail business by taking over the whole store. Today, they operate more than 25 supermarkets, are listed on the Singapore Stock Exchange and are the 3rd largest supermarket chain in the country.

Sheng Siong’s stores are very much targeted at low income consumers. While they sell a whole range of products, not unlike FairPrice and Cold Storage, most of their products are sourced from neighbouring countries in South East Asia, and China. Their “Taiwan Food Fair” and “Korean Food Fair” promotions are popular among consumers.

The strategies of the retailers in segmenting the market means that it is possible for a shopper to buy a huge range of different products from across the world. This arises
because of consolidated shipments imported either by the retailer, a part of its group, or an independent importer-distributor.

**Infrastructure**

Singapore boasts excellent transportation infrastructure. Businesses can tap into Singapore’s excellent shipping and air links, as well as its first-class telecommunications and banking facilities to manage their global operations from Singapore. It is considered a top global transportation hub. With connections to over 600 ports in 120 countries, Singapore boasts the world’s second busiest container port and is the gateway to the ASEAN region.  

**Doing Business in Singapore**

According to the World Bank’s Doing Business Report (2016), Singapore is noted as the easiest place in the world to start, run and do business.  

Singapore is recognized as the global leader for dealing with construction permits, enforcing contracts, and protecting minority investors. As it relates to trading across borders, Singapore received its lowest ranking, placed 41st out of 189.

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2.4 Key Markets by Geography

Singapore is one of the world’s few remaining city-states. Singapore’s main shopping strips include the following.\(^{30}\)

**Orchard Road**

This 2.2km shopping boulevard inspires awe and horror in equal measure. *Packed with more than 20 shopping centers*, from label palace ION Orchard to the high street staples of 313@Somerset, the sheer scale of this retail onslaught is overwhelming. Another giant mall, Orchard Gateway, was opened in 2014.

**Little India**

A world apart from the gleaming malls of Orchard Road, Little India’s ramshackle streets are a treasure trove of art, antiques, textiles, food and music, while the infamous 24-hour Mustafa Centre department store is an experience in itself.

**Dempsey Road**

Dempsey Road, southwest of Singapore Botanic Gardens off Holland Road has boomed in recent years, as more and more of the colonial army barracks buildings have been turned into *high-end restaurants and bars*.

**VivoCity**

With its vast size, distinctive wavy shape, odd Flintstones-style facade and waterfront location facing Sentosa Island, VivoCity was unveiled in 2006 as the new poster child of Singapore retail – the mall that would lure the city’s shoppers away from the madness of Orchard Rd. There is also a range of restaurants and bars.

2.5. Customs, SPS Requirements and Labelling

**Customs Procedures**

Singapore’s Customs Act, Goods and Services Tax (GST) Act, and Regulation of Imports and Exports Act govern the import of all goods into the country. Business entities are required to register with the Accounting and Corporate Regulatory Authority (ACRA) before engaging in any import/export activity. They must obtain a Unique Entity Number and activate a customs account with Singapore Customs. Applications for the activation of a customs account can be processed within 4 working hours (if no supporting documents are required) or 3 working days (from receipt of complete supporting documents).

Customs procedures, including permit applications are carried out online through Singapore Customs’ single window TradeNet. All trade declarations are submitted and processed through the system. An import permit is required for each import consignment (except for goods that are to remain in free trade zones for transshipment to other countries). Operators must obtain the import permit prior to importation. In 99% of all cases, a decision is provided within 10 minutes.

Importers are required to register as a "declaring agent" in order to make an application for a permit, certificate or any form of approval; they are not required to appoint a declaring agent to transact on their behalf. In January 2013, Singapore Customs started implementing its Declaring Agent Governance Framework. The framework aims to raise the level of proficiency and professionalism of the declaring agent industry.

Under the framework, declaring agents are required to undergo an assessment by Singapore Customs during the registration process and subsequent renewals. The assessment covers criteria related to personnel management, training on customs procedures, the company's processes and procedures, standard operating procedures, and the company's information management and controls. Depending on the performance during the assessment, companies are classified into one of the following five categories, with increasing levels of trade facilitation accorded: basic, standard, intermediate, enhanced, and premium. The validity of the renewal period ranges from one year (basic band) to three years. Furthermore, companies benefit from reduced or a waiver of security requirements as they progress through the different bands. For instance, premium band companies are not required to lodge a security for most type of transactions.

Singapore has no laws or regulations relating to pre-shipment inspection. Physical examination of imports is carried out by the Immigration and Checkpoints Authority (ICA) based on specific intelligence or risk profiling. Documentary checks and audits are conducted on past shipments.

Here is a quick guide for exporters on the importation procedures as stated on Singapore Custom’s website:

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As an importer, you will need to first **determine if duty and/or GST payment should be made** when your goods enter Singapore:

Duty and/or GST are suspended when goods remain inside a FTZ

Duty and/or GST are payable if goods are released directly for local circulation

When goods are moved from a FTZ or entry point into a Customs licensed premises (such as zero-GST warehouses or licensed warehouses), duty and/or GST will be suspended as long as the goods are stored in the licensed premises

Duty and/or GST are not payable for goods granted duty exemption or GST relief or those imported under the Temporary Import Scheme under Singapore Customs or the relevant Inland Revenue Authority of Singapore (IRAS) schemes:

- Major Exporter Scheme (MES)
- Approved Import GST Suspension Scheme (AISS)
- Import GST Deferment Scheme (IGDS)

To account for the entry of your goods, please follow the steps below to obtain the relevant import permits and authorization (if the goods are subject to control) from the relevant Competent Authorities.

**Step 1: Register for UEN and Activate Customs Account**

If an entity intends to:

Engage in import or export activities in Singapore, or

Apply for import, export and transshipment permits or certificates

It will need to:
Register with the Accounting and Corporate Regulatory Authority (ACRA) or the relevant Unique Entity Number (UEN) issuance agency to obtain a UEN; and Activate its Customs Account

**Step 2: Check if Your Goods are controlled**

Do check if the goods you intend to import are controlled goods or goods subject to restrictions by Competent Authorities (CAs) in Singapore.

You may search using the description of the goods, Harmonized System (HS) code or CA product code. If the item is subject to control, the name of the CA will be indicated next to its HS code. You may check directly with the respective CAs on their licensing requirements.

If you require advice on the full 8-digit HS code of the product, you may apply for an official classification ruling at a fee of SGD75 per product. Please note our classification rulings are only applicable for use within Singapore.

**Step 3: Register for Inter-Bank GIRO Account**

An Inter-Bank GIRO (IBG) account with Singapore Customs is required for the direct payment of duties, GST or other miscellaneous fees.

Submit the completed original copy of the IBG form to:

Head, Procedures & Systems
Singapore Customs
55 Newton Road #07-02
Revenue House
Singapore 307987

Once the IBG account is approved, you may e-file to authorize your declaring agent to deduct the payment directly from your IBG account. If you do not maintain an IBG account with Singapore Customs, the duties and GST will be deducted from the declaring agent’s account.

**Step 4: Furnish Security**

You are required to furnish security for transactions involving dutiable goods, temporary import of goods for approved purposes, and for the operation of licensed premises such as licensed warehouses and excise factories.

The security furnished should be in the form of a bank or finance company guarantee or an insurance bond.

More information on security lodgment can be found on the website.

**Step 5: Apply for Customs Import Permit**

You may:
Appoint a declaring agent to apply for customs permits on your behalf; or

Apply for customs permits for your own or on behalf of your clients. To do so, you will need to register as a declaring agent and apply for a TradeNet user ID.

All permit applications must be submitted via TradeNet, which is accessible through:

TradeNet front-end software from an approved software vendor; or

Government Front-End module

Each permit application typically costs SGD2.88. If you are engaging a declaring agent for assistance in declaring the permit, you may wish to check with your appointed agent on the charges involved.

**Step 6: Prepare Documents for Cargo Clearance**

Approved permits are issued with a validity period. You should ensure the validity of the permit presented for goods clearance. For imports of containerized cargo, the container number and shipper seal number are required when applying for a permit.

Documents Required for Containerized Cargo

For import of containerized cargo by sea, you are not required to present the printed copy of the customs permit and supporting documents to the checkpoint officers at the entry points.

For import of containerized cargo by air or land, you are required to produce the permit and supporting documents such as invoice, packing list and Bill of Lading/Air Waybill, to the checkpoint officers for verification.

An example of conditions in the permit indicating this requirement:

<table>
<thead>
<tr>
<th>A1</th>
<th>The goods and this permit with invoices, BL/AWB, etc. must be produced for Customs clearance/ endorsement at a Free Trade Zone &quot;In&quot; Gate.</th>
</tr>
</thead>
<tbody>
<tr>
<td>A3</td>
<td>The goods must be produced with this permit, invoices, BL/AWB, etc. for Customs endorsement at an Airport Customs checkpoint or designated Customs office or station as required.</td>
</tr>
<tr>
<td>H1</td>
<td>The goods and this permit with invoices, BL/AWB, etc. must be produced for Customs clearance / endorsement at Woodlands Checkpoint / Tuas Checkpoint.</td>
</tr>
</tbody>
</table>

Documents Required for Conventional Cargo

For conventional cargo, please present the goods, printed copy of the customs permit, and supporting documents such as invoice, packing list and Bill of Lading/Air Waybill, to the checkpoint officers at the time of cargo clearance for verification.

An example of conditions in the permit indicating this requirement:
A1 | The goods and this permit with invoices, BL/AWB, etc. must be produced for Customs clearance/ endorsement at a Free Trade Zone "In" Gate.

A3 | The goods must be produced with this permit, invoices, BL/AWB, etc. for Customs endorsement at an Airport Customs checkpoint or designated Customs office or station as required.

H1 | The goods and this permit with invoices, BL/AWB, etc. must be produced for Customs clearance / endorsement at Woodlands Checkpoint / Tuas Checkpoint.

For a consignment which requires **partial clearance**, the same permit should be presented each time for endorsement till the whole consignment is completely cleared.

**Please note partial clearance is not allowed for goods brought in via Woodlands and Tuas checkpoints.**

**Step 7: Retain your Trade Documents**

Generally, you are required to retain the relevant supporting documents relating to the purchase, import, sale or export of the goods for a period of 5 years from the date of the customs permit approval.

These documents can be stored as physical hardcopies or as images. You are required to produce these supporting documents to Singapore Customs upon request.

**SPS Requirements in Singapore**

Singapore ensures that its SPS measures are consistent with international standards, guidelines, and recommendations of the Codex Alimentarius, the World Organization for Animal Health (OIE) and the International Plant Protection Convention (IPPC). In the absence of such international/regional standards, Singapore conducts its own risk-assessment and makes risk-management decisions, taking into consideration economic, technical, and other relevant factors. Provisional SPS measures may be taken where scientific evidence is insufficient.

Food safety, animal and plant health are under the responsibility of the Agri-food and Veterinary Authority of Singapore (AVA), which is also the SPS enquiry point.

The main statutes governing SPS measures are the Agri-food and Veterinary Authority Act; the Animal and Birds Act; the Control of Plants Act; the Wholesome Meat and Fish Act; the Sale of Food Act; the Endangered Species (Import and Export) Act; the Wild Animals and Birds Act; the Fisheries Act; and the Feeding Stuffs Act.

All food products and food appliances are regulated by the AVA. All operators who wish to import, export or transship food products are required to obtain a relevant trader's

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license or register with the AVA. The authorities indicated that the purpose of the licensing system is to maintain a register of all importers for traceability purposes.

For meat, fish/seafood, and fresh fruits and vegetables, licenses are issued for one year. There is a registration fee of SGD84 for meat and fish products, and SGD378 for fresh fruits and vegetables. Licenses to import table eggs are issued free of charge. A simple registration (free of charge) is required for the importation of other food items, including processed foods. Selected high-risk food products are subject to additional controls, such as health certificates, laboratory analysis reports or proof that the source or factory is regulated by the authority of the exporting country through a licensing system or similar food safety regulation.

The AVA carries out inspections of food products and establishments in a risk-based manner. The following are key guidelines which apply to food products and food establishments:

- All food items are subject to traceability requirements, indicating the country of origin or the farm/establishment.
- Imports of dairy products, livestock, meat, and fish are considered to be "high risk" and are subject to strict controls, involving, inter alia, accreditation of foreign farms and establishments, inspection, and testing. Accreditation is carried out by the AVA based on risk assessment, including factors such as the veterinary infrastructure, disease status, legislation and other SPS measures, and hygiene.
- Meat imports are allowed only from accredited establishments in countries with which Singapore has protocol agreements. Chilled pig meat may only be imported from Australia, Canada, Denmark, New Zealand, Sweden, and the United States.
- Frozen beef, mutton, and poultry meat may be imported from a limited number of countries, and in some cases, only from AVA-accredited establishments.
- Fresh eggs are imported only from accredited farms in Australia, Japan, Malaysia, the Republic of Korea, New Zealand, Sweden, and the United States.
- Imports of broiler chickens and ducks are only allowed from accredited farms in Malaysia.
- Dairy products from countries that are not free from foot-and-mouth disease may be imported if subjected to double pasteurization treatment.
- Imports of high-risk shellfish products, such as oysters, cockle meat, cooked prawns, and cooked crab meat, are permitted only from certain sources with recognized sanitation programs. Live oysters may only be imported from Australia, Canada, France, Ireland, the Netherlands, New Zealand, the United Kingdom, and the United States.

As it relates to plants, imports must be accompanied by phytosanitary certificates from the country of origin. Phytosanitary certificates are provided by the AVA for plants and plant products being exported from Singapore, to certify freedom from plant pests to meet the importing country’s requirements.

Labelling
The Sale of Food Act and the Food Regulations contain the main labelling requirements for prepackaged food in Singapore. The Agri-Food and Veterinary Authority of Singapore (AVA) maintains a guidebook to regularly update the industry on the requirements.

Labeling requirements which are mandatory include:

i. Name and description of food;
ii. Statement of ingredients;
iii. Declaration of foods and ingredients known to cause hypersensitivity;
iv. Declaration of net content in package;
v. Name and address of the local manufacturer or importer; and

Exemptions from labelling requirements apply in the following circumstances:

i. Food weighed, counted or measured in the presence of the purchaser;
ii. Food that is loosely packed at the retailer’s premises; and
iii. Intoxicating liquors are not required to carry a statement of ingredients on their labels.

Nutrition labelling is required when nutrition claims, or permitted health claims are made. More information about these claims can be found in the following topics of this material. The Food Regulations require nutrient declaration in an acceptable nutrition information panel, for pre-packed foods for which nutrition claims are made. The information to be declared in the panel includes the energy, protein, fat and carbohydrate contents of the food. Declaration of other nutrients is mandatory when such nutrients are the subject of a nutrition claim.

The current Food Regulations in Singapore do not specify the requirements for the use of claims suggesting that a food product is organically produced or is free of gluten (claims are represented using words like “organic” and “gluten-free” respectively).

To ensure consumers’ protection and a level playing field for the industry, AVA (Agri-Food & Veterinary Authority of Singapore) currently adopts the guidelines and standard established by the international food standards body, the Codex Alimentarius Commission for the use of such claims

Products as specified as organic, which are imported to Singapore may be marketed only where the competent authority or designated body in the exporting country has issued a certificate of inspection stating that the lot designated in the certificate was obtained within a system of production, preparation, marketing and inspection applying at least the rules provided for in all sections and annexes of these guidelines of the Codex Alimentarius Commission.

There are also other labeling systems that foreign producers can apply to. One such labelling programme is the Healthier Choice Symbol Program.

The Healthier Choice Symbol (HCS) on packaged food products indicates that they are healthier options, and this helps consumers to make informed food choices when grocery shopping. Products carrying the HCS are generally lower in total fat, saturated fat, sodium and sugar. Some are also higher in dietary fiber and calcium compared to similar products within the same food category. Each food category has a separate set of nutritional criteria to adhere to. Information about how to apply for a Healthier Choice Symbol and whether your wine is eligible for the symbol can be found here. The beverages that are covered under this Program include malted or chocolate drinks, 3-in-1 or 2-in-1 coffee/tea beverages, and sweetened drinks. Seven out of ten Singaporeans were found to be aware of the Healthier Choice Symbol (HCS) and 69% had purchased products because of this symbol.

About 15% of the Singaporean population is Muslim. Dairy products that are imported to Singapore do not require halal certification and labelling. However, if food has been prepared according to Islamic law and is free from pork products, alcohol and certain other ingredients, producers can opt to apply for halal certification. The certification and labelling must be endorsed by the Islamic Religious Council of Singapore (MUIS).

2.6 The Status of Geographical Indications (GIs) and Intellectual Property (IP) Protection

Singapore is known to employ the strongest Intellectual Property (IP) protection in Asia. International surveys consistently rank Singapore's IP regime as one of the best in the world; the World Economic Forum's Global Competitiveness Report 2015/16 ranked Singapore 4th globally for IP protection.
Singapore’s aim is to position itself as an IP hub in Asia.\(^{36}\) In 2012, the Government adopted an IP Hub Master Plan for IP transactions and management, IP filing, and IP dispute resolution. Initiatives under the Master Plan include the development of patent search and examination capability and appointment as an International Searching Authority and International Preliminary Examining Authority under the Patent Cooperation Treaty; and the establishment of a specialist list of arbitrators for IP cases at the Singapore International Arbitration Centre. WIPO’s Arbitration and Mediation Centre established an office in Singapore in May 2010. With the new office, disputes involving ownership and validity of IP rights applied for in Singapore can be resolved through mediation under the WIPO Rules.

Geographical indications are currently protected in Singapore by the Geographical Indications Act 1999. A new Geographical Indications Act (GI Act) with enhanced protection measures was passed by Parliament in April 2014. It is expected to come into force upon the ratification of the EU-Singapore Free Trade Agreement. A list of EU GI names will be annexed to the Agreement once they will have passed the SGP registration procedure.

The Act will create the GIs Registry and once the registry is operational, foreign nationals can also register their PGO and PGI labeled goods as protected GIs in Singapore. Currently, the registry is still under construction. It means that currently there is no way of registering GIs in Singapore.\(^{37}\)

Additional European products with PDO, PGI, or TSG labelling are likely to be present in the Singaporean market but might not have been registered. Exporters are advised to seek further guidance on geographical indications in Indonesia through resources such as the South East Asia Intellectual Property Rights Helpdesk, Geographical Indications & TRIPs Guide, and independent consultations.

**Definitions of GIs in Singapore**

According to the Geographical Indications Act 1999\(^ {38}\), a “geographical indication” means any indication used in trade to identify goods as originating from a place, provided that —

a) The place is a qualifying country or a region or locality in the qualifying country; and

b) Given quality, reputation or other characteristic of the goods is essentially attributable to that place.


\(^{38}\) Singapore Statutes Online: "Geographical Indications Act" 30 December 1999 available at: http://statutes.agc.gov.sg/aol/search/display/view.w3p;page=0;query=DocId%3Afdc740d5-f8b3-4d7e-8fdcebcb3bf81ea9%20Depth%3A0%20ValidTime%3A30%20F12%201999%20TransactionTime%3A30%20F12%201999%20Status%3Ainforce;rec=0;whole=yes
Enforcement

IPR enforcement in Singapore is based on cooperation between the authorities and the rights holders, as well as ex officio action. The Supreme Court and subordinate courts have jurisdiction over matters as provided for under Singaporean IP legislation. Appeals of High Court decisions may be referred to the Court of Appeal. Civil remedies include injunctions to stop infringement, damages including recovery of profits and expenses, and destruction of infringing goods. The courts may also order punitive damages where provided for in legislation (e.g. Trade Marks and Copyrights Acts).

IPR offences are primarily handled by the Intellectual Property Rights Branch of the Police (IPRB). The IPRB may seize goods that infringe trademark or copyright legislation, both upon official notification and in an ex officio capacity, where there is reasonable cause to suspect that a criminal offence has been committed under the legislation. In 2015, IPRB conducted 166 operations against IPR infringers, seizing products with an estimated street value of about SGD16.3 million.

Case Study: Geographical Indications in Singapore

The EU has a long history of protecting its geographical indications (GI), such as Bordeaux wines, Parma ham or Bayerisches Bier. Consumers in third countries are also beginning to be aware of the quality of many European GIs and are increasingly ready to pay a premium price for such goods of higher quality.

As a result, GIs play an increasingly prominent role in EU trade: globally, it is estimated that in 2010, some EUR11.5 billion worth of GIs were sold outside the EU. Half of those exports were wines, followed by spirits and foodstuff GIs (such as cheeses, meat products, or primary products such as oranges or olives).

According to a recent study, Singapore accounted for EU GI sales in 2010 of some EUR830 million in 2010, making it the EU's number two global GI export market together with Switzerland, after the US. Even though it is fair to assume that a part of EU GI exports to Singapore are subsequently re-exported to other parts of Asia, the affluence of the consumer base in Singapore makes it a key market for certain GI products.

Singapore has so far only protected a small number of European GI as trademarks, but has not offered GI protection as such. Under the EUSFTA, Singapore agrees to set up a new register for GI protection, and to protect registered GI to a higher level. The EU has put forward a list of 196 GIs which it would like to see registered in Singapore under this new register. Those GI terms accepted for registration in Singapore would thus gain exclusive protection in Singapore's market. For example, certain distinctive European-named cheese, meat or beer products of non-European origin will no longer be sold in Singapore unless co-existence has been exceptionally granted.

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The EUSFTA will reinforce Singapore's position as a key export destination for European GIs. Here, the higher substantive level of protection for some GIs will play a role, as will the facilitation of enforcement with the new GI register. Moreover, customs enforcement at the border will be extended to GIs, thus allowing a more efficient crackdown on counterfeit trade.

This is particularly important for a transport hub like Singapore. As a result, GI exports to Singapore are set to flourish further. Moreover, consumers will over time be increasingly able to recognize the GI label as a sign of quality and thus possibly be willing to pay premium prices. Last but not least, the exclusive protection to be granted in the future by Singapore to certain GIs, such as Parma ham, will also considerably strengthen the market position of certain EU products and especially of certain meat and dairy products.

(Source: The Economic Impact of the EU-Singapore FTA)

Registration of GIs

Recalling that under the EU-Singapore FTA, Singapore has agreed to set up a new register for GI protection and to protect registered GIs to a higher level, it is important to understand the formal procedures that are required to register a GI in Singapore.

The registration system for GIs is a three-step process involving the application, examination of the application, and publication to allow third-parties an opportunity to object to the application. Protection is granted for 10 years, and can be renewed for further periods of 10 years subject to the payment of a fee. Unregistered GIs will continue to be protected but will not be afforded enhanced protection under the Act.

The registration of a GI is allowed only for a selected category of goods. The products that are covered include wines, spirits and beers; cheese; meat and meat products; seafood; edible and non-edible oils; fruits and vegetable; spices and condiments; confectionary and baked goods; flowers and parts of flowers; and natural gum.  

It is important to note that the implementing rules for the EU-Singapore FTA have not been adopted yet.

It is furthermore important to note the following instances where a GI will not be protected:

1. It is immoral or against public order;
2. It is no longer in use or no longer protected in the country of origin;

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(3) It has become the common name in Singapore for the goods or services which it identifies;

(4) [for wines and spirits] it has been used continuously for at least 10 years preceding 15 April 1994 or in good faith preceding that date;

(5) It is confusingly similar to a trade mark for which rights had been acquired before the GI is protected in its country of origin; or

(6) It is the name of a person or a predecessor in a particular business.

In Singapore, the law protects only the GIs of a country which is a member of the World Trade Organization, a party to the Paris Convention for the Protection of Industrial Property, or a country designated by the Singapore Government as a qualifying country from which GIs of that country can be protected. In addition, the GI must be protected in its country of origin. The producer, trader or association of such producers or traders of any such GI enjoys automatic protection.

**Supervision and Administration**

The Ministry of Law is responsible for formulating IP policies and strategies. The Intellectual Property Office of Singapore (IPOS) is responsible, inter alia, for implementing intellectual property legislation; administering the registries for appropriate forms of IP; providing administrative support to the Copyright Tribunals; representing the Government internationally on intellectual property matters; and promoting intellectual property awareness.

**Competent authorities for GI protection**

- The Ministry of Law

  Ministry of Law
  100 High Street
  #08-02 The Treasury
  Singapore 179434
  Tel: 1800-CALL-LAW (1800 2255 529)
  Fax: (65) 6332 8842
  [https://www.mlaw.gov.sg/content/minlaw/en.html](https://www.mlaw.gov.sg/content/minlaw/en.html)

- The Intellectual Property Office of Singapore (IPOS)

  51 Bras Basah Road #01-01, Manulife Centre
  Singapore 189554
  Tel: (65) 6339 8616
Fax: (65) 6339 0252 - for general, registered designs and trade mark correspondences
Fax: (65) 6339 9230 - for patent correspondences
https://www.ipos.gov.sg/

Legislation, Regulations and Administrative Measures

(2) Geographical Indications Act (Chapter 117B)
3. MARKET SNAPSHOTS FOR SELECTED PRODUCTS

This section provides specific information for various food and beverage categories and products. This information includes a market snapshot containing analysis of the market size, trends, distribution, and consumer profiles and sensitivities. Additional information regarding market entry, import procedures, and considerations for intellectual property are also included.

Within the following category specific market snapshots products have been aggregated and analysed according to the Harmonised System (HS) codes. For some product categories a single HS 4 entry will be covered whilst for others there will be multiple HS 4 categories across different HS 2 chapters. See Figure below for specific HS 4 codes covered in the following product category sections.

<table>
<thead>
<tr>
<th>Product Category</th>
<th>HS 2 Chapters/ HS 4 Codes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wine and Vermouth</td>
<td>2204 and 2205</td>
<td>Wine and aromatized wines</td>
</tr>
<tr>
<td>Spirits</td>
<td>2208</td>
<td>Spirits of an alcoholic strength of less than 80%</td>
</tr>
<tr>
<td>Beer</td>
<td>2203</td>
<td>Beer made from malt</td>
</tr>
<tr>
<td>Fresh and Processed Meat</td>
<td>0201,0202,0203,0204,0206,0207,0210,1601 and 1602</td>
<td>Fresh meat covers the meat and edible offal of beef, pork, lamb and poultry; processed meat covers edible meat or offal that has been salted, is in brine or is dried or smoked, sausages and similar products of offal and meat and other prepared or preserved meat or offal.</td>
</tr>
<tr>
<td>Olive Oil</td>
<td>1509 and 1510</td>
<td>Olive Oil and its fractions and other oils produced from olives.</td>
</tr>
<tr>
<td>Fresh Fruits and Vegetables</td>
<td>07 and 08</td>
<td>All products under these chapter headings</td>
</tr>
<tr>
<td>Processed Fruits and Vegetables</td>
<td>20</td>
<td>All products under these chapter headings</td>
</tr>
<tr>
<td>Dairy Products</td>
<td>0401,0402,0403,0404,0405 and 0406</td>
<td>Includes milk and cream not concentrated or sweetened, milk and cream concentrated or sweetened, buttermilk and yoghurt, whey and natural milk products, butter, cheese and curd. Pasta and couscous, and breakfast cereals and cereal bars</td>
</tr>
<tr>
<td>Processed Cereals</td>
<td>1902 and 1904</td>
<td></td>
</tr>
<tr>
<td><strong>Bread, Pastry, Cakes, Biscuits and other bakery products</strong></td>
<td>1905</td>
<td></td>
</tr>
<tr>
<td><strong>Chocolate and Derived Products, and Confectionery</strong></td>
<td>1806, 1704</td>
<td></td>
</tr>
<tr>
<td><strong>Honey</strong></td>
<td>0409</td>
<td></td>
</tr>
<tr>
<td><strong>Gum Resins and Plant Extracts</strong></td>
<td>1301 and 1302</td>
<td></td>
</tr>
<tr>
<td><strong>Cotton and Live Plants</strong></td>
<td>52, 06</td>
<td></td>
</tr>
</tbody>
</table>

**Table 3 Product Classification Table**

Source: Harmonized Commodity and Coding Description System

Products include bread, biscuits, wafers, cakes and pastries

Chocolate and other food preparations containing cocoa, Sugar confectionary (including white chocolate, not containing cocoa)
Includes natural honey

Includes gum resins, vegetable saps and extracts; pectic substances, pectinates and pectates, agar-agar and other mucilages and thickeners, whether or not modified, derived from vegetable products.
Includes all forms of cotton, bulbs, live plants, cut flowers and ornamental foliage
### 3.1 Wine

#### Consumption

Singapore offers an established westernized market that is currently consuming approximately 15 million liters of wine per annum.\(^{42}\) It is predicted that there will be a 40% increase in Singapore’s wine consumption over the course of the next few years.\(^{43}\)

The World Health Organization in its Global Alcohol Report (2014) reported that wine consumption in Singapore accounted for 13% of total alcohol consumed in liters of pure alcohol in 2010. This is in direct contrast to beer consumption, which accounted for 70% of total alcohol consumed, while consumption of spirits accounted for 15%.

#### Consumption Trends

- Consumer spending on alcoholic drinks continues to increase due to the rising disposable incomes of Singaporean consumers. Singapore has a large number of single adults who are very clearly indulgent in their spending patterns when economic times are good. These spending patterns benefits premium products such as wines.\(^{44}\) In recent years, a more vibrant social scene with the opening of more restaurants and pubs also boosted sales.\(^{45}\)

- Several off-trade and on-trade retailers also capitalized on the consumers’ willingness to spend, especially young and affluent Singaporeans who continued to embrace the drinking culture and social scene.

- The rise of tourist arrivals has shifted companies’ efforts on meeting foreign consumer need with the introduction of more premium quality products. Different products were imported from different countries as companies sought to diversify their product portfolios.

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\(^{44}\) Switzerland Global Enterprise: "Food and Beverage Market Singapore" June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_02.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_02.pdf)

• Singaporeans prefer red wine over other varieties as this wine offers a plethora of health benefits. 46

• Though the Singaporean wine market remains considerably smaller than other wine industries, the country is currently at the forefront of Asian wine warehousing. Perfectly positioned in peninsular Southeast Asia, Singapore is an economic powerhouse that has both the capacity and proclivity to indulge in the best that wine lifestyle has to offer. In fact, in 2013 alone, the state-city consumed well over one million cases of nine-liter wines. 47

• There is a growing trend by wine enthusiasts of collecting vintage premium wines. 48 Some of the most sought-after wines include the 2005 Bordeaux and Delaney, as well as 2001, 2002, and 2004 vintages. With Singapore Wine Vault, (the largest wine storage facility in Southeast Asia), readily accessible to these wine connoisseurs, avid collectors can keep their liquid assets stored safely in the company’s bespoke drome cellars.

• Specialty stores in Singapore selling fine foods at higher prices than large retailers are usually independent single outlet butcheries, wine shops and bakeries. These stores are exclusive, target high income consumers and hold 1% of the market share. 49

• There has been constant improvement in the availability, variety and quality demanded by the wine market. More restaurants and wine bars are being opened with extended wine offerings to cater to this market. There has also been a growth in bottle shop numbers and increasing off trade consumption as the “Bring Your Own” (BYO) concept gains momentum.

Consumption Profiles

In Singapore, it is estimated that 70% of wine consumers are male, while 30% are female. The age range of wine consumers: 25-50. 50

As of 2014, 89% of the wine drinkers in Singapore admitted to being more inclined to go for sparkling wines than other varieties, like still wines. 51

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Singaporeans' favourite wine is by far red wine, which represents 70% of the still light wine market. Singaporeans consumed 645,000 9-litre cases of still red wine in 2014, a trend which will remain stable on the 2019 horizon. Rosé wine, which starts on a much lower level, grew by +24.2% between 2014 and 2019 and will continue to grow by +3.5% between 2014 and 2019. White wine, which holds the second rank with 251,000 cases consumed in 2014 will continue to grow, +1.2% on the 2019 horizon.

Generally, consumers of wine tend to be in the age range of 25-50 years old, and the majority are male, but like any developing market, this demographic can change quickly.

**Offer**

**Domestic Offer**

Wine sales in Singapore moved from SGD365 million in 2007 to SGD515.8 million in 2012. In like manner, sales volume moved from 6.8 million litres in 2007 to 10 million litres in 2012. The wine market is expected to maintain high growth momentum in value and volume terms over the period 2014-2019. The sparkling wine category will be the fastest growing category in Singapore's wine market. The still wine category has the highest share in Singapore's wine market. Vermouth is the largest segment in the fortified wine category. Importantly, food and drinks specialists account for the majority sales in Singapore's wine market.

Australia dominates the retail market with a range of products that segment it from "mass market" (very well distributed) to premium. In the mass market, its main competitors are South American and some U.S. wineries. In the premium area, its

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main competitors are France (subject to high profile promotions), which has a broad range of products, along with niche players like New Zealand, U.S. premium labels and some other EU countries.

Despite the slowing down tourist industry, Champagne volumes remained stable at around 56,000 9-litre cases since 2012. The segment depends mainly on tourists and expats. Special events such as the formula 1 race night give important boosts to the category. However the duty paid value of sparkling wine growth rate +1.2% is not as strong as the growth in value +9% which indicates, that Champagne is growing stronger than other sparkling wines.

In the lower price categories Prosecco benefits from the popularity of Italian restaurants (there are more than 250 of them in Singapore). The whole sparkling wine category is expected to grow by 4.7% in volume on the 2019 horizon.

**Imports**

According to statistics retrieved from the International Trade Centre, Singapore imported approximately EUR 344 million worth of wines in 2011. By 2015, wine imports rose to EUR 473 million. The main countries that exported wines to Singapore in 2015 and their respective market shares were: France (72.1%), Australia (9.4%), Italy (3.9%), and the United States of America (3.4%). Overall, the EU’s market share was 81.5%. In 2015, the volume of wine imports amounted to 30,811 cubic metres.

The chart below shows trends in Singaporean wine imports over the period 2011-2015.

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Exports

Singapore does not produce any grape-based wines. Therefore, the majority of its wine exports are assumed to be re-exports. According to statistics retrieved from the International Trade Centre, Singaporean wine exports moved from approximately EUR 257 million in 2011 to EUR 390 million in 2015. The main export destinations in 2015 and their respective market shares were: Japan (42.1%), Australia (17.1%), Hong Kong, China (11.1%), Malaysia (4.9%), and Indonesia (4.7%). In 2015, the volume of wine exports amounted to 17,934 cubic metres.
Figure 8 Singaporean Wine Exports (2011-2015)

Source: ITC TradeMap

Competition

Pernod Ricard led wine with 9% of total volume sales given its strong brand presence and brand awareness.\(^59\) Consumers can easily find Jacob’s Creek in foodservice and retail channels. In addition, Jacob’s Creek is available in red wine, white wine and sparkling wine, which led to a high share in wine.

Special Customs and SPS Requirements

Singapore is considered as a free port. However, all alcoholic beverages are subject to high duties and Goods & Services Tax (GST).\(^60\)

- Custom duties = SGD16.00 per liter of alcohol
- Excise duties = SGD60.00 per liter of alcohol
- Goods & Services Tax (GST) = 7%


\(^{60}\) "Singapore Customs" 2016 available at: [www.customs.gov.sg](http://www.customs.gov.sg)
GST is applied on an ad valorem basis on all dutiable and non-dutiable goods. The GST taxable is calculated based on the CIF (Costs, Insurance and Freight) value plus all duties and other chargeable costs, whether or not shown on the invoice.

**Labelling**

Labels must include the following information:61

- Product name;
- Name and address of manufacturer, importer, packer, and distributor;
- Country of origin;
- Date marking of minimum duration (expiration date);
- Ingredients should be listed in descending order of proportions by weight.

Certain food categories, including fruit wine, are required to meet specific labelling requirements.62 Regulation 195 of the Agri-Food and Veterinary Authority’s (AVA) Food Regulations:

(1) Fruit wine shall be the product of the alcoholic fermentation of the juice, or of the juice and other portions of fruit other than grapes.

(2) No fruit wine shall be labelled with the word “wine” unless the name of the fruit from which it is made immediately precedes the word “wine”. The name of the fruit shall be in letters of the same size and colour as the word “wine”.

**Challenges to EU Producers**

The importation of wine into Singapore attracts hefty taxes and, after several layers of margin, retail prices of wine are high. High taxes make Singapore one of the most

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expensive places to buy wines, the average bottle went up from SG$70.00 to SG$88.00 in 2014.63

**Distribution**

The main buyers within the alcoholic drinks market are supermarkets/hypermarkets, on-trade businesses, and specialist retailers. 64 The on-trade sale forms the leading distribution channel in the Singapore alcoholic drinks market. The total market share for on-trade distribution accounts for 59.8% followed by supermarkets/hypermarkets with a total of 17.3%. The rest of the market share is formed by specialist retailers and other channels such as department stores including duty-free stores.

**3.2 Spirits**

**Consumption**

Over the last half-decade, Singaporeans have increased their spirits consumption by almost 83%.65 The World Health Organization in their Global Alcohol Report (2014) revealed that the consumption of spirits in Singapore accounted for 15% of the total alcohol consumed in litres of pure alcohol in 2010.66 This is in contrast to beer, which accounted for 70% of total alcohol consumed, and wine, which accounted for 13%. Additionally, it has been reported that sales of spirits rose from SGD623.3 million in 2007 to SGD 1,012.4 million in 2012.

**Consumer Trends**

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• Consumer spending on alcoholic drinks continues to increase due to the rising disposable incomes of Singaporean consumers. In recent years, a more vibrant social scene with the opening of more restaurants and pubs also boosted sales.\(^{67}\)

• A burgeoning cocktail culture boosted sales of spirits in Singapore ranging from bourbon, which is an inexpensive spirit to use in cocktails, to increasingly popular white rum, tequila and artisanal gin.\(^{68}\)

• Several off-trade and on-trade retailers also capitalized on the consumers’ willingness to spend, especially young and affluent Singaporeans who continued to embrace the drinking culture and social scene.

• The rise of tourist arrivals has shifted companies’ efforts on meeting foreign consumer need with the introduction of more premium quality products. Different products were imported from different countries as companies sought to diversify their product portfolios.

• The growing cocktail culture is also supported by the trend of food pairing, which is now no longer about pairing food with just wine. Customized cocktail bars are also booming, with innovative mixes from bartenders, and consumers are willing to offer feedback and choices to bartenders when visiting these new concept bars.\(^{69}\)

• In 2015, the Liquor Control Act passed a new regulation that disallows consumption of liquor in all public places from 22.30hrs to 07.00hrs every day. Two groups of drinkers in particular were affected – lower-income foreign workers who drink mostly imported economy lager, as well as drinkers who patronize clubs or pubs and often purchase alcoholic drinks from convenience stores to consume before going to clubs and pubs, to save money.\(^{70}\)

**Consumer Profiles**

Female consumers will continue to be a key target consumer segment for alcoholic drinks in Singapore, with more flavored drinks that are lighter targeted at them\(^{71}\).

There is a growing cocktail culture which is featuring greater participation from men.\(^{72}\) In the past, there was a chauvinistic attitude and men would not be seen holding a cocktail glass but this is no longer the case.

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\(^{67}\) Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)


The relationship between Singaporeans and Scotch whisky

The US is the world’s leading importer of Scotch, and ships in nearly $1.32 billion worth of the Spirit each year. Although the US is the largest importer of Scotch in terms of per capita consumption, they are nowhere near the nation which consumes the highest number of Scotch bottle per person per year: Singapore. What it means is that, on average, Singaporeans drink 12.76 bottles of whisky per person per year.

Challenges to EU Producers

It is predicted that there may be some trading down from spirits to beer in the coming years, though it is expected to be a short soft phase. Spirits will still have its place in the Singaporean market, particularly due to growing interest in categories like cocktails, single malt Scotch whisky and Japanese whisky.

Offer

Domestic Offer

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73 Vulcan Post: "Singaporeans are the world’s hardest scotch whisky drinkers” 15 January 2014 available at: https://vulcanpost.com/3992/singaporeans-are-the-worlds-hardest-scotch-whisky-drinkers/
Spirits is expected to register a total volume compounded annual growth rate of 3% over the period 2015-2020, to reach 5 million liters in 2020. With a poor economic outlook for 2016 and perhaps beyond, consumers may trade down from spirits to beer to save money. However, this will likely be a short-lived phase, as demand for spirits will remain due to the rising sophistication of drinkers in Singapore. It is expected that consumers will trade down to lower price points, but for products such as whisky where the price differences between the more premium variants are less pronounced, the impact will be lower. The growing cocktail culture, however, will help to mitigate the effects.

**Imports**

In 2011, Singapore imported approximately EUR 1 billion of spirits. By 2015, import growth was modest and reached EUR 1.2 billion. The main countries from which Singapore imported spirits in 2015 and their respective market shares were as follows: France (50.5%), the United Kingdom (36.7%), China (4.5%), and the United States of America (2.6%). Overall, the EU’s market share was 90.2%. The volume of imports in 2015 amounted to 69,041 cubic metres.

The chart below shows the trends in Singapore’s imports of spirits from its major trading partners over the period 2011-2015.

![Figure 9 Singaporean Imports of Spirits (2011-2015)](chart.png)

Source: ITC TradeMap

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**Exports**

In 2011, Singapore’s exports of spirits amounted to EUR 1.2 billion. By 2015, exports rose to EUR 1.8 billion. The main export destinations and their respective market shares in 2015 were as follows: Vietnam (25.7%), Taiwan (12.3%), Hong Kong (10.5%), and Malaysia (10.2%). The volume of exports in 2015 amounted to 64,959 cubic metres.

**Competition**

Pernod Ricard led whiskies with a 37% total volume share due to its wide offering of different products. With a range including cognac, rum and whiskies products, Pernod Ricard established its foothold in multiple categories under multiple brands. For example, Chivas ranked first among blended Scotch whisky, while Absolute Vodka was the most popular vodka brand.

![Pernod Richard Spirits](image)

**Specific Customs and SPS Requirements**

Singapore is considered as a free port. However, all alcoholic beverages are subject to high duties and Goods & Services Tax (GST).

- Custom duties = SGD16.00 per litre of alcohol
- Excise duties = SGD60.00 per litre of alcohol
- Goods & Services Tax (GST) = 7%

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GST is applied on an ad valorem basis on all dutiable and non-dutiable goods. The GST taxable is calculated based on the CIF (Costs, Insurance and Freight) value plus all duties and other chargeable costs, whether or not shown on the invoice.

**Product-Specific Labelling**

Labels must include the following information: 

- Product name;
- Name and address of manufacturer, importer, packer, and distributor;
- Country of origin;
- Date marking of minimum duration (expiration date);
- Ingredients should be listed in descending order of proportions by weight.

Certain food categories, including compounded liquor, are required to meet specific labelling requirements. Regulation 210 of the Agri-Food and Veterinary Authority’s (AVA) Food Regulations:

1. Compounded liquor shall be liquor consisting of a number of different liquors not separately entitled to the same generic description. Compounded liquor shall not include in its nomenclature any geographic denomination of origin unless each of the different liquors comprising the compound is separately entitled to that geographic denomination.

2. No compounded liquor shall be labelled as liquor unless the name of the liquor is preceded by the word “compounded” which shall be in letters of the same size and colour as those for the name of the liquor. The label of such liquor shall, in addition to the normal requirement for liquor, include the words “Compounded in . . .” and in such blank space shall be specified the name of the country where the compounding was effected.

**Challenges to EU Producers**

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The importation of spirits into Singapore attracts hefty taxes and, after several layers of margin, retail prices of spirits are high. High taxes make Singapore one of the most expensive places to buy spirits, the average bottle went up from SG$70.00 to SG$88.00 in 2014.  

**Distribution**

The main buyers within the alcoholic drinks market are supermarkets/hypermarkets, on-trade businesses, and specialist retailers. The on-trade sale forms the leading distribution channel in the Singapore alcoholic drinks market. The total market share for on-trade distribution accounts for 59.8% followed by supermarkets/hypermarkets with a total of 17.3%. The rest of the market share is formed by specialist retailers and other channels such as department stores including duty-free stores. 

In recent times, sales of alcoholic drinks increased at foodservice outlets, where food is as important as the alcoholic drink. Cafés, for example, increasingly offered more alcoholic drinks products. As such, alcoholic drinks manufacturers are seeking to establish collaborations with consumer foodservice players to open up a new segment. 

**3.3 Beer**

**Consumption**

Beer remains Singaporeans' favorite alcoholic beverage. According to the World Health Organization’s Global Alcohol Report, beer consumption in Singapore amounted to 70% of total alcohol consumed in liters in 2010. This was followed by spirits (15%) and wine (13%). Annual beer consumption in Singapore is
approximately 22 liters per person. Additionally, it has been reported that purchases of beer increased from 85.1 million liters in 2007 to 114.2 million liters by 2012.

**Consumer Trends**

- Beer is the most common alcoholic drink for consumers and can be easily found in restaurants and cafés in Singapore. The types of beer in the market can be categorized into ales, stouts & bitters, low/no alcohol beers, premium lager, specialty beer and standard lager.

- Increased consumer interest leads to growth in the beer market especially among young and affluent drinkers who are more brand-conscious when it comes to beer drinking. There is also the shifting of preferences from local to imported beer. The younger populations are also increasingly drawn to local microbreweries featuring beer with Asian flavored spices. Flavored beers are likely to grow in prominence in the near future.

- Although a poor economic outlook is predicted for Singapore in 2016, beer will continue to do well in 2016 and perhaps beyond as people trade down from spirits. However, this will likely be a short-lived phase, as demand for spirits will prevail with the rising sophistication of drinkers in Singapore.

- The robust tourist and hospitality sector in Singapore will eventually boost on-trade consumption for alcoholic beverages.

- Specialty/craft beer still remains a niche market among alcoholic beverages in Singapore. Specialty/craft beer is considered as premium product similar to wine and liquor especially for on-premise consumption.

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85 Switzerland Global Enterprise: "Food and Beverage Market Singapore" June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)


Beer and food pairing events are becoming popular with on-trade channels increasingly involved in educating consumers on pairing the right beer with different cuisine. This has led to strong interest among consumers to try out more variety of beer available in the market.

**Consumer Profiles**

The sales volume of beer in Singapore comes mainly from foodservice outlets and supermarkets. Other than these, traditional establishments such as coffee shops also serve local beers and mass market brands at cheaper prices. Promotional and marketing activities of mass consumer brands are typically focused during festive seasons such as Oktoberfest, Christmas and Lunar New Year in Singapore.

**Challenges to EU Producers**

Government regulations have impacted beer sales in Singapore. In 2015, the Liquor Control Act passed a new regulation that prohibits consumption of liquor in all public places from 22.30hrs to 07.00hrs every day. This affected mainly lower-income foreign workers who drank mostly imported economy lager, and drinkers who patronized clubs or pubs and often purchased alcoholic drinks from convenience stores to drink before going to clubs and pubs, in order to save money. The regulation was passed to minimize public disorder from drinking in public. The new regulation resulted in an increase in sales of imported economy lager at supermarkets such as Sheng Siong at earlier hours, while clubbers or pubbers at Clarke Quay were driven into on-trade establishments to drink.

**Offer**

**Domestic Offer**

The Singaporean beer market had total revenues of $0.9bn in 2013, representing a compound annual growth rate (CAGR) of 4%.

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89 Quartz: "Singapore has the most expensive beer in Asia" 6 December 2013 available at: http://qz.com/155057/singapore-has-the-most-expensive-beer-in-asia/


between 2009 and 2013. Market volume increased with a CAGR of 3.9% between 2009 and 2013, to reach a total of 99.5 million liters in 2013. The performance of the market is expected to slow down, with an anticipated CAGR of 3.7% for the five-year period 2013 - 2018, which is expected to drive the market to a value of $1.1bn by the end of 2018.

The beer market in Singapore is considered highly saturated with a wide variety of brands from around the world. Standard lager is the largest segment of the beer market in Singapore, accounting for 73.1% of the market's total value. The Specialty beer segment accounts for a further 11.4% of the market.

The key brands available in both foodservice retail outlets and supermarkets are Anchor, Budweiser, Carlsberg, Chang, Coopers, Corona, Duvel, Erdinger, Foster’s, Grolsch, Heineken, Hoegaarden, Kilkenny, Leffe, San Miguel, Singha, Stella Artois, Tiger, Tsingtao and Victoria Bitter.

Importantly, Singapore has Asia’s most expensive beers. Results drawn from a survey reveal that a typical brew at a bar in Singapore costs a whopping $13.47. That’s 45% more than a beer in Beijing, which is the world’s 15th most expensive city, and 39% higher than one in Tokyo, which is the 10th most expensive place for foreigners. Even Hong Kong, with its similar overall cost of living, has comparatively inexpensive beer, at $9.18—a difference of $4.29 per bottle.

Imports

According to statistics retrieved from the International Trade Centre, Singapore imported approximately EUR 95 million of beer in 2011. By the year 2015, imports increased 70% to reach an all-time high of EUR 161 million. The main countries from which Singapore imported beer in 2015 and their respective market shares were as follows: Vietnam (27.3%), Malaysia (20.7%), the Netherlands (11.2%), India (8%), Belgium (5.1%), and Germany (4.5%). Overall, the EU’s market share was 24.2%. The volume of beer imports in 2015 amounted to 149,978 cubic metres.

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95 Quartz: “Singapore has the most expensive beer in Asia” 6 December 2013 available at: http://qz.com/155057/singapore-has-the-most-expensive-beer-in-asia/
The chart below depicts the trends in Singapore’s beer importation over the period 2011-2015.

![Beers Importation Chart](chart.png)

**Figure 11 Singapore’s Beer Imports (2011-2015)**

Source: ITC TradeMap

Importantly, the widest range of specialty/craft beer available in Singapore is mainly imported from Belgium. Trade statistics shows that Singapore imports approximately 6,962,658.04 liter of beer including ale from Belgium in 2012. One can also find a variety of specialty beer coming from Australia, Denmark, Germany, Japan, Netherlands, Taiwan and United States. The typical types of Belgian specialty beers available in the market are abbey beer, craft ales, lager/pilsner, trappist ales, wheat beer and lambic beer.

**Exports**

According to statistics retrieved from the International Trade Centre, Singaporean beer exports in 2011 amounted to approximately EUR 114 million. By 2015, exports increased to EUR 171 million. The main export destinations for Singaporean beer and their

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respective market shares in 2015 were as follows: Malaysia (33.1%), Cambodia (18.1%), Indonesia (10.5%), and Vietnam (8.7%). The volume of exports in 2015 amounted to 165,612 cubic metres.

![Figure 12 Singapore's Beer Exports (2011-2015)](source: ITC TradeMap)

**Competition**

Asia Pacific Breweries (APB) leads the Singapore market with its high profile and very well distributed brands, with Tiger, Heineken, Guinness, Anchor, ABC Extra Stout, plus some niche brands. It competes very aggressively for market share with Carlsberg Malaysia, which also views Singapore as its home market territory.

Tiger led beer with 28% of total volume sales in 2015. As the most famous local brand, Tiger not only holds the most memories for Singaporeans but also is a must-try experience for foreign tourists. Tiger was awarded for its unique and special Asian heritage after Heineken NV acquired Asia Pacific Breweries in 2012. There were more

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97 Switzerland Global Enterprise: "Food and Beverage market Singapore June 2013 available at: http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf

marketing campaigns that emphasize its Chinese heritage, which is now the main ethnic origin of Singaporeans, to attract Western tourists and cement its strong local identity.

**Specific Customs and SPS Requirements**

Singapore is considered as a free port. However, all alcoholic beverages are subject to high duties and Goods & Services Tax (GST).

- Custom duties = SGD16.00 per litre of alcohol
- Excise duties = SGD60.00 per litre of alcohol
- Goods & Services Tax (GST) = 7%

GST is applied on an ad valorem basis on all dutiable and non-dutiable goods. The GST taxable is calculated based on the CIF (Costs, Insurance and Freight) value plus all duties and other chargeable costs, whether or not shown on the invoice.

**Product-Specific Labelling**

Labels must include the following information:

- Product name;
- Name and address of manufacturer, importer, packer, and distributor;
- Country of origin;
- Date marking of minimum duration (expiration date);
- Ingredients should be listed in descending order of proportions by weight.

**Challenges for EU Producers**

Apart from stiff competition, imported alcoholic drinks in Singapore are generally expensive due to high taxes. This is especially the case for specialty/craft beer, which has a high level of alcohol content making it more expensive for on-trade consumption.

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Distribution

The main buyers within the alcoholic drinks market are supermarkets/hypermarkets, on-trade businesses, and specialist retailers. The on-trade sale forms the leading distribution channel in the Singapore alcoholic drinks market. The total market share for on-trade distribution accounts for 59.8% followed by supermarkets/hypermarkets with a total of 17.3%. The rest of the market share is formed by specialist retailers and other channels such as department stores including duty-free stores.

Specialty beers are usually imported by importers/distributors that service retail outlets (such as supermarkets) and food service sector (such as hotels, restaurants, bars and clubs). Specialty beer importers normally import directly from breweries. Specialty beer is considered a niche market in Singapore. Hence, the specialty beer available in supermarkets is extremely limited. Foodservice outlets such as bars and restaurants often get their supplies through local beer importers.

Other than on-trade consumption and brick-and-mortar stores, one can also purchase specialty beers online from local beer importers for personal consumption and corporate events.

Case Study: Distribution of Belgian Beer in Singapore

The mass market brands such as Hoegaarden, Leffe and Stella Artois are mainly distributed by local importers catering to different market segments. For instance, Lubritrade Trading Pte Ltd (www.lubritrade.com.sg) is the appointed agent for Inbev Group to market their brands, Hoegaarden, Leffe and Stella Artois for the travel retail industry in the region. Pacific Beverages Pte Ltd (www.pacbev.net) is the agent for Hoegaarden, Leffe and Stella Artois for the retail distribution in foodservice industry locally.

Cold Storage (www.coldstorage.com.sg) is one of the largest supermarket chains in Singapore that currently retails the following Belgian specialty beer in their outlets – Duvel and Chimay. Both labels are imported by a local distributor – Beer Importers & Distributors (S) Pte Ltd

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The main importers of Belgian beers are Beer Importers & Distributors (S) Pte Ltd and The Drinking Partners Pte Ltd (www.thedrinkingpartners.com). Both importers have a strong distribution network within foodservice industry especially restaurants, cafes and bars in Singapore. The Drinking Partners has the exclusive distributorship for Delirium Tremens as such that they are the only one offering Delirium Tremens on draught.

In Singapore, beer enthusiasts can find a wide range of Belgian specialty beer from Brussels Sprouts (part of Emmanuel Stroobant Group of restaurants - http://www.brusselssprouts.com.sg/home/speciality-bottled-beers/), and Oosters Belgian Brasserie (www.oosters.com.sg). Both Brussels Sprouts and Oosters serve more than 20 different types of Belgian specialty beer with Belgian cuisine in Singapore. Other than restaurants and bars, one can also find Belgian specialty beer in beer stalls such as The Good Beer Company, 99 Bottles and the Great Beer Experiment (owned by The Drinking Partners Pte Ltd – Belgian beer importer).

3.4 Fresh and Processed Meat

Consumption

In 2010, the purchase of meat and meat products comprised 17% of total food spending in Singapore. This is in comparison to bread and cereal products which were the most purchased food items accounting for 21% of total food spending. Seafood comprised 17% of total food spending, while vegetables made up 13% and dairy products accounted for 11% of total food expenditure.

Per capita meat, fish and seafood consumption in Singapore is higher than that of China, Japan, Indonesia, India and Vietnam. Additionally, meat consumption per capita is greater than fish and seafood consumption. Singaporeans consumed approximately 60kg of meat per capita in 2014.

The top two types of meat with the highest per capita consumption in Singapore are chicken and pork, respectively. On average, Singaporeans consumed 33kg of chicken and 20kg of pork in Singapore during year 2012. Consumption of beef, duck and mutton were far less. Singaporeans consumed 3kg of beef, 3kg of duck and 2kg of mutton.

**Consumer Trends**

- With rising consumer incomes, Singaporeans are prepared to pay for higher quality food products or products that will provide savings in labor and time. Hence, on the

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supermarket shelves, there are an increasing number of prepared and convenience foods. Seasoned portion-control meats and poultry are in increasing demand as both spouses work.

- Increased awareness about healthier living have increased the demand for organic products, and decreased the demand for genetically-modified foods. These types of food items have become increasingly popular with high-income households, parents of young children and professionals.\textsuperscript{107} There has also been a decrease in the amount of calories and fats consumed, which fell by 1\% and 4\% respectively, between 2007 and 2010.

- In Singapore, pork is the meat of choice and accounts for at least half of total per capita meat consumption.

\textbf{Challenges for EU Producers}

As Singapore moves towards becoming a Halal hub, meeting these Islamic food requirements may become mandatory. Importantly, Singapore is one of the countries in the world with a Muslim population with the highest purchasing power.\textsuperscript{108} Thus, Singapore has a high potential market for Halal food, after Malaysia and Indonesia in the region. In the past, the consumption of Halal food was focused in regions that had a predominant Muslim population. However, this has significantly changed in recent years. Halal food has been extended to non-Muslim economies, where Halal food has become the new benchmark as a safe and hygienic form of food. Countries have been at the forefront of tapping into the global Halal market. In view of this, Singapore has taken steps towards becoming a Halal hub.

\textbf{Offer}

\textbf{Domestic Offer}

As Singapore has virtually no crop or livestock production, practically all food ingredients are imported from a wide range of countries worldwide. Singapore imports all the meats and poultry it consumes from all over the world. From 2003 to 2012, the types of meat that are frequently imported into Singapore are chicken and pork meats.

Burgers continue to account for a dominant retail value share of frozen processed red meat of as much as 91\%.\textsuperscript{109} Other frozen processed red meat includes beef steak such

\textsuperscript{107} Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf


\textsuperscript{109} Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf
as sirloin and rib eye steak and beef and pork sausages. In frozen processed poultry, sausages account for the largest retail value share of 39%.

Freshly slaughtered chicken is obtained mostly by importing live poultry from Malaysia for slaughter in local abattoirs.\textsuperscript{110} About half of the chicken requirements are fulfilled through the imports of frozen chicken and chicken parts from Brazil, United States, China and the European Union. Since April 1999, when all local pig farms ceased production, the only source of imported live pigs (about 250,000 head annually) for slaughter comes from Indonesia. Most of Singapore’s pork requirements are fulfilled through the import of chilled pork from Australia and frozen pork from European Union and the United States. Beef, while not as widely consumed as chicken, is sold principally in the supermarkets. Major suppliers of beef include Australia, New Zealand, Argentina and China.

\textbf{Imports}

According to statistics retrieved from the International Trade Centre, Singapore imported EUR 566 million of meat and edible meat offal (HS Chapter 02) in 2011. This amount increased to EUR 754 million by 2015. The main countries from which Singapore imported meat and edible meat offal in 2015 and their respective market shares were: Brazil (40.5%), Australia (23.6%), the United States of America (9.8%), and the Netherlands (5.8%). The EU’s market share in this product category was only 14.1% in 2015.

The chart below shows trends in imports for several categories of meat and edible meat offal over the period 2011-2015.

As it relates to processed meat imports, specifically HS codes 1601 (i.e. prepared or preserved meat, offal or blood (excluding sausages and similar products, etc.) and 1602 (sausages and similar products, of meat, offal or blood; etc.), imports into Singapore in 2015 amounted to approximately EUR 22 million and EUR 128 million, respectively.

Imports of products that fall under the HS 1601 category came mainly from the United States of America (36.7%), Brazil (21.2%), Denmark (12.3%), and France (9.9%). Overall, the EU's market share in this product category was 26.5%.
Imports of products that fall under the HS 1602 category came mainly from Thailand (49%), China (15.9%), Malaysia (14%), and the United States of America (9.1%). Overall, the EU’s market share in this product category was 2.9%.

The figure below shows the trends in Singapore’s imports of processed meat over the period 2011-2015.

![Graph showing trends in Singapore’s imports of processed meat (2011-2015)](image)

**Figure 15 Singapore’s Imports of Processed Meat (2011-2015)**

Source: ITC TradeMap

**Exports**

Re-exports tend to be high in frozen meat, poultry and offal. In 2011, Singaporean exports of products that fall under the HS category 02 (Meat and Edible Meat Offal) amounted to EUR 53 million. By 2015, exports increased to EUR 89 million. The main export destinations for such products and their respective market shares in 2015 were:

<table>
<thead>
<tr>
<th>Year</th>
<th>1602 - Prepared or preserved meat, offal or blood (excluding sausages and similar products, and meat ...</th>
<th>1601 - Sausages and similar products, of meat, offal or blood; food preparations based on these products</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>87170</td>
<td>16379</td>
</tr>
<tr>
<td>2012</td>
<td>104246</td>
<td>15437</td>
</tr>
<tr>
<td>2013</td>
<td>103960</td>
<td>17592</td>
</tr>
<tr>
<td>2014</td>
<td>107349</td>
<td>16776</td>
</tr>
<tr>
<td>2015</td>
<td>127667</td>
<td>21585</td>
</tr>
</tbody>
</table>

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111 Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)
Indonesia (52.5%), Malaysia (24.2%), the United States of America (7.5%), and China (4.6%).

Exports of products that fall under the HS 1601 category amounted to EUR 4 million in 2015 and went mainly to Indonesia, Malaysia, Timor-Leste and Myanmar.

Exports of products that fall under the HS 1602 category amounted to EUR 7 million in 2015 and went mainly to Malaysia, Hong Kong, Brunei Darussalam, and Indonesia.

**Foreign Competition**

The table below provides an overview of foreign competition in the market segment.
<table>
<thead>
<tr>
<th>Market and Its Size</th>
<th>Major Countries</th>
<th>Supply Countries</th>
<th>Strengths of Key Supply Countries</th>
<th>Advantages and Disadvantages of Local Suppliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef, fresh/chilled and frozen</td>
<td>Australia- 42%, New Zealand- 23%, Brazil-20%, Uruguay-7%, USA- 6%</td>
<td>Australia and New Zealand (mainly food service, with a low level presence in retail) have full access for all of their products, which local buyers consider as good quality and price competitive. Brazil price competes in the frozen beef segment, which now has an expanded presence in supermarkets. It is gradually expanding its market share due to weak market conditions.</td>
<td>Beef is not produced in Singapore.</td>
<td></td>
</tr>
<tr>
<td>Market and Its Size</td>
<td>Major Countries</td>
<td>Supply Strengths</td>
<td>Advantages and Disadvantages of Local Suppliers</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------------</td>
<td>-----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Pork, fresh/chilled and frozen</td>
<td>Brazil -4% , Australia-17% , Netherlands-14%, USA-11%</td>
<td>Brazil dominates the frozen segment with value-for-money pork of a quality acceptable to local users, some in retail channels. Australia (Australian Pork and AIRPORK brands) dominates the fresh/chilled market on the back of its proximity and ability to export high volumes to Singapore. Netherlands frozen pork is in retail channels packed under private or retailer labels. While there is still consumer resistance to frozen pork, Australia has been gradually losing market share to Brazil due to increased price sensitivity and weaker consumer confidence since 2008 and Brazilian access to the major retailers under their brands, e.g. in FairPrice. Brazilians frozen pork pricing is about 30% less than Australian fresh pork.</td>
<td>Indonesian live pigs are imported and slaughtered in Singapore, and the pork is sold through wet markets (chilled retail stalls) and supermarkets. It is acceptable to Singaporeans and is part of the country’s food security for staple foods.</td>
<td></td>
</tr>
<tr>
<td>Poultry, frozen</td>
<td>Brazil-56%, USA-32%, Argentina-9%</td>
<td>Brazil (e.g. Borella, Sadia, Frangosul and Seara) competes on price and its products are acceptable to users in Singapore. The USA is now a niche player in retail channels.</td>
<td>Malaysian live chickens are imported and slaughtered in Singapore. This fresh chicken is the dominant product in the market and is in high demand based on traditional demand traits.</td>
<td></td>
</tr>
<tr>
<td>Net imports: 102,476 tons (Note: Chicken accounts for 99% of imports. Turkey and duck imports (net of re-exports) are niche markets.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market and Its Size</td>
<td>Major Countries</td>
<td>Supply Countries</td>
<td>Strengths of Key Supply Countries</td>
<td>Advantages and Disadvantages of Local Suppliers</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------------------</td>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Offal, frozen(not poultry)</td>
<td>Australia-26%, New Zealand-26%, Netherlands-11%, Denmark-10%, USA-2%</td>
<td>Private or retailer label packed frozen halal certified bovine offal, mainly imported from Australia, is readily available in supermarkets.</td>
<td>Offal from pigs slaughtered in Singapore dominates the market for such products. No substantial quantities of bovine offal are produced in Singapore.</td>
<td></td>
</tr>
<tr>
<td>Processed meats and poultry, not chilled</td>
<td>Thailand-47%, China-22%, Malaysia-15%, USA-6%, Brazil-3%</td>
<td>This market is dominated by a range of frozen, pre-cooked chicken and Asian-style canned products from Thailand (including Chareon Pokphand frozen products) and Malaysia (various brands), and canned products from China. The key non-Asian brands in this market are mainly canned beef and pork-based products, i.e. Spam (USA), Libby's (Brazil) and Tulip (EU produced).</td>
<td>Growing stronger on the new investments in production facilities for processed meats, both chilled and canned, underpinned by a strategy that the products are better quality than imported alternatives.</td>
<td></td>
</tr>
<tr>
<td>Market and Its Size</td>
<td>Major Countries</td>
<td>Supply</td>
<td>Strengths of Key Supply Countries</td>
<td>Advantages and Disadvantages of Local Suppliers</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------</td>
<td>--------</td>
<td>----------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Sausages, not fresh chilled</td>
<td>Brazil-34%, France-30%, USA-17%, Denmark-12%, Malaysia-4%</td>
<td>This is a price-driven commodity-type market, which is underpinned by strong physical distribution, gaining good access to retail display space and importantly, periodic price promotions. The highest profile supplies in frozen sausages are Perdix (Brazil), Doux(France) and Rockingham and Valley Chef, with Tulip(Denmark) being the leader in canned sausages. Retailer in-house labeled frozen sausages (produced in Brazil and Malaysia) are taking market share from imported brands. The USA lost market share to France in 2011 because of its higher pricing than French products.</td>
<td>The local sausage industry has a focus on producing premium fresh/chilled sausages and traditional dried Chinese-style sausages. Although a competitive industry, it does not compete directly with imported products, which tend to be either commodity products (frozen or canned frankfurters) or branded better quality &quot;more authentic&quot; chilled products.</td>
<td></td>
</tr>
</tbody>
</table>

Table 4 Overview of Competition in the Market Segment 112

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112 Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)
Local Competition

Goh Joo Hin maintains a strong and broad portfolio that includes well-known brands such as Mili and Maling, which performed strongly in shelf stable processed red meat and poultry.\textsuperscript{113}

Mili is a canned food product line managed and distributed by Goh Joo Hin Pte Ltd.\textsuperscript{114} It offers consumers a wide variety of canned foods in 6 broad product categories namely fruits, vegetables, vegetarian, meat, seafood and sauces.

Mili has a dynamic and broad brand portfolio and architecture that is responsive to the busy lifestyle and constantly changing cooking needs of today's consumers. It has an extensive range of 63 ingredient products and recipes which will continue to expand at a rate of 4 lines a year to meet consumers' needs and stay ahead of competitors.

Specific SPS and Customs Requirements

Singapore is considered a free port. There are no import duties imposed on food products.


The import, export and transshipment of meat and meat products are regulated by AVA, Quarantine and Inspection Department (QID), Import & Export Regulation Division (IERD), Food Section. Meat and meat products may be imported, exported and transshipped in frozen, chilled, processed or canned form. AVA (Meat) also regulates the import and transshipment of salted or preserved eggs and processed egg products.

Before importing meat into Singapore, it is essential to:

1. Apply for a trader’s license or register with AVA. Importers of processed food products and food appliances are required to first register with the Agri-Food & Veterinary Authority (AVA), Quarantine & Inspection Group (QIG).

   The authorities indicated that the purpose of the licensing system is to maintain a register of all importers for traceability purposes. For meat, fish/seafood, and fresh fruits and vegetables, licences are issued for one year. There is a registration fee of SGD84 for meat and fish products. A simple registration (free of charge) is required for the importation of other food items, including processed foods.

2. Comply with relevant food legislation; In the case of fresh and processed meat, three food acts apply: (i) Wholesale Meat and Fish Act; (ii) Sale of Food Act; (iii) Food Regulations

3. Meet AVA’s conditions for specific types of food; Meat and meat products can only be imported from accredited overseas establishments. The list of countries and establishments approved to export meat to Singapore is available on the AVA’s website.

4. Satisfy AVA’s labelling requirements;

5. Apply for an import permit. An import permit is required for every import consignment of processed food products or food appliances. Traders may apply for the import permits by declaring their food imports prior to importation into Singapore through the Tradexchange Portal. The system will then route the declaration to AVA for processing. Upon approval, the import permit for the consignment is incorporated in the Cargo Clearance Permit printed at the trader’s terminal. Importers may appoint an agent to apply for permits on their behalf.

   Supporting documents such as health certificates, laboratory analytical reports may be required for specific food products when applying for import permits. When submitting the documents, please state the Unique Reference No of the declaration & the AVA Registration Number on the top right hand corner of each document.

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All imported processed food products are subjected to inspection. Samples may be taken for laboratory analysis. In certain cases of the food items, a conditional approval message will be posted on the import permits to require traders to contact AVA for an inspection.

When preparing the import, export or transshipment permit application, you must declare the following:

(a) AVA (Meat and Fish) license no. in the License/Certificate no. field. For processed egg products and salted or preserved eggs, the registration no. for processed food products and food appliances must be keyed in.

(b) Product information in the:

- CA/SC Product Code field - e.g. MCF002 for frozen Chicken Breast, bone-in
- CA/SC Product Quantity field - net quantity at item level, e.g. 10.00
- CA/SC Product Unit of Quantity field - e.g. TNE
- CA/SC Code1 field - Establishment Code (consists of country code + processing plant no.)

The Agri-Veterinary Authority (AVA) of Singapore, the regulatory authority controlling the imports of food and beverage products into Singapore, does not impose onerous import requirements as it relates to sanitary and phytosanitary measures, although there have been concerns expressed by foreign exporters about the difficulty of meeting Singapore’s microbiological standards for meat exports. There have also been concerns surrounding AVA’s zero tolerance for salmonella enteriditis and extremely low tolerance for staphaureus in poultry meat to protect consumers from poor food handling and cooking practices. AVA also objects to the use of anti-microbial sprays on animal and poultry carcasses.

Singapore has also revised its import condition for bovine meat and related products. Singapore previously required six years of non-BSE detection in a country before re-establishing trade, but in 2006 established a minimal-risk rule in line with OIE

117 Switzerland Global Enterprise: "Food and Beverage Market Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)
guidelines. It has gradually reopened its market since then, and notified in May 2012 the withdrawal of the "six-year BSE freedom" certification. There are no BSE-related import restrictions on products from countries that are recognized by the OIE as having a negligible risk for BSE. For exporting countries that are recognized by the OIE as having a controlled or undetermined BSE risk, the AVA would evaluate their status following OIE guidelines and carry out an on-site inspection.

The AVA carries out inspections of food products and establishments in a risk-based manner. All food items are subject to traceability requirements, indicating the country of origin or the farm/establishment. Imports of dairy products, livestock, meat, and fish are considered to be "high risk" and are subject to strict controls, involving, inter alia, accreditation of foreign farms and establishments, inspection, and testing. Accreditation is carried out by the AVA based on risk assessment, including factors such as the veterinary infrastructure, disease status, legislation and other SPS measures, and hygiene. Meat imports are allowed only from accredited establishments in countries with which Singapore has protocol agreements. Chilled pig meat may only be imported from Australia, Canada, Denmark, New Zealand, Sweden, and the United States. Frozen beef, mutton, and poultry meat may be imported from a limited number of countries, and in some cases, only from AVA-accredited establishments. Imports of broiler chickens and ducks are only allowed from accredited farms in Malaysia.

Product-Specific Labelling

In the case of irradiated food, it is essential that the following guidelines are met as it pertains to labelling:

- There shall be written on the labels on or attached to a package containing food that has been processed by ionizing radiation, the following words, printed in letters of not less than 3 mm height: “TREATED WITH IONIZING IRRADIATION” or “IRRADIATED (here insert the name of the food)”. When an irradiated food is used as an ingredient in another food, this shall be so declared in the statement of ingredients. When a single ingredient product is prepared from a raw material which has been irradiated, the label of the product shall contain a statement indicating the treatment.

Distribution

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Traditionally Singaporeans shop for their fresh produce, meats and fish in wet market stalls. Over the last decade however, more and more household are turning to supermarkets for their fresh produce, meats and fish requirements. Generally, importers who represent foreign brands will be responsible for the market development of the brands, advertising and promotion and increasing distribution reach to all retailers.121

3.5 Olive Oil

Consumption

Palm oil is one of the most consumed cooking oils in the world, particularly in Asia. This is no different in Singapore where palm oil is one of the cheapest and most consumed oils on the market. It is the top choice for the food and beverage industry, from the roadside vendor frying banana fritters to the multinational company mass-producing chocolate for the world.122

Consumer Trends

- Healthier oil such as olive oil is now in vogue. Consumers are shifting preferences from palm oil, which is considered as high in saturated fat. In fact, research has shown that more and more Singaporeans are beginning to shift preferences to make olive oil a pantry staple.123

- In 2014, the Health Promotional Board in Singapore introduced the Healthier Ingredient Scheme in order to encourage the provision of healthier meals at foodservice outlets.124 Since the scheme covers cooking oil, consumers are able to identify if the meals are prepared using healthier cooking oil (oil with lower saturated fat etc.). Industry sources believe that olive oil producers could capitalize on this initiative.

Consumer Profiles

122 Inquirer Lifestyle: “Palm Oil helps increase good cholesterol” 7 March 2016 available at http://lifestyle.inquirer.net/224253/palm-oil-helps-increase-good-cholesterol#ixzz4Kqc2vUL6
123 The Finder: "5 things you should know about olive oil" May 2015 available at: http://www.thefinder.com.sg/house-home/kitchen/5-things-you-should-know-about-olive-oil
Findings from the 2010 National Nutrition Survey indicate that Singaporeans need to change to healthier types of fats and oils and reduce their overall calorie intake. It is also estimated that 7 in 10 Singaporeans consume too much saturated fat, hence the need to emphasize the quality of fat consumed rather than to consume less fat in general. As a result of this, EU olive oil producers stand to gain from this growing awareness of healthy oils.

**Information Note about Vegetable Oils in Singapore**

Cooking oils labeled as “vegetable oils” in Singapore are generally 100% palm oil, while blended oils are mostly palm oil. “Many snacks and even 3-in-1 coffee contain palm oil. It would be good to educate consumers to learn to check whether palm oil constitutes a major proportion of the ingredients in the food items they purchase and the healthier alternatives (such as canola oil, rice bran oil, soybean oil, sunflower oil or olive oil) they should choose from instead.

**Offer**

Oils and fats are expected to register a value compounded annual growth rate of 1% at constant 2015 prices over the period 2015-2020. Due to the government's awareness campaign which includes the introduction of the Healthier Ingredients Scheme and Healthier Choice Symbol logo, consumers are shifting to healthier oils and fats, which will support the better performance of oils and fats over the forecast period.

According to the AC Nielsen Retail Index Advisor (Singapore) 2012, the olive oil segment was the fastest growing segment of oils with an increase of 9.2% from 2011 to 2012.

**Imports**

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125 Health Promotion Board: “Find out more about my healthy plate” last accessed on 16 September 2016, available at: [https://www.ntu.edu.sg/Students/Undergraduate/StudentServices/HealthAndCounselling/Documents/HPB_MyHealthyPlate_FactSheet_FA(hires).pdf](https://www.ntu.edu.sg/Students/Undergraduate/StudentServices/HealthAndCounselling/Documents/HPB_MyHealthyPlate_FactSheet_FA(hires).pdf)

126 National University Health System: “Consumption of palm oil results in higher bad cholesterol than other vegetable oils low in saturated fat” 13 October 2015 available at: [http://www.nuhs.edu.sg/wbn SLOT U3819/Press%20Release%20-%20Consumption%20of%20palm%20oil%20results%20in%20higher%20bad%20cholesterol%20than%20other%20vegetable%20oils%20low%20in%20saturated%20fat.pdf](http://www.nuhs.edu.sg/wbn SLOT U3819/Press%20Release%20-%20Consumption%20of%20palm%20oil%20results%20in%20higher%20bad%20cholesterol%20than%20other%20vegetable%20oils%20low%20in%20saturated%20fat.pdf)


According to statistics retrieved from the International Trade Centre, imports of olive oil into Singapore (i.e. products that fall under HS 1509 and 1510) amounted to approximately EUR 8 million in 2011. By 2015, imports increased to approximately EUR 12 million. Imports came almost exclusively from EU countries. For olive oil that falls under the category HS 1509, Italy and Spain were the dominant market players and accounted for 42.4% and 40.8% of market share, respectively. Singapore imported 3021 tons of olive oil under HS code 1509 in 2015. On the other hand, for olive oil that falls under the category HS 1510, Spain and Italy were also the dominant players and accounted for 73.7% and 25.5%, respectively. Singapore imported 209 tons of olive oil under HS code 1510 in 2015.

**Competition**

Lam Soon (S) Pte Ltd maintained the leading position with a 27% value share in 2015. This is mainly due to the strong presence of the Knife brand in vegetable seeds oils and Naturel in regular spreadable oils (both brands carry the Healthier Choice Symbol logo). Sales of Naturel olive oil increased by 31% over between 2012 and 2013. The company’s wide product portfolio in oils and fats also caters to various consumer needs.

**Distribution**

Singapore’s distribution channels for consumer ready foods are now concentrated around supermarkets and hypermarkets. While there are alternative channels, e.g. the wet and dry markets, small “mom and pop” type shops, mini-marts and some specialty food and drinks shops, trade sources comment that these channels can no longer support certain imported products if the strategy is to build a sizeable market and share in the long term. Exporters have to accept that their brands and products have to be in

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130 Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)
Singapore’s main retailing channels, i.e. supermarkets and hypermarkets, if they want to have a successful and sustained future in the Singapore retail channels. As the major supermarket operators are heavily into premium and specialty products such as olive oil due to their market segmentation strategies, this position is broadly true for both niche and mass market type products.

### 3.6 Fresh Fruits and Vegetables

#### Consumption

Although Singapore’s population is relatively small at 5 million, compared to other South East Asian countries, its per capita disposable income was higher than any of the major ASEAN countries in 2010 by far. It was almost four and a half times greater than that of Malaysia, which ranked second highest. The country's overall consumption of food and beverages was just USD6.5 billion in 2010. However, per capita consumption of food and beverages is the highest in the region. Singapore’s real GDP growth was an impressive 14.5% in 2010, having only declined 0.8% in 2009.  

Asia Pacific accounts for nearly 81% of the global vegetable market consumption and for 68% of the global fruit market consumption. As freshness, nutrition and health consciousness gain recognition, 100% juice products and fresh fruit juice bars are becoming more popular in the region. Singaporeans are open to products from the developed countries that are high quality and value-for-money. In addition, as consumers become more affluent they purchase more premium juices.

In light of the overall trending towards healthier lifestyles and increased consumption of wellness products, fruits and vegetables hereby play a great role. Besides the most obvious category of price, the purchase decisions can be affected firstly by the ethical/ transparent farming methods since increasing number of consumers have interest in sustainable and fair manufacturing. Also packaging in relation to the client’s comfort and needs is relevant - bigger families will prefer larger quantities while single households will prefer smaller packages. The sale of smaller quantities per purchase will become more dominant since single households are anticipated to grow by 20.10% in 2015-2025 in Singapore. Recognizable and attractive package design is also a push factor for sales. Another purchase criterion is whether the fruit or vegetable is in-season or off-season that affects the products price, availability and quality. Customers are also affected by the nutrition value of the available product, variety present in a store, and the

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convenience to consume the product (ready-to-eat versus products requiring preparation).

**Consumer Trends**

With a large, affluent and sophisticated consumer base driven by rising disposable incomes, Singapore’s total consumer expenditure is estimated to grow at an average rate of 3.4% per year between 2013 and 2020, providing good opportunities for food-supplying businesses.\(^{132}\) A steady stream of international visitors and the tendency for local residents to eat out keep the foodservice sector vibrant. Also, international environment and wide exposure to foreign import goods and trends make the consumers very open to experiment and try out new products. Trends within fresh fruits and vegetables sector move towards nutritious, high-value goods for example increased consumption of fruit smoothies that include super-foods etc. According to Nielsen Global Health and Ingredient-Sentiment Survey 2016\(^{133}\), the top two diets among respondents were those with low/no fat or low/no sugar (28% and 25% respectively). One in five Singaporeans (20%) cited that they preferred a low/no carbohydrates diet. Additionally, 18% of locals stuck to a diet which has low salt/sodium while 11% adhered to a vegetarian diet. On the ingredients, a focus on simpler and fewer artificial or processed foods was a priority to many Singaporeans. MSG (64%), artificial preservatives (63%) and antibiotics or hormones (61%) topped the list of ingredients that locals tried to avoid. Singaporeans are more knowledgeable about food and have developed more sophisticated tastes; they are more willing to spend on premium and artisanal products which they perceive to be of higher quality\(^{134}\).

**Offer**

**Domestic Offer**


Singapore is the 14th largest exporter and the 15th largest importer in the world. With one of the highest per capita GDP’s on a Purchasing Power Parity (PPP) basis, (USD85, 700 2015 est.) in the world.\footnote{Food Export Association of the Midwest USA: “Singapore Country Profile,” 2015 available at: www.foodexport.org/get-started/country-market-profiles/southeast-asia/singapore-country-profile}

In the Singaporean juice market, Malaysia Dairy Industries Pte. Ltd retained its leadership in 2015 with a 28% off-trade value share. This can be attributed to aggressive marketing campaigns as well as the strength of the Peel Fresh brand in nectars and the Marigold brand in 100% juice. In addition, the company actively pushed for its 100% juice range by leveraging on the government’s attempt to encourage the purchase of Healthier Choice products.\footnote{Euromonitor International: “Juice in Singapore” February 2016, available at: www.euromonitor.com/juice-in-singapore/report}

\textit{Import}

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

Competition in Singaporean agricultural market is composed of countries which export high value consumer-oriented products. The United States, Australia, New Zealand, EU, Brazil, China and South Africa are major suppliers of fresh and processed fruits and vegetables in Singapore. As the market for consumer oriented products is very open and easily accessible, there is fairly quick entry for newcomers.\footnote{USDA Foreign Agricultural Service : Global Agricultural Information Service: "Singapore: Retail Foods: Annual 2015"10 December 2015 available at: http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Retail%20Foods_Singapore_Singapore_12-10-2015.pdf} Competition in some of the consumer product categories may sometimes be very intense.

In 2014 fresh fruits Net Imports accounted to $ 537,816,369. The 2014 market size (volume) for fresh fruits was 433,796 Metric Tons with an average annual import growth of 11%. The biggest importer was U.S with 19% of share, followed by China with 13%, Malaysia with 11% and Australia with 10%. While Singapore does not grow any fruits, the market is still very competitive with supplies from different sources such as China, Malaysia, Australia and South Africa.\footnote{USDA Foreign Agricultural Service : Global Agricultural Information Service: "Singapore: Retail Foods: Annual 2015"10 December 2015 available at: http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Retail%20Foods_Singapore_Singapore_12-10-2015.pdf}

In 2014 fresh vegetables Net Imports accounted to $ 432,589,425. The 2014 market size (volume) for fresh vegetables was 508,655 Metric Tons with an average annual import growth of -0.7%. The biggest importer was Malaysia, with 39% of market share, followed by China with 25%, Australia with 8% and Thailand with 5% of market share. Similarly to fruits, Singapore does not grow vegetables, yet again these main suppliers
have freight advantage in shipping these perishables while more distant suppliers as EU MS and U.S. have to air-fly their products which adds up to the price level.\textsuperscript{139}

**Export**

Singapore engages in very minimal agricultural production since it does not grow its own fruits or vegetables however, it still possesses significant role in regional trade because of its strategic geographic location. Singapore’s re-exports comprise between 45\%-50\% of total exports\textsuperscript{140}.

**Main Competitors**

Singapore’s retail sector is highly developed and competitive, total sales were USD5.5 billion in\textsuperscript{141}. The four major categories of retailers are: (1) large retailers including supermarkets and hypermarkets; (2) convenience retailers; (3) traditional stores and (4) specialty stores. Three of the leading enterprises in the F&B sector in Singapore are Dairy Farm International Holdings Ltd, NTUC FairPrice Co-operative Ltd and Sheng Siong Supermarket chain.

**Dairy Farm International Holdings Ltd** is a leading pan-Asian retailer. At 30th June 2016, the Group and its associates and joint ventures operated some 6,500 outlets and employed over 180,000 people. It had total annual sales in 2015 exceeding USD17 billion. The Group operates supermarkets, hypermarkets, convenience stores, health and beauty stores and home furnishings stores such as IKEA. In 2003 it acquired 35 Shop N Save supermarkets in Singapore increasing its supermarket network to 75 stores. In 2013 the Shop N Save supermarkets in Singapore were converted to the Giant brand.

**NTUC FairPrice Co-operative Ltd** is a Singapore-based investment holding company that, founded in 1973, remains the leading grocery retailer with a market share of 33\%. The FairPrice operates various F&B related outlets as supermarkets, department stores, and convenience stores in Singapore. Fairprice annual sales in 2014 were $1,830 through 291 stores, including 136 Cheers stores, 104 FairPrice supermarkets stores, 18 FairPrice Finest stores, 15 FairPrice Xpress stores, 7 FairPrice Xtra stores and 1 Warehouse Club store. FairPrice has also established an online sales platform. The company also owns properties and is involved in warehousing, distribution and trading activities.

\textsuperscript{139} Ibid.  
\textsuperscript{140} Food Export Association of the Midwest USA: “Singapore Country Profile” 2015 available at: www.foodexport.org/get-started/country-market-profiles/southeast-asia/singapore-country-profile  
\textsuperscript{141} Food Export Association of the Midwest USA: “Singapore Country Profile” 2015 available at: www.foodexport.org/get-started/country-market-profiles/southeast-asia/singapore-country-profile
Sheng Siong Supermarket is a local supermarket chain established in 1985. The chain’s revenue for FY2015 was over SGD 764 million. They operate the Sheng Siong Groceries Chain in 40 locations all across Singapore as of May 2016. They target lower income consumers in residential heartlands (subsidized apartments). They assortment also includes products meant for ancestral and religious worship such as joss paper, joss sticks, incense, oils, etc. They procure mainly from neighboring countries such as China, Malaysia, Indonesia, Thailand and Vietnam.

Challenges for EU Producers

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. 142

Specific Customs and SPS Requirements for Import

Agri-Food and Veterinary Authority governs food regulations, documentation and certification requirements on the exports of fresh products. Singapore food manufacturers are keen to invest in R&D to cater to wider consumer bases through improved packaging, and product shelf life, as well as adherence to strict food safety standards. Many are certified to international food safety standards as the Hazard Analysis and Critical Control Points (HACCP), ISO 22000 and BRC which help them gain a competitive edge in the global marketplace. 143

Singapore does not impose tariffs on imported fruits and vegetables; however, it levies a 7% Goods and Services Tax (GST) on all goods.

Distribution

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.\(^1\) FairPrice Finest usually uses direct sourcing, but will use some preferred agents for smaller volume supplies. The Cold Storage Group uses direct sourcing, as well as a preferred list of agents. Carrefour purchases products directly from supplier groups.\(^2\) According to the USDA Foreign Agricultural Service “Retail Report”\(^3\), agents and distributors bear advertising costs for the products that are placed in weekly advertisements. Furthermore, 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. As well as, agents or distributors pay for shelf space for their products in any store format.

Restaurant sales reported an increase of 10% for 2014 due to the greater influx of tourists and business arrivals. The key drivers of the foodservice industry are growth in tourism, a stable economic environment, increases in the female working population and a low level of inflation. The opening of the two integrated resorts; Marina Bay Sands and Resorts World Singapore and new leisure facilities; Gardens by the Bay and Marine Life Park, and shopping malls provided opportunities for further expansion by existing players and allowing new entrants into the market.\(^4\)

Singaporeans spend about USD5.7 billion annually eating out. Restaurants as a group account for 37%, while fast food outlets account for 13% of the total revenue in the food & beverage services industry. Food caterers take up a 12% share of the food and beverage industry. The Others Category consisting of cafes, coffee houses, food courts, coffee shops and eating houses take up 38% of the total. Since eating out in the


numerous cooked food stalls located round every corner of major housing residential estates is relatively inexpensive, most Singaporeans eat out at least once a day.\textsuperscript{148}

Much like the other major markets in the ASEAN region, wet markets are popular in Singapore’s rural areas and even urban neighborhoods. Traditional grocery retailers still hold around 20-30\% of the grocery market. Hypermarkets and supermarkets are very popular in urban areas, but wet markets and stalls are perceived to carry fresher meats and vegetables. Imported high-end grocery products can be found in specialist supermarkets such as FairPrice Finest and Jason’s Marketplace. Consumers in Singapore will mostly dine-out somewhere near their work for lunch, and will visit street stalls, hawker centres and food courts for dinner or a quick snack.\textsuperscript{149}

Singapore is a home for many populous "wet markets", attended in early morning hours starting from 4am up to midday, these mostly sell fresh fruits, vegetables, meats, fish, seafood, dry foods, spices etc. The “wet” markets differentiate from the modern retailers in lower price levels, in flux regulations on product packaging and labelling, as well as hygiene and food safety levels. At the same time, the markets offer great product versatility and fresh ingredients sold by merchants who can elaborate on the product background. Also, personalised service drives more customers to visit the markets because the customers can make individual orders and receive the goods in following days or week. Also, the “real” contact with fruits and vegetables, being able to look, feel and smell the goods stimulate purchases at traditional “wet” markets. The markets offer local fruits and vegetables, but also many imported goods from Malaysia, Thailand and even Europe. There markets are divided in to two sections: the wet area offering fruits, vegetables, meat, fish etc. and the dry area offering grain, herbs, spices, noodles etc. Usually, the price level at a particular market is formed in correlation with the share of quality import goods and the market popularity among tourists: the higher the latter, the higher the prices are. While some markets specialize in particular cuisine, for example in Chinese or Western appetites, some other focus on organic supply. Some of the fruit and vegetable selling Singaporean “wet” markets include: Ghim Moh Wet Market, Tekka Centre (Formerly KK Market), Empress Market (Popularly known as Farrer Market), Holland Village Market, Chinatown Market, Marine Parade Market, Tiong Bahru Market, Bedok South Wet Market and Geylang Serai Market.

Singapore is traditionally a free port with over 99\% of all imports being duty free. The most common way to enter the Singaporean market is to use a local agent or distributor. Other ASEAN countries can also be served through the Singaporean market. The Singaporean market is relatively small compared to the other four main countries in the ASEAN region. However, with its highly affluent population and array of upscale supermarkets with diverse product offerings, the Singaporean market may be more

\textsuperscript{148} Food Export Association of the Midwest USA: “Singapore Country Profile” 2015 available at: www.foodexport.org/get-started/country-market-profiles/southeast-asia/singapore-country-profile

suitable for Canadian food exports than other ASEAN countries. Traditional wet markets, sundry shops, and “mom and pop” shops are the most popular in terms of outlet numbers (representing 70% of all grocery outlets), but they cater to lower-income consumers. Therefore, modern grocery retail dominates Singapore’s market in terms of value sales. Hypermarkets have the highest sales in the modern grocery retail segment (USD1.6 billion in 2010, as shown on page 15), with FairPrice as the most popular chain. FairPrice generally caters to low- to mid-income consumers while FairPrice Finest supermarkets cater to high-income consumers, offering Swiss and European style bakeries and wine cellars. There are 6 FairPrice Finest stores in Singapore. The Cold Storage group (owned by Dairy Farm), which also owns Jason’s Market Place and Giant brand, offers many gourmet products catering to high-income expatriates, tourists, and Singaporeans. These stores are located in city centres, but Cold Storage retail outlets focus more on fresh foods, while Jason’s Market Place focuses more on organic, natural and premium products. Carrefour also offers foreign products and caters to middle- and upper-class citizens.\(^\text{150}\) Also, Cheers by FairPrice, a home grown 24-hour convenience store, caters to a diverse group of customers from students and working professionals who lead active and busy lifestyles. Officially launched in 1998, Cheers has since expanded to over 120 outlets situated across Singapore at convenient locations. Cheers is also an active advocate of sports, having supported badminton, rallying, Youth Olympic Games etc.

Top Grocery Formats in Singapore include:

\[\text{FairPrice xpress, 7-Eleven, Giant, Carrefour, Cold Storage, Carrefour Singapore, FairPrice Finest, Cheers by FairPrice, Hollands and Barrett, Jasons} \]

Due to the vast penetration of smartphones and other technological devices, shopping online, including food on e-commerce platforms is gaining popularity among individual

and commercial shoppers. In fact, the number of broadband access links exceeds the number of households in Singapore. Also the two largest Singaporean grocery chain owners, Dairy Farm International Holdings and FairPrice Co-operative, have internet grocery retail stores. Online grocery markets can benefit from the convenience of having only one centralized warehouse where goods are being distributed, instead of stocking and managing various stores across the country. However, online sales in the F&B sector is still in the developing phase which often means that the goods assortment online is smaller than in their physical outlets. However, in 2015 the estimated share of online grocers in the internet retail sales was 9 % and the internet retailing is expected to grow further in the coming years.

**FairPrice** online grocery sales were over USD17 million in 2010.

**PurelyFresh®** is an online grocery concierge service that mainly offers fresh vegetables and fruits, however their supply also includes seafood, meat, lentils, rice, poultry, dry grocery, etc. PurelyFresh® team, based in Singapore, composes of entrepreneurs who have owned a variety of wet and dry markets since 1998.

**Lazyfruits** an online fruits selling platform that provides customers an online shopping possibility with a delivery service within mainland Singapore & Sentosa Island. Minimum purchase from Lazyfruits per delivery is $50 and they charge a fee of $5 per delivery for orders below $75.

**Think Fresh Trading Pte. Ltd.** is a Singapore-based fresh fruits supplier and distributor to businesses and organizations including offices, restaurants, juice bars, cafes, hotels, supermarkets etc. With their online platform, they present another one stop solution to fulfill customers’ fruit needs. Think Fresh Trading charges a delivery fee of SGD20.00 if the purchase is less than SGD120.00.

**Thygrace Marketing** is a Singaporean fruit and vegetable supplier established in 1985. They supply homegrown and imported vegetables and fruits to supermarkets, hotels and restaurants. Their packed and labeled products are available in the following supermarkets: Cold Storage, Isetan and NTUC FairPrice. Thygrace also provides wholesale purchase options to supermarkets, caterers, hotels and restaurant businesses. Furthermore, with a set minimum delivery, they directly deliver Ready-To-Eat DIY salad packs, vegetables and fruits and whole kernel sweet corn (Cup Corn).
3.7 Processed Fruits and Vegetables

Consumption

In an increasingly health-conscious society, fruits and vegetables have a dominant role in the diet of Singaporean consumers. In 2011, the per capita consumption of fruit was 66 kg, while the per capita consumption of vegetables was 95 kg.\textsuperscript{151} This is a significant increase from 2007, when the per capita consumption of fruits and vegetables were respectively 72.3 kg and 85.7 kg.\textsuperscript{152}

In 2013, the average monthly expenditure on canned fruit, dried and preserved fruits and other processed fruit-based products was USD 2.6 (5.9\% of the total monthly expenditure on fruit), while expenditure on fresh fruits was USD 37.5. Singaporean households spent on average USD 11.7 on canned, frozen, dried, preserved and salted vegetables, processed bean products and other processed vegetable-based products, which made up 22.9\% of the total monthly expenditure on vegetables. In comparison, consumers spent USD 39.6 on fresh vegetables. An additional USD 4.4 per month was spent on fruit and vegetable juices.\textsuperscript{153}

Consumer Trends: Health conscious consumers that seek convenience

The health and wellness awareness trend in Singapore positively influences the demand for processed fruit and vegetables. As a result of their increased health consciousness, consumers are increasing their intake of fruits and vegetables. Government campaigns to promote healthy eating habits have also contributed to the popularity of this trend in recent years. There have been several programmes targeting consumer's eating habits and food choices over the past years: My Healthy Plate, Healthy Eating Every Day and Shop Health, Get Rewarded.\textsuperscript{154}

In addition to the nutritious value of food, convenience is also important for Singaporean consumers. There is a general trend towards working longer hours and busier lifestyles in Singapore, which has led consumers to seek to save time on daily tasks, such as grocery shopping and cooking. This has positively impacted the demand for processed fruits and vegetables, as these are considered to be more convenient and quicker to prepare than fresh fruits and vegetables. Another important benefit of processed fruits

\textsuperscript{151} Central America Data.com: “Singapore buys more vegetables and canned fruits” 9 December 2013 available at: \url{http://www.centralamericadata.com/en/article/home/Singapore_Buys_More_Vegetables_and_Canned_Fruits}
\textsuperscript{152} International Food Research Journal: “Food consumption and expenditure in Singapore: Implications for Malaysia’s agricultural exports” 2009 available at: \url{http://www.ifrj.upm.edu.my/16(2)2009/01-IFRJ-2008-148_Tey_Malaysia_2nd_proof.pdf}
and vegetables is the generally longer shelf life compared to fresh fruits and vegetables, and the wide range of products that is available.\textsuperscript{155}

However, there is also a trend that could negatively influence the demand for processed fruits and vegetables. As a result of the rising incomes and improvement to the distribution system, fresh and chilled fruits and vegetables are becoming both more affordable and accessible. The fresh produce is considered to be healthier than the processed variants, and therefore substitute the use of processed fruits and vegetables.\textsuperscript{156} Even professionals with busy lifestyles resort to buying fresh products and then freeze them themselves for later consumption.\textsuperscript{157}

To compete with the increasing interest in fresh fruits and vegetables, the prices of processed fruits and vegetables are kept low. With frequent price promotions and marketing activities, companies hope to retain consumer’s interest in their products. This makes processed fruits and vegetables affordable and accessible for all income classes.\textsuperscript{158}

\textbf{Offer}

Singapore is a land and resource-scarce country with virtually no agriculture, livestock farming and aquaculture. Local producers produce about 8\% of the total leafy vegetables consumed in Singapore. The Agri-food & Veterinary Authority of Singapore (AVA) aims to raise self-sufficiency in this respect to 10\%.\textsuperscript{159} The vegetables produced in Singapore are bean sprouts, bayam, cai xin, kai lan, bai cai and xiao bai cai.\textsuperscript{160}

Regarding processed fruits and vegetables, Singapore has a fruit juice industry. Among the main producers in this market are F&N Food, Malaysia Dairy Industries and Pokka Singapore. It does not produce any canned fruits and vegetables.\textsuperscript{161}

\textbf{Import}

\textsuperscript{159} AVA: “The Food We Eat” 21 December 2015 available at: \url{http://www.ava.gov.sg/explore-by-sections/food/singapore-food-supply/the-food-we-eat}
\textsuperscript{161}Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: \url{http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf}
Singapore’s import of processed fruits and vegetables has steadily increased over the past five years. Between 2011 and 2015, the import value increased with 52.6% from EUR 207 million to EUR 315 million. In 2015, the USA held a share of 19% of total imports, followed by Indonesia with 17.7%. Other main exporters of processed fruits and vegetables to Singapore are Malaysia (16%), China (14.7%) and Thailand (7.4%).

![Figure 16 Singapore’s Imports of Fruit and Vegetable Preparations (2011-2015)](image)

In terms of quantity, fruit and vegetables juices were the main import product in 2015 and accounted for 42% of the total import of fruit and vegetable preparations. This product group was followed by other preserved fruits, meaning fruits preserved not by sugar including pineapple, peaches and cherries, which held a 25% share. Other preserved vegetables, meaning vegetables not preserved or prepared in vinegar such as olives, potatoes and vegetable mixes, constituted 21% of the imports. Both prepared and preserved mushrooms and truffles and jams, jellies and marmalades made up 3% of the import. Lastly, fruits preserved by sugar, prepared and preserved tomatoes and vegetables preserved in vinegar accounted for merely 2% of the total imports in 2015.

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The EU’s exports of fruit and vegetable preparations to Singapore are relatively small, but have steadily grown over the past five years. In 2011, the value of the EU export of fruit and vegetable preparations to Singapore was EUR 13 million. This number had almost doubled by 2015 to EUR 23 million, which constituted 1.1% of the EU’s total agri-food export to Singapore.

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The main EU Member States that export fruit and vegetable preparations to Singapore are Italy (which in 2015 held a share of 1.7% of total imports), France (1.3%), the Netherlands (1.1%), Belgium (1%) and the United Kingdom (0.8%). Italy mainly exports prepared and preserved tomatoes as well as other preserved vegetables to Singapore. The main export products of France are jams, fruit jellies and marmalades. The Netherlands and Belgium both mainly export fruit and vegetable juices and other preserved vegetables. Lastly, the United Kingdom mainly exports its other preserved vegetables and jams, fruit jellies and marmalades.

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Export

Singapore’s export of processed fruits and vegetables has also steadily increased over the past five years. The export value increased with 73% from EUR 78 million in 2011 to EUR 135 million in 2015. Singapore mainly exported to Malaysia, which held a share of 20.8% of total exports in 2015, followed by the USA with 18.4%. Other main importers are China (6%), Indonesia (5.5%) and Australia (4.9%).

![Figure 20 Singaporean Exports of Fruit and Vegetable Preparations (2011-2015)](image)

The main export product in terms of quantity are fruit and vegetable juices, which accounted for more than half (54%) of Singapore’s fruit and vegetable preparations exports in 2015. This product group was followed by other prepared or preserved fruits, which constituted 35% of the total exports. A 6% share was held by other preserved vegetables, followed by fruits preserved by sugar, which accounted for 2%. Prepared and preserved tomatoes, mushrooms and truffles and jams, jellies and marmalades all held a 1% share. Lastly, vegetables preserved in vinegar only made up 0.4% of the total.

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166 Trade Map “Preparations of Vegetables, Fruits and Nuts Export Singapore” last accessed on 12 September 2016, available at [www.trademap.org](http://www.trademap.org)
Singapore’s export of fruit and vegetable preparations to the EU is relatively limited. The main importing EU Member States is the Netherlands, which held a 3.2% share in Singapore’s total exports of fruit and vegetable preparations in 2015. Other EU Member States that import these products from Singapore are the United Kingdom (3.1%), France (1.7%), Belgium (0.3%) and Germany (0.2%). These EU Member States mainly import other preserved fruits and fruit and vegetables juices from Singapore.

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Labelling

The list of Geographical Indicators in the EU-Singapore FTA includes a number of European fruits and vegetables, both fresh and processed, for example the Italian Cappero di Pantelleria and the Austrian Steirischer Kren.\textsuperscript{169}

Main competitors on the market

The main player on Singapore’s market for processed fruits and vegetables is the Singaporean company Goh Joo Hin Pte Ltd. The company held a retail value share of 15% in 2015, which can be attributed to its low prices for processed fruit and vegetables and well-established distribution network. Goh Joo Hin holds the popular brand for fruit and vegetables preparations, Mili. The brand is targeted at families from all income classes.\textsuperscript{170} Another important player on the market is the Singaporean company Hosen Group.

\textsuperscript{168} Trade Map: “Preparations of Vegetables, Fruits and Nuts Export Singapore” last accessed on 12 September 2016, available at www.trademap.org
Malaysia Dairy Industries Pte Ltd is the main competitor on the market for fruit and vegetable juices. In 2015, the company held a 28% retail value share. Euromonitor attributes Malaysia Dairy Industries’ leading position to its aggressive marketing campaigns and its strong brands Peel Fresh and Marigold.\(^{171}\)

**Specific customs and SPS requirements**

The import of processed fruits and vegetables to Singapore is administered by the Agri-Food & Veterinary Authority of Singapore (AVA). The importer must register with AVA and additionally register with Singapore Customs to obtain an import permit and make customs payments. In order to apply for a permit or certificate, the importer must register as a declaring agent. All customs procedures, including permit applications, go through the Singapore Customs’ electronic TradeNet system, for which certified software must be purchased.\(^{172}\)

The following documents may be required when exporting processed fruit and vegetables to Singapore:

- Registration of Importers of Processed Food Products and Tableware;
- License to Deal in Artificial Sweetening Agents;
- CITES Permit for Flora Species;
- Certificate of Analysis;
- License to Import Irradiated Food; and
- Certificate of Irradiation for Foodstuffs.

For more information, please check the European Commission Market Access Database: [here](#).

**Challenges for EU products**


EU companies that wish to export their processed fruits and vegetables to Singapore might face some challenges.

First of all, while the Singaporean market is very open and has little barriers to entry, the country has established relatively rigorous regulations regarding processed food. Importers must be able to prove that their products have been produced under proper sanitary conditions. An importer must therefore be able to present a certificate from the food safety authority of the country of origin to prove that the imported product was produced or manufactured by a licensed or regulated premise.173

Secondly, the main competitors on the market are well-established and have built a good reputation in Singapore. They employ aggressive marketing strategies to sustain and expand their market share. Furthermore, in order to compete with fresh fruits and vegetables, prices are kept low. This leads to a situation where the costs of entry in the market are high, while profits are potentially low.

**Distribution**

As a land and resource scarce country, Singapore imports about 90% of all food consumed. The import-oriented country therefore has a well-developed transport infrastructure and distribution system. Its high-quality transport infrastructure was ranked third out of 140 in the 2015 World Economic Forum Global Competitiveness Index. Singapore also has a highly developed and sophisticated cold chain distribution system, which has contributed to the country’s position as a hub for perishable products to be exported to other parts of the world.174

Companies seeking to export to Singapore often use local distributors who will manage the importing, storage and distribution of the products. It is advised to work with one distributor and to choose one with an established network to reach your target market segment. Major distributors that distribute processed fruits and vegetables are: Interstate Market Pte Ltd; Q.B. Food Trading Pte Ltd; Culina Pte Ltd; Auric Pacific Marketing Pte Ltd; and Angliss Singapore Pte Ltd.175

**Retail**

As a result of their busy lifestyles, Singaporean consumers highly value the ease of shopping in supermarkets, hypermarkets and online, where they have access to a wide range of products at affordable prices.176

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173 Hawksford: “Importing Food Products into Singapore” available at: https://www.guidemesingapore.com/industry-guides/restaurant/importing-food-products-into-singapore
2015, the offline grocery market in Singapore was valued at SGD 8 billion (EUR 5.2 billion), while the online grocery market was valued at SGD 120 million (EUR 78.5 million).¹⁷⁷

Three companies dominate the offline grocery retail sector with several supermarket and hypermarket chains. The largest retail company is NTUC FairPrice, which has the most extensive consumer reach and targets all income segments. The FairPrice Group operates FairPrice Supermarkets; FairPrice Xtra hypermarkets; and FairPrice Xpress and Cheers convenience stores. The FairPrice Finest supermarkets aim to target middle income consumers and provide a wide assortment of fine food. The second largest player on the market is the Dairy Farm Group which also targets consumers across all income segments. The Group operates Cold Storage supermarkets, Market Place supermarkets, Giant hypermarkets and 7-Eleven convenience stores. The third largest company is Sheng Siong Supermarket, which specifically targets low income consumers. Sheng Siong Supermarkets offer a wide range of products from neighbouring countries.¹⁷⁸

![A Cold Storage supermarket (left) and a 7-Eleven convenience store (right)](image)

E-commerce is becoming increasingly popular in Singapore as consumers are looking for more convenience and are getting more comfortable with internet and mobile payment methods.¹⁷⁹ Due to the country’s well-developed distribution system and refrigerated deliveries, consumers are increasingly purchasing their groceries online.¹⁸⁰

Some supermarkets have set up a web shop, for example FairPrice Online and Cold Storage Online, while other online retailers such as RedMart and Honestbee are also

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important players in the market.\textsuperscript{181} In 2015, RedMart launched RedMart Marketplace, allowing independent sellers to sell their products on the RedMart website and to use its delivery channels.\textsuperscript{182}

\textbf{Challenges for EU products}

The Singaporean market for processed fruits and vegetables can be interesting for EU companies because incomes continue to rise and consumers continue to increase their fruit and vegetable intake. Due to the land and resource scarcity, the demand for imports will remain stable. The market is very open and has very few barriers to entry.

This has led to a very competitive environment and causes challenges for EU companies that wish to export to Singapore. Supermarket and hypermarket operators control the retail market and access to consumers, which gives them a strong bargaining power over suppliers of all food and drinks, including processed fruits and vegetables. As a result, the costs for entry into the market and maintaining a market share can be very high. This can be especially burdensome for smaller producers.\textsuperscript{183}

\subsection*{3.8 Dairy Products}

\textbf{Consumption}

Dairy consumption in Singapore, as in the rest of the region, is relatively low compared to consumption in the rest of the world. In 2012, dairy consumption in Singapore was 32 kg per capita, only a third of the world average of 108.7 kg per capita. The average dairy consumption in Asia was 73.1 kg per capita. While some Asian countries have a relatively high dairy consumption, such as Japan at 85 kg per capita, the Southeast Asians consume significantly less dairy products. However, considering that dairy consumption is Indonesia and the Philippines is 14 kg per capita, and Vietnamese consumers are consuming 15 kg per capita, Singapore’s consumption is still relatively

\begin{footnotesize}
\begin{itemize}
\item \textsuperscript{181} Today: “Online grocery stores heading for the fast lane” 14 March 2016 available at: \url{http://www.todayonline.com/business/online-grocery-race}
\item \textsuperscript{182} Deal Street Asia: “Online grocery store RedMart launches Marketplace for independent sellers” 28 July 2015 available at: \url{http://www.dealstreetasia.com/stories/redmart-launches-marketplace-for-independent-sellers-9688/}
\item \textsuperscript{183} Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: \url{http://www.s-ge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf}
\end{itemize}
\end{footnotesize}
Dairy consumption in Singapore is expected to increase further at a rate of 6 to 8 % per year.\(^{185}\)

In 2013, the average monthly expenditure on dairy products was USD 43.4. Of this amount, USD 37.3 was spent on milk and USD 6.1 was spent on other dairy products (including soy milk products).\(^{186}\)

**Consumer Profile**

Dairy products are popular among a wide range of Singaporean consumers, though they are especially popular among consumers from the middle and higher class. Middle and higher class consumers also tend to follow the health and wellness trend, thereby looking for healthier products, including yoghurt and drinking milk products. Moreover, in particular professionals and single adults are willing to spend a large part of their income on quality dairy products, such as specialty cheeses. Another important group of consumers are expatriates. Singapore is home to a large number of expatriates that are looking to buy western products and western-style foods, which typically use dairy products.\(^ {187}\)

**Consumer Trends: Health conscious consumers and westernised diets**

Dairy products are not a traditional part of the Asian diet; more than 90 % of the South-East Asians are thought to be lactose intolerant.\(^{188}\) However, dairy products are gaining popularity and have become regular products in the Singaporean households. Several trends that contribute to this development can be identified.

The consumption of dairy and milk is influenced by the economic performance of a country and the consumer purchasing power. Singapore has one of the highest per capita incomes in the world and a high consumer purchasing power. Over the past years, incomes in Singapore have been rising further and private consumption is expected to grow at 4.2% per year till 2020. As a result, there is a strong demand for dairy products and demand is expected to continue to grow over the next years.\(^{189}\)

A health and wellness trend has been on the rise in Singapore and consumers are increasingly buying healthier products. As a result of greater awareness of the benefits


\(^{188}\) Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0.pdf)


of dairy products, including as an important source of calcium, Singaporean consumers are incorporating the consumption of dairy products in their daily routines. Of particular interest to them are fortified and low-fat dairy products such as milk and yoghurt. This trend is especially popular among high-income households, families with young children and professionals.

Another trend that positively impacts the dairy consumption in Singapore is the introduction of western-style food and dishes, such as pizza, pasta and cakes, which commonly use dairy products, in particular cheese, milk and cream. This trend can be attributed to the increasing popularity of western food among Singaporeans and the growing expatriate community in the country. As a result of its increasing popularity, the number of Western fast food and coffee chains as well as frozen yoghurt shops in Singapore is rapidly rising, further increasing the demand for cheese, fresh milk and yoghurt.

A trend that could negatively impact the dairy consumption in Indonesia is the increasing popularity of soy products. This trend especially affects the market for desserts, as bean curd and soy bean pudding have become favourites among Singaporean consumers.

### Challenges and opportunities for EU companies

Compared to the world average, dairy consumption in Singapore is relatively low. It is expected to rapidly increase over the next years as a result of rising incomes, more health conscious consumers and westernised diets. In this sense, Singapore provides important opportunities for EU companies that wish to expand their business. However, there are some challenges for EU dairy producers that wish to export their products to Singapore. It is argued that the Singaporean market for dairy products, especially yoghurt and sour milk products, is close to mature. Consumers are therefore looking for innovative but also premium and high-quality products. To gain ground in the Singaporean market, it is therefore important to offer interesting products as well as invest in product development and marketing. Additionally, it can be important to cater the products to consumer taste and preferences.
Offer

Singapore is a land and resource-scarce country with virtually no agriculture, livestock farming and aquaculture. There is no milk production but Singapore does import ingredients to be further processed into dairy products.\(^{196}\) Singapore does not produce any packaged cheeses or butter, but does produce yoghurt. Local yoghurt producers have tailored their products to local taste.\(^{197}\)

Import

In terms of quantity, concentrated milk and cream was the main import product in 2015 and accounted for 46\% of the total dairy import. This was followed by the import of non-concentrated milk and cream at 27\% and whey which made up 11\% of the total dairy import in terms of quantity. Butter constituted 7\% of the import, followed by buttermilk, curdled milk and cream and yoghurt (hereafter referred to as ‘buttermilk’) at 5\%. The import of cheese and curd accounted for 4\% of the total dairy imports.

\[\text{Figure 23 Percentage Share of Imports of Dairy Products, in terms of quantity (2015)}^{198}\]

Singapore mainly imports its dairy products from Australia and New Zealand. This can be explained by these market’s geographic proximity and longstanding trade relations, including the ASEAN-Australia-New Zealand Free Trade Agreement. Increased import of


\(^{197}\)Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)

\(^{198}\)Trade Map: “Dairy Produce Import Singapore” last accessed on 12 September 2016, available at [www.trademap.org](http://www.trademap.org)
dairy from Indonesia, especially non-concentrated milk and cream, can be expected in the coming years. While in 2015, Indonesia’s share in the total import of non-concentrated milk and cream was only 5.7%, expanding dairy producers in Indonesia are determined to enter the Singaporean market. Due to its proximity, Indonesian products could be shipped more efficiently and faster compared to products coming from Australia and New Zealand.\textsuperscript{199}

For certain dairy products, including concentrated and non-concentrated milk and cream, cheese and curd, butter and whey, the EU Member States are significant trading partners. The total export value of EU dairy products to Singapore has increased slightly over the past five years: from EUR 137 million in 2011 to EUR 143 million in 2015. However, compared to 2014 the total value decreased by 13.3%. In 2015, dairy products made up 7.1% of the total EU agri-food export to Singapore. As displayed in the figure below, the export of cheese and fresh milk has slightly increased over the past years, while the export of butter and milk powder and whey has decreased.

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure24.png}
\caption{EU Exports of Dairy Products to Singapore (2011-2015)}\textsuperscript{200}
\end{figure}

Singapore imports large quantities of concentrated milk and cream. In 2015, the value of the import of these products was EUR 329 million. This demonstrates a decrease of 31.3% compared to 2014, but only a decrease of 17.2% compared to 2011. The main exporters of concentrated milk and cream to Singapore are New Zealand (with a 47.7% share in 2015), Australia (17.6%) and Ireland (6.2%). Other main EU exporters are the Netherlands (4.7%), France (3.6%), Germany (2.9%) and Denmark (2.5%).

\textsuperscript{199} Today: "Dairy farms to expand in Asia as milk consumption increases" May 2014 available at: \url{http://m.todayonline.com/business/dairy-farms-expand-asia-milk-consumption-increases}

In the past five years, the import of non-concentrated milk and cream increased significantly: In 2011 Singapore’s import of non-concentrated milk and cream was valued at EUR 60 million which increased to EUR 93 million in 2015. Singapore mainly imports non-concentrated milk and cream from Thailand (a 36.5% share), Australia (27.7%) and France (7.1%). Other EU Member States that held a share in Indonesia’s non-concentrated milk and cream import in 2015 include Germany (3.1%), the United Kingdom (2.9%) and the Netherlands (1.1%).

The import of butter has decreased slightly over the past five years: In 2015 the imports were valued at EUR 93 million compared to EUR 96 million in 2011. The main exporters of butter to Singapore are New Zealand (34.5%), the Netherlands (22.6%) and Australia (18.8%). France (12.1%) also holds a significant share, while other Member States such as Belgium, Denmark and Germany hold a significantly smaller share between 1.8 and 1.5%.

Whey imports have increased by 7.6% since 2011 to reach EUR 81 million in 2015. New Zealand held the largest share and provided 34.1% of the total whey imports in 2015, followed by the USA with 26.9%. The EU Member States held significantly smaller shares: Germany’s exports to Singapore constituted 11% of the total whey imports, followed by France (4.5%), the Netherlands (2.8%) and Finland (2.6%).

Between 2011 and 2015, Singapore’s import of cheese and curd increased by 33.2% from EUR 56 million in 2011 to EUR 75 million in 2015. Singapore mainly imports their cheese and curd from Australia (36.8% of the total imports in 2015), New Zealand (15.3%) and France (10.9%). Other EU exporters are Italy (7.9%), Denmark (4.8%) and Germany (3.2%).

The market for buttermilk is significantly smaller but has faced a strong increase in imports over the past five years. Between 2011 and 2015, the import value of buttermilk increased by 53.3% to EUR 38 million in 2015. The main exporters of buttermilk to Singapore are Australia (31.2%), Malaysia (22.9%) and Thailand (10.9%). The EU Member States export somewhat less buttermilk to Singapore: France’s share was 2.9%, followed by Germany (2.6%) and the United Kingdom (1.9%).

**Export**

Singapore’s export of dairy products is rather limited and is mainly focused on other Asian countries, such as the Japan, Malaysia and Viet Nam. The EU Member States’ imports of Singaporean dairy products are very limited.
In 2015, the main export product in terms of quantity was non-concentrated milk and cream, which made up 77% of the total dairy exports. The exports were valued at EUR 155 million in 2015, demonstrating a decline of 14.1% since 2011, when the exports were valued at EUR 180 million. The main importers of Singaporean concentrated milk and cream are Japan, Viet Nam and Malaysia. In 2015, Singapore exported EUR 42 000 worth of concentrated milk and cream to the Netherlands, and EUR 1 000 to France.

The second most exported product in 2015 was whey, which accounted for 8%. The export value of whey has increased by 30.5% since 2011 to EUR 18 million in 2015. Singapore mainly exports its whey to Japan, Egypt and Viet Nam.

The export of butter constituted 7% of the total dairy exports and was valued at EUR 23 million in 2015 compared to EUR 20 million in 2011. The main importers of butter from Singapore are Japan, Viet Nam and Malaysia. The only EU Member State to import Singaporean butter in 2015 was France, whose imports were valued at EUR 36 000.

Between 2011 and 2015 the export of non-concentrated milk and cream more than doubled: In 2011 Singapore’s exports were valued at EUR 2.7 million, which increased to 6.1 million in 2015. In terms of quantity, these exports account for 3% of the total export. Singapore exports these products to Viet Nam, Malaysia and Cambodia.

Buttermilk exports account for 3% of the total exports in terms of quantity. In the past five years, the value of these exports has increased significantly by 87.4% to EUR 4.9 million in 2015. The Philippines, Brunei Darussalam and Myanmar are the main importers of buttermilk from Singapore.

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201 Trade Map: “Dairy Produce Export Singapore” last accessed on 12 September 2016 available at [www.trademap.org](http://www.trademap.org)
Lastly, the export of cheese and curd only constitutes 2% of the dairy exports, but has significantly increased in value between 2011 and 2015. The value of Singapore’s export of cheese and curd has more than doubled from EUR 6.8 million in 2011 to EUR 14 million in 2015. Singapore mainly exports its cheese and curd to Malaysia, Thailand and Indonesia. Italy held a small share in the Singaporean export of cheese and curd for an import value of EUR 20 000.

**Labelling**

The list of Geographical Indicators in the EU-Singapore FTA includes a number of European cheeses: Danablu; Feta; Mahón-Menorca and Queso Manchego; Comté, Reblochon de Savoie, Roquefort, Camembert de Normandie, Brie de Meaux and Emmental de Savoie; Provolone Valpadana, Taleggio, Asiago, Fontina, Gorgonzola, Grana Padano, Mozzarella di Bufala Campana, Parmigiano Reggiano, Pecorino Romano, Pecorino Sardo and Pecorino Toscano; and Queijo S. Jorge.

**Main competitors on the market**

The main players on the Singaporean market can be divided by the following product categories: drinking milk products; yoghurt and sour milk products; cheese; and other dairy products, including for example cream and coffee whitener.

The main competitor on the market for drinking milk products is the Singaporean company F&N Foods Pte Ltd., which held a 27% retail value share in 2015. The company holds several popular brands in the market: Magnolia, Nutrisoy, Daisy, Farmhouse and Seasons. Due to its size, F&N Food can leverage economies of scale, leaving a larger budget for product development and marketing. These efforts, along with the company’s

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longstanding history in Singapore, have made the company and its brands well-known among Singaporean consumers.\textsuperscript{203}

In the market for yoghurt and sour milk products, the main player is Yakult, which has its origin in Japan. In 2015, Yakult held a value share of 49\%. Its popularity in Singapore can be attributed to its longstanding history in the country: Yakult has been on the market in Singapore since 1979 and started a home delivery service in 1986. The company furthermore invests actively in marketing and factory tours. Another important player on the market is Malaysia Dairy Industry, which held a 29\% value share.\textsuperscript{204}

Kraft Foods, an American company, is the leading company in the market for cheese. In 2015, the company held a value share of 29\%. Kraft’s processed cheese and spreadable processed cheese, for example Kraft Singles and Philadelphia, were especially popular among Singaporean consumers. The company’s packaged hard cheese is performing less and its value share has fallen slightly in recent years.\textsuperscript{205}

\textbf{Kraft Foods Spreadable Cheese and Processed Cheese}

In the market for other dairy products, including for example condensed milk, cream and coffee whitener, the main competitor on the market is F&N Foods with a 35 \% retail value share in 2015. This market share can be attributed to the popularity of its condensed milk products under the brands Milkmaid and Carnation. These two brands held a 62\% value share on the market for condensed milk.\textsuperscript{206}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{kraft_cheese.jpg}
\caption{Kraft Foods Spreadable Cheese and Processed Cheese}
\end{figure}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{f&n_dairy.jpg}
\caption{F&N Foods Dairy Products}
\end{figure}

Specific Customs and SPS Requirements for Import

The import of animal products to Singapore is administered by the Agri-Food & Veterinary Authority of Singapore (AVA). The importer must register with AVA and additionally register with Singapore Customs to obtain an import permit and make customs payments. In order to apply for a permit or certificate, the importer must register as a declaring agent. All customs procedures, including permit applications, go through the Singapore Customs’ electronic TradeNet system, for which certified software must be purchased.

The following documents may be required when exporting dairy products to Singapore:

- Registration of Importers of Processed Food Products and Tableware;
- License to Import Irradiated Food;
- Certificate of Irradiation for Foodstuffs;
- Certificate of Analysis;
- Free Sales Certificate;
- License to Deal in Artificial Sweetening Agents;
- Veterinary Health Certificate for Animal Products;
- License to Possess Veterinary Biologics; and
- Import Permit for Veterinary Biologics and Certain Animal Products.

For more information, please check the European Commission Market Access Database: [here](https://www.wto.org/english/tratop_e/tpr_e/s343_e.pdf)

Distribution

As a land and resource scarce country, Singapore imports about 90% of all food consumed. The import-oriented country therefore has a well-developed transport infrastructure and distribution system. Its high-quality transport infrastructure was ranked third out of 140 in the 2015 World Economic Forum Global Competitiveness Index. Singapore also has a highly developed and sophisticated cold chain distribution system.

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system, which has contributed to the country’s position as a hub for perishable products to be exported to other parts of the world. As a result, dairy products can easily be transported and reach consumers throughout the country.

Companies seeking to export to Singapore often use local distributors who will manage the importing, storage and distribution of the products. It is advised to work with one distributor and to choose one with an established network to reach your target market segment. Major distributors that distribute dairy products are: Q.B. Food Trading Pte Ltd, Benfoods (S) Pte Ltd, Culina Pte Ltd, Auric Pacific Marketing Pte Ltd, and Angliss Singapore Pte Ltd.

**Retail**

As a result of their busy lifestyles, Singaporean consumers highly value the ease of shopping in supermarkets, hypermarkets and online, where they have access to a wide range of products at affordable prices. In 2015, the offline grocery market in Singapore was valued at SGD 8 billion (EUR 5.2 billion), while the online grocery market was valued at SGD 120 million (EUR 78.5 million).

Three companies dominate the offline grocery retail sector with several supermarket and hypermarket chains. The largest retail company is NTUC FairPrice, which has the most extensive consumer reach and targets all income segments. The FairPrice Group operates FairPrice Supermarkets; FairPrice Xtra hypermarkets; and FairPrice Xpress and Cheers convenience stores. The FairPrice Finest supermarkets aim to target middle income consumers and provide a wide assortment of fine food. The second largest player on the market is the Dairy Farm Group which also targets consumers across all income segments. The Group operates Cold Storage supermarkets, Market Place supermarkets, Giant hypermarkets and 7-Eleven convenience stores. The third largest company is Sheng Siong Supermarket, which specifically targets low income consumers. Sheng Siong Supermarkets offer a wide range of products from neighbouring countries.

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209 Switzerland Global Enterprise: "Food and Beverage Market Singapore" June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)


212 Switzerland Global Enterprise: "Food and Beverage Market Singapore" June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf)
E-commerce is becoming increasingly popular in Singapore as consumers are looking for more convenience and are getting more comfortable with internet and mobile payment methods. Due to the country’s well-developed distribution system and refrigerated deliveries, consumers are increasingly purchasing their groceries online.

Some supermarkets have set up a web shop, for example FairPrice Online and Cold Storage Online, while other online retailers such as RedMart and Honestbee are also important players in the market. In 2015, RedMart launched RedMart Marketplace, allowing independent sellers to sell their products on the RedMart website and to use its delivery channels.

Food service industry

In addition to retail, a large quantity of dairy is consumed through the food service industry. Western fast food restaurants, coffee shops and frozen yoghurt shops are rapidly increasing in number and use large quantities of cheese, fresh milk and yoghurt.

The food servicing industry plays an important role in the lives of many Singaporeans: 67% of the Singaporeans eat out at least once a week, and 30% eat out three or more times a week. In 2013, the average monthly expenditure on food serving services was USD 764.4, making up 16.2% of the total average expenditure per month. An average of USD 266.6 per month is spent in restaurants, cafes and pubs, while USD 45.7 is spent in fast food restaurants. Singaporeans spend 57.7% of their total monthly

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spending on food serving industries (USD 440.9) at hawker centres, food courts, coffee shops, canteens, kiosks and street vendors.\textsuperscript{218}

The popularity of eating out can partially be attributed to the Singaporean’s increasingly busy lifestyles and rising incomes.\textsuperscript{219} These developments have also increased the popularity of home delivery and takeaway. Another element contributing to the popularity of eating out, home delivery and takeaway is that there are more and more healthy options. The Singaporean government launched a Healthier Dining Programme, which challenged food courts and restaurants to provide healthier meals.\textsuperscript{220} Especially popular among consumers are hawker centres and street kiosks, which offer a wide range of quick, inexpensive street food.

\textit{Challenges and opportunities for EU companies}

The Singaporean market for dairy products can be very interesting for EU companies because incomes are high and consumers are adapting to westernised diets. Furthermore, due to the land and resource scarcity, the demand for imports will remain stable. The market is very open and has very few barriers to entry.

This has led to a very competitive environment and causes challenges for EU companies that wish to export to Singapore. Supermarket and hypermarket operators control the retail market and access to consumers, which gives them a strong bargaining power over suppliers of all food and drinks, including dairy products. As a result, the costs for entry into the market and maintaining a market share can be very high. This can be especially burdensome for smaller producers. Additionally, retailers are more often buying directly from producers, thereby bypassing distributors, especially for specialty products demanded by expatriates.\textsuperscript{221}

\textsuperscript{221} Switzerland Global Enterprise: “Food and Beverage Market Singapore” June 2013 available at: http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf
3.9 Processed Cereals

Processed cereals (HS 1904) includes products produced by roasting cereals, such as breakfast cereals and cereal based snack bars, and prepared cereals in grain form such as oats.

Consumption

A traditional breakfast for the Singaporean Chinese, Indian and Malay communicates consist of Nasi lemak (Malay breakfast staple), Prata, naan or chapati with curry or dahl, Fried vermicelli, noodles or rice (beehoon) and dim sum, however the diverse and westernised populations of Singapore consume a broad variety of breakfast dishes. Constant growth of 4% has been observed in the breakfast cereals market in Singapore in recent years, with the total market value being estimated at EUR 44 million in 2015.

While substantial breakfasts may be traditional in Singapore, the growth of the industry has been attributed to the busy lifestyle that is common in the Singaporean population. As a result, consumption of all convenience foods including breakfast cereals has registered healthy growth on the Singaporean market over the past five years and is projected to continue to do so going forward.

Consumer Profiles

Singapore is a country with a substantial middle class population. It ranks third for highest per capita GDP in the world. As with other developed nations, health and wellness has become increasingly important to the middle class residents of the developed city-state; these concepts registered strong value growth in 2015. This is partly attributed to aggressive government campaigns aimed at encouraging healthy eating habits and reducing the calorie intake of consumers. In 2014 the Singaporean government launched their Healthy Living Master Plan, promoting the consumption of wholegrain products including cereals.

Consumer Trends

Several trends that contribute to the steady growth of the breakfast cereal market can be identified: Multiple sources have attributed the consistent growth to the busy

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lifestyles of the people of Singapore. Breakfast cereals require little preparation time compared to more traditional breakfast options. As Singaporeans’ lifestyles will continue to be hectic, saving time will continue to be important when having breakfast.

An additional factor is that breakfast cereals are considered to be nutritious. In recent years packaged foods containing oats, berries and nuts, were increasingly sought after and began occupying greater shelf space in retail channels. Manufacturers have realised the importance of clear value propositions regarding healthy produce and have moved towards clear labelling of the nutritional values of their products, further boosting sales of health and wellness packaged foods, including breakfast cereals.

As such, convenience and health are the main drivers for the stable demand of breakfast cereals. Breakfast cereals are expected to be increasingly preferred as they are both convenient and healthy.

Opportunities and challenges for EU products

The breakfast cereal industry in Europe is worth approximately EUR 6 billion. In 2015 the EU represented 53.4% of global exports of processed cereals, worth over EUR 2.7 billion. While Singapore has a comparatively small consumer market representing only 0.8% of the global market for processed cereals, steady growth in the market does present opportunities for EU exporters. It has been observed that while growth in consumption has been noted in the Asia region, consumption of snack products has remained stable in the EU and North America in recent years, increasing the attractiveness of Southeast Asia as a potential growth market.

Offer

As a city-state with limited agricultural land, Singapore imports over 90% of its food. Singapore largely does not produce breakfast cereals, it represents less than 0.1% of global exports in this category of foods.

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230 Data compiled from the ITC Trade Map
231 USDA: Foreign Agricultural Service: Global Agriculture Information Service: “Singapore Retail Foods Annual” 10 December 2015 available at:
**Import**

The import of processed cereals in Singapore has registered consistent growth over the past 5 years, rising from EUR 28.5 million in 2011 to EUR 39.8 million in 2015. Imports from the EU as a percentage of total imports has remained steady over the past 5 years, representing a little over 10%. Throughout the last 5 years leading EU exporters have been the UK, Germany and Austria, which represented 6%, 1.4% and 0.9% of Singapore’s total processed grain imports in 2015.\(^{232}\)

In 2015, Singapore imported over 22% of its processed grains from Malaysia, 20% from the USA and 11% from China. Over the 5-year period, imports from Malaysia have grown from 0.08% to their 2015 rate of 22%, while the USA and China’s share of imports have remained fairly consistent.

![Figure 26 Singapore's Imports of Processed Cereals (2011-2015)](image-url)

**Labelling**

All pre-packed food products for sale in Singapore must be labelled according to the general labelling requirements of the Singapore Food Regulations. Nutrition labelling in the form of a nutrition information panel is required when nutrition claims or permitted

\(^{232}\) Data compiled from the ITC Trade Map
\(^{233}\) Data compiled from the ITC Trade Map
health claims are made for pre-packed foods, as illustrated in the example below created by the Singaporean government.

The information declared in the panel must include the energy, protein, fat and carbohydrate contents of the food. The nutrients indicated in the nutrition claim must also be declared. The use of the term "wholegrain" is regulated in Singapore, requiring that the manufacturer of products using the term to meet their definition and to specify the percentage of wholegrain in their products.234

![Nutrition Information](image)

**Example of AVA Interactive Nutrition Label**235

### Mapping of main competitors

Nestlé Singapore Pte Ltd

Nestlé Singapore Pte Ltd has a leading position in the breakfast cereals market,

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with a 30% value share in 2015. The company has a strong presence in children breakfast cereals with a 6% value share for its brands including Koko Krunch, Honey Stars, and Milo all of which have been adapted from local brands to suit local tastes. The established brand equity and high availability in major retail distribution channels maintained the strong position in 2015.  

Quakers

One of the most popular oatmeal products in Singapore is the US manufacturer Quaker.

The Kellogg Company

Kellogg’s, the world’s largest manufacturer of ready-to-eat breakfast cereals also has a dominant position on the Singaporean market, as it does elsewhere. The Kellogg Company has recently shifted its regional headquarters from Sydney to Singapore. 2015 has seen Kellogg’s sales and profits slide as a result of the company’s overreliance on the North American breakfast cereals market. In order to turn around sales, Kellogg has started reformulating its ingredients, growing its savoury snacks portfolio and transforming its Special K brand. It has also devoted more of its attention to becoming more active in emerging markets. 

Specific customs and SPS requirements for import

Singapore is ranked first on the World Bank Ease of Doing Business Report in 2015 and 2016, it also ranked first on ‘Time to Import: Documentary Compliance (hours)’.  

Singapore is essentially a free port for imported confectionery, import requirements are very limited and no import duties are levied on imported breakfast cereals. This said, Singapore has considerably higher import charges being observed than the average for OECD countries, though costs are still considerably lower than the average for the East Asian Region.

Distribution

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Cereals are widely available via the key supermarket chains and local stores in Singapore. Key distribution, including the leading supermarkets in Singapore, air Price, which offers both in store and online purchases of a broad variety of cereal products.

### 3.10 Bread, Pastry, Cakes, Biscuits and other bakery products

#### Consumption

Singapore’s climate is not conducive with wheat grain cultivation and baked goods have not historically figured prominently as part of the national cuisine. Despite this, the country’s global orientation and exposure to European, Asian, and other foreign influences are now culminating in a growing market for imported baked goods.

#### Evolution & Forecast

Consumption of bakery products in Singapore has grown steadily in recent years, reflecting a growing presence of domestic and international baked-goods producers catering to greater demand and new consumption preferences. This growth is reflected by annual per capita consumption of baked goods well above ASEAN peers including Thailand, Malaysia and Indonesia. This disparity is partly reflective of comparable income gaps; Singaporean consumers are among the wealthiest in the world with GDP per capita of over 48,000EUR.

Consumption and expenditure on baked goods in selected markets

![Graph showing consumption and expenditure on baked goods in selected markets](image-url)

*Figure 27 Consumption and Expenditure on Baked Goods in Selected Markets*
Sales of baked goods in Singapore have increased at a compound annual growth rate (CAGR) of around 1.5% during 2010-2015, reflecting in part the maturity of the market. Particularly, consumption habits are in flux as demand for health and wellness offerings increases.

**Consumption Criteria**

With demand for non-traditional baked goods traceable to early contact with Chinese, South Asia and European traders, contemporary consumption growth is primarily attributable to widespread exposure among Singaporean consumers through international travel and commercial exchanges. Singapore is an advanced economy with high levels of income; greater wealth corresponds with a consumer’s likelihood of recognising and having an interest in non-traditional food products. Furthermore, baked goods like European breads and pastries are considered a visible product for cosmopolitan, globally-conscious consumers.

At the same time, uninterrupted income growth since 2010 and the deepening of Singapore’s middle class are reflective of the consolidation of the country’s service-oriented economy, particularly as it revolves around Singapore’s commercially strategic location. Whereas traditional Singaporean meals and snacks tend to be rice-based and prepared with meats and vegetables served hot, consumers – particularly those whose schedules are influenced by working hours - are increasingly seeking practical and convenient alternatives. This is a particular driver for growing consumer interest in breakfast and snack-type baked goods, as well as increased sales of European-style bread products as meal staples (i.e. toasts or used in the preparation of sandwiches). The increasing market for breakfast bakery products is disproportionately driven by demand growth from younger consumers.

Demand outlook is expected to remain stable in-line with very high disposable incomes, consumer interests, and well-developed distribution outlets. Sales of imported baked goods typically perform better in developed, urban markets than in rural areas where lower demand density increases distribution costs and potentially lowers product availability and quality.

As the employment structure of the Singaporean economy is expected to remain stable, while women are increasingly active in the labour force. The share of women in the Singaporean labour force increased at a CAGR of over 1% between 2010 and 2014. This has the effect of creating further time scarcities in terms of home cooking and food preparation as women who traditionally filled such roles are increasingly professionally employed. This in turn drives consumption of convenient food options, particularly baked goods, by both male and female consumer groups.

Nonetheless, growth of baked-goods as a replacement for traditional staples - for example, bread-based dishes - remains to be fully realised. There have been recent campaigns by the Singaporean government to replace traditional staples - particularly those that are based around meats, fried rice or other ingredients high in fat - with

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wheat-based options, particularly breads.\textsuperscript{241} Health and wellness baked goods are finding increasing opportunities in this regard.

Baked goods - particularly packaged bread and pastry products - from domestic and regional producers are typically preferred by middle income consumers in Indonesia whereas imports of European products are more likely to be identified for their higher quality as well as price.

**Consumer Profiles**

The predominance of store-based, artisanal producers has grown in recent years with slight share gains over large, consolidated national producers such as Gardenia Foods and Auric Pacific Group. Gardenia is the current market leader and has considerably expanded its offering of breads and bakery products in recent years. Singaporean consumers are atypically demanding in terms of seeking product innovations, meaning market positions depend to a large extent on the regular introduction of new offerings.\textsuperscript{242}

While locally-established producers such as the example of Nippon Indosari market an increasingly diverse market offering, their permissive conditions are susceptible to foreign imports, particularly from markets recognised for originality and quality. In this regard, European products will initially be most competitive among higher income consumers likely to buy premium baked goods. The challenge in meeting this market will be to deliver an offering that is compelling and retains consumer interest.

Singapore’s relatively young demographic structure, with 43% of the population between 15 and 44 years of age, further predisposes towards continued growth in baked goods consumption. Younger consumers are not only to display more cosmopolitan culinary preferences, but are further more likely to seek baked goods for their convenience and conformity with ‘urban lifestyle’ image perceptions.\textsuperscript{243}

**Consumer Trends**

Reflecting the above, consumption demand for European baked goods will likely remain higher for categories of products with longer shelf lives. Industry observers note further that whereas European baked goods are well-positioned to capture the high-end of the market, Japanese and Asian breads and pastries are the preferred choice of upper-middle income consumers whereas local sweet and white breads are primarily consumed by the lower middle-income segment.

**Cultural Sensitivities**

\textsuperscript{241}Health Promotion Board: “Who are we?” 3 April 2012 available at http://www.hpb.gov.sg/HQPPortal/faces/AboutUs/HealthAmbassadorNetwork?_afrLoop=2931171888067373&afrWindowMode=0&afrWindowId=null#%40%40%3F_afrWindowId%3Dnull%26_afrLoop%3D2931171888067373%26_afrWindowMode%3D0%26_adf.ctrl-state%3D1d75o0g019_4.


Singaporean consumers are generally receptive to non-traditional foods and products. Religious affiliations in Singapore do have some influence over dietary habits. Approximately one-third of Singaporeans are Buddhist, which some interpret to proscribe the consumption of meats. Remaining religions with a sizeable presence in Singapore include Christianity (approximately 20%) and Islam (approximately 15%).

While baked good products are typically compliant with Islamic food practices (halal), some producers have catered to consumers in Islamic markets by visibly displaying halal certifications on product packaging.

Broadly, Singaporean consumers are interested in international and European products - this extends to include baked goods. As a whole, Singaporean consumers are sensitive to food quality and nutrition. Other things equal, this may have a beneficial effect on European products which are more likely to be perceived as reputable and well-produced, and which will tend to be packaged baked goods - a category in which consumers have higher confidence than unpackaged.

**Challenges for EU Products**

The prevailing challenge for EU producers of baked goods seeking entry into the Singaporean market is the distance involved and incumbency of local and competing regional producers - particularly bakeries in Malaysia and Japan, as well as the United States.

Establishing consumer bases in Singapore presents challenges in that the market for freshly baked goods is largely dominated by regional and domestic artisanal producers able to produce more cheaply and on a much more local, direct level than consolidated competitors. Best performing baked goods originating from Europe are likely to target niche premium or higher value consumption segments. Leveraging recognition of traditional quality of these European products will be imperative for the success of these products.

**Offer**

The market for baked goods in Singapore has been growing in recent years and continues to show promise ahead; this growth has been derived from both increasing domestic production as well as import levels.

**Domestic Offer**

The domestic market for baked goods in Singapore has been led by bread sales, including both packaged and unpackaged products. Sales of packaged breads grew consistently between 2010 and 2015, from a base value of around 25EUR billion to approximately 30EUR billion. Sales growth of packaged breads has marginally exceeded
that of unpackaged products, and the overall market for packaged bread products was 1.8 times larger in 2015.

Sales growth of baked goods in Singapore is expected to accelerate during the next several years, in tandem with a positive economic outlook for the foreseeable future. The size of the domestic markets for bread, cakes, and pastries are estimated to reach 170EUR million, 57.6EUR million and 46.3EUR million respectively by 2020. Low input commodity prices for baked goods plus continued professionalization and expansion of the service sector are likely to have further positive effect on total sales values for baked goods.

![Figure 28 Sales Trends of Selected Baked Goods in Singapore](source: Euromonitor International)

**Import**

Singapore’s imported valued of baked goods increased by one-third between 2010 and 2015, with a final value of more than 250EUR million during the final year of the reference period. The single largest supplier of baked good products to the Indonesian market has consistently been Malaysia. The combined export position of the EU-28 for baked goods to Singapore has been roughly on par with that of the United States, but grew at a larger rate during the reference in terms of both volume and value. Among leading exporters of baked goods to Singapore, EU products have consistently recorded superior value-for-volume ratios, indicative of strong positioning in premium consumption markets.
Singapore’s imports of Bread, Pastry, Cakes, Biscuits and other Bakers’ Wares

Of all of the EU countries that export to Singapore, the UK is a disproportionate leader in terms of total volume and value. There is some variation in terms of the ratio between each country’s exports by volume and value, or the de facto price per tonne. For example, French and Dutch exports represented the lowest prices paid per tonne at 4,788EUR and 4,388EUR, respectively; Italian exports of baked goods averaged the highest price paid per tonne, at 6,951EUR.
Singapore’s domestic bakery industries are highly dependent on imported ingredients, such as wheat which cannot be grown natively. This means that as the domestic industry expands and suppliers consolidate, the cohort will remain more vulnerable to external supply shifts than more mature producers able to draw upon domestic supplies. Imports of baked goods are expected to remain relatively stable into the coming years, but the supply market will become increasingly competitive and require sustained demand growth to match.

**Export**

Singapore is a net importer of baked goods, with a 2015 trade balance of -162EUR million. Given limited opportunities for scale of domestic production, Singapore has performed better as a ‘concept exporter’ particularly in light of strong growth by Singaporean brands such as BreadTalk in the region. Singapore is furthermore a significant logistics hub in the region and transhipment point for re-exports of bakery products.

**Competitors**

The Singaporean market for baked goods is dominated by the collective largesse of artisanal producers and boutiques, who comprise more than half of total supply. These
suppliers typically offer freshly baked, innovative and higher-quality products to convenience-seeking consumers with lower levels of price sensitivity.
The largest consolidated supplier in the Indonesian market is Gardenia Foods, a local firm which first began production in the 1960s. Gardenia offers a large and continuously updated selection of traditional packaged bread products, primarily meeting demand from upper-middle class consumers.

All consolidated baked goods producers in the Singaporean market have been losing shares to artisanal producers since 2010. This in turn reflects greater demand growth for unpackaged baked products relative to packaged offerings. Singaporean consumers are increasingly seeking freshly prepared baked goods consumed ‘on-the-go’ or otherwise socially, such as in shopping malls.

Internationally, EU producers face competition from Singapore’s regional trading partners - particularly Japan and Australia - who further cater to higher income group consumers. These products are generally preferred for their higher quality over local artisanal baked goods - which are increasingly being eschewed for concerns over...
nutrition and quality of ingredients - though they are not likely to reflect any traditional quality or reputation as often accorded to European baked goods.

However, while international producers of baked goods outperformed EU suppliers in Indonesia’s total imports, there remain no significant foreign retail suppliers by market share. This differs from on-trade supply, where there is a growing presence of international food service establishments, but these are mostly on a franchise basis and draw from production in situ.

**Customs & SPS Import Requirements**

The EU benefits from reduced or duty-free customs access to Singapore under the EU-Singapore FTA. Food imports require specific labelling practices in order to secure market entry.

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All imported or locally manufactured pre-packed food for sale in Singapore must be labelled with basic information such as name of food, ingredients, net content and source. This also applies to pre-packed foods that are intended for human consumption and offered as a prize, reward or sample for the purpose of advertising.

The following basic information is required to be declared in **English** on the labels of pre-packed food. Items 1 to 4 should be in printed letters not less than **1.5mm** in height.

**1. Name or description of food**

This refers to a common name or a description which is sufficient to indicate the true nature of the food product.

Some examples of names or descriptions include:

1. "Bread"
2. "Minced or chopped meat"
3. "Olive oil"
4. "Concentrated Fruit Juice"

Ensure that the terms used for the common names or descriptions comply with the statutory requirements by referring to “Part IV – Standards and Particular Labelling Requirements for Food” of the **Food Regulations**.

**2. Statement of ingredients**

This refers to a complete list of ingredients and additives used in the food product, listed in descending order of their weight in the product (i.e. the ingredient that weighs the most must be listed first and the ingredient which weighs the least must be listed last).

See section "Ingredient Listing" below for more information on the steps to
3. Declaration of foods and ingredients known to cause hypersensitivity
All foods and ingredients known to cause hypersensitivity must be declared on the food label when present as an ingredient or additive, or as a component of a compound ingredient. See section on "Ingredient Listing" below for the list of foods and ingredients known to cause hypersensitivity and the steps to declare them.

4. Declaration of net content in package
This refers to the net quantity of the food present in the package, which is derived using the Average Quantity System (AQS) or the Minimum Quantity System (MQS). Net quantity must be expressed in terms of:
(1) Volumetric measure for liquid foods (e.g. milliliters, liters)
(2) Net weight for solid foods (e.g. grams, kilograms)
(3) Either weight or volumetric measure for semi-solid or viscous foods (e.g. tomato paste, yoghurt, etc.)

*Liquid medium is defined as water, aqueous solutions of sugar and salt, fruit and vegetable juices in canned fruits and vegetables only, or vinegar, either singly or in combination.
In the case of weight measure, suitable words such as “net” should be used to describe the manner of measure.
As of 15 April 2011, pre-packed food products are required to be labelled with the “net” quantity of the food in the wrapper or container, instead of the “minimum” quantity. However, industry members may continue using MQS without being penalised.
For more information on AQS, download the following slides (available in English and Chinese):
(1) Average Quantity System (AQS) (ENG)
(2) Average Quantity System (AQS) (CHI)

You can also download the international standards relating to the AQS:
(1) OIML R 79 Labeling requirements for prepackaged products
(2) OIML R 87 Quantity of product in prepackages
(3) Official Chinese translation of OIML R 79 and OIML R 87 relating to the Average Quantity System (AQS)*

*Efforts have been made to provide an accurate translation of R 79 and R 87 documents. However, as the official text is contained in the English versions, any discrepancies or differences created in the translation are not binding and have no legal effect for compliance or enforcement purposes. Please refer to the official English versions of the documents should you have any questions related to content accuracy.
5. **Name and address of the local manufacturer or importer**
For food products of local origin, labels must include the name and address of the local manufacturer, packer or vendor. For imported food products, the label must indicate the name and address of the local importer, distributor or agent. Telegraphic, facsimile and post office addresses alone are not acceptable.

6. **Country of origin of food**
Labels on imported food products must indicate the name of the country of origin of the food. The name of a city, town or province alone is not acceptable. Locally manufactured products are encouraged to provide this information on the label on a voluntary basis.

**Exemptions**
Labelling requirements do not apply under these conditions:
1. Food weighed, counted or measured in the presence of the purchaser.
2. Food that is loosely packed at the retailer’s premises.
3. Intoxicating liquors are not required to carry a statement of ingredients on their labels.

**Source: Agri-Food & Veterinary Authority of Singapore**

There are no active complaints by the EU against Singapore regarding SPS market access barriers.

**Distribution**

Singapore remains a compact, well-consolidated market with excellent distribution infrastructure. The country is a regional logistics hub for both air and sea cargo and has well-developed surface transportation.

**Distribution Structure & Market Share**

The market for baked goods in Singapore can be stratified into several distinct segments. First, there is the artisanal base of producers catering to localised markets and convenience-oriented consumers through specialised production. These artisanal bakers typically sell directly.
Distribution shares in the Singaporean market are expected to remain largely stable, with small variation derived from consumers’ increasing preference for on-trade consumption. This, in turn, has driven greater product innovation from off-trade suppliers; in particular, there is increasing emphasis on health and wellness offerings to attract and retain Singaporean consumers.

On-trade, a number of notable baked goods suppliers have emerged in Singapore in recent years, including many specialising exclusively in bread, pastries, cakes, and other bakery products. Among these, BreadTalk is recognised as an industry leader through its well-based understanding of the domestic market and consumer preferences in Singapore. BreadTalk’s offering caters to both sweet and savoury snack demands delivered in a rapid service environment; the franchise has since been followed by the entry of new competitors including Tous Les Jours (South Korea) and Paul (France).244

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244 The Straits Times: "European bread such as sourdough are on a roll in Singapore" 19 April 2015 available at www.straitstimes.com/lifestyle/food/european-bread-such-as-sourdough-are-on-a-roll-in-singapore.
**Challenges for EU Producers**

Distribution remains one of the foremost challenges for European baked goods suppliers to Indonesia, as even minor obstacles faced by local and regional producers are only likely to be amplified for those originating from the EU. European entrants should develop well-defined distribution plans and identify strong import-partners to ensure the feasibility of their product in the Singaporean market, including compliance with SPS requirements, expedient customs clearance, and fast delivery to the end retailer or consumer.

By some measures, ease of doing business in Singapore is the best in the world. Singapore ranked ahead of the regional average and comparators in terms of ease and cost to import.

![Figure 33 Comparing Import Costs in Indonesia with East Asia & the Pacific Region](image)

*Source: World Bank*

Ease of import to the Singaporean market is further facilitated by excellent transportation infrastructure once a product is admitted. This particularly applies to ensuring food quality and security preservation while in transit; for example, cold and dry logistics, warehousing and delivery options. Average delivery times from port-of-entry to end consumer are often under 3 hours.
3.11 Chocolate and derived products and Confectionery

Consumption

Singapore has a well-developed market for confectionery products. According to Flanders Investment and Trade market study, the Singaporean confectionery market grew by 2.2% in 2014 to reach a value of $483.4 billion and it is forecasted to have a value of $536.4 million in 2019245. The largest segment of the confectionery market in Singapore is chocolate which accounts for 59.9% of the market’s total value.

Consumer Profile: Health Concerns

According to the Switzerland Global Enterprise market study246 in a reflection of the health and wellness trend, Singaporean consumers are gradually moving towards reduced sugar chocolate confectionery as well as dark chocolate because of its antioxidant properties. In addition according to the study, there is also a trend towards premium high-quality chocolates as consumers develop a more sophisticated taste for chocolate and the know-how to appreciate premium chocolate products such as those with high cocoa content. There is also likely to be raising interest in healthier chocolates among consumers, who are becoming more conscious about their diet and nutritional intake. As such, there is expected to be raising sales for high cocoa content products which contain more antioxidants.

The Study also shows that although consumers are increasingly purchasing reduced sugar chocolates, the organic chocolate trend has not taken off in Singapore, and organic chocolate products are expected to have little impact, which means that the European organic Chocolate producers might not be able to achieve in Singapore the success that they enjoy at home. The product offer remains small, with limited choice available only at selected supermarkets and health food shops.

Consumer Trends: How to Market Chocolate and Confectionery

Standard boxed assortments of chocolate seemed to be the fastest growing category in 2012 according to the Switzerland Global Enterprise market study, as the trend of consumers indulging in premium chocolate has led to the growth of standard boxed assortments. In addition, the trend of gift giving during festive seasons such as Mother’s Day and Christmas also drove the growth of the standard boxed assortments sold at hypermarkets and supermarkets.

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246 Switzerland Global Enterprise: "Food and Beverage Market in Singapore" June 2013 available at: http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0_2.pdf
Chocolate confectionery is easily available via various distribution channels including hypermarkets, supermarkets and small grocery retailers. There is likely to be more boutique chocolate outlets, within the confectionery specialists’ category, opening in Singapore as consuming gourmet chocolates is expected to become part of the lifestyle of a growing number of consumers. This is good news for the European small gourmet chocolate producers, who could open branches of their boutiques in Singapore.

The Euromonitor has noticed an interesting trend in chocolate packaging style that the European chocolate producers should be aware of when marketing their products in Singapore. In 2015, miniaturized versions continued to be a key trend in chocolate and derived products sector. Consumers prefer miniaturized versions for a number of reasons. For example, they are easy to snack on, convenient to carry around, good for sharing as they usually come in large packs and, most importantly, less sinful than a normal sized portion. Manufacturers released more such products in 2015, with Nestlé Singapore taking the lead by launching Kit Kat Chunky Mini during the first quarter of 2015.247

Challenges for the European Products

Chocolate and confectionery from Europe is well perceived in Singapore and local consumers tend to prefer European chocolate to chocolate and confectionery made in Singapore. “Chocolate has traditionally been seen as a European specialty, so selling chocolates produced in Singapore is naturally challenging from a branding perspective,” says the Barry Callebaut, a Swiss company producing chocolate in Singapore, chief operating officer, Ms. Connie Kwan.248 This means that European companies may experience some difficulties with selling their products if they decide moving their production to Singapore.

According to the Flanders Trade and Investment market study, a major challenge for gourmet chocolates such as pralines and truffles are maintaining freshness and quality.249 Handmade pralines and truffles is considered as sensitive products when it comes to right temperature storage and shelf life. Gourmet chocolates tend to have a shorter shelf life as compared to ordinary chocolate confectionery. Singapore is a relatively small market with affluent consumers who seeks for novelty and quality products. Although international brands are well-known by locals, the chocolate confectionery market has to constantly offer a wide selection and novelty products that appeal to the end-consumers.

Offer

Domestic Market

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Singapore is no longer an emerging market for chocolate confectionery because the chocolate market is too saturated and well-developed by international players according to Flanders Trade and Investment market study. Singapore chocolate market can be divided into a few segments which covers low end Asian produced dark compound chocolates, chocolate bars and novelties, imported gourmet chocolate and gift chocolates. Gourmet chocolates represent a considerable market share in Singapore because consumers are more willing to spend on premium quality confectionery products as compared to the past. This upward trend has led to the resurgence of chocolate boutique or café in Singapore.

Singaporean confectionery market grew by 2.2% in 2014 to reach a value of $483.4 billion and it is forecasted to have a value of $536.4 million in 2019. The market has been growing at a similar pace for the past five years.

**Import of Chocolates and Confectionery Products**

Singapore is a major confectionery importer as its consumers trust the foreign brands more than the local brands. Singapore Chocolate imports from the EU have steadily increased over the past five years.

![Bar chart showing imports of chocolate from the EU (2011-2015)](chart)

*Figure 34 Singaporean Imports of Chocolate from the EU (2011-2015)*

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251 Ibid

In 2014, Singapore imported Chocolates and Confectionery for the total value of $360 643 689.\(^{253}\)

Singapore is essentially a free port for imported confectionery and snacks. Thus, no import duties are levied on imported confectionery and snacks. Chocolate with or without alcohol content are not dutiable by Singapore Customs. A 7% Goods and Services Tax will be imposed for all import of chocolate products into Singapore.

A chocolate producer who wishes to export its products into Singapore is required to appoint a local importer. The exporter is required to submit a manufacturing license issued by the relevant authority in the country. The manufacturing license is submitted to the appointed importer for the application of import license. The local importer will have to apply for the import license through the Agri-food & Veterinary Authority (AVA) of Singapore.

**Export of Chocolates and Confectionery Products**

Singapore is also one of the biggest chocolate exporters in the world in 2015 Singapore exported chocolate for the value $446.9 million, making the country the 14\(^{th}\) biggest chocolate exporter\(^{254}\).

One of the biggest local chocolate producers in Singapore is the Aalst Chocolate that produces 30,000 tons of chocolate yearly.\(^{255}\) Aalst exports chocolates to at least 40 different markets around the world and it is well-known in Asia.\(^{256}\)

Even though Singapore is one of the major chocolate exporters, its chocolate export to the European Union has started to only take off during the last few years. In 2015, Singaporean exports to the EU amounted to EUR 1 million. There were no recorded exports over the period 2011-2014.

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\(^{255}\) Picture Source http://www.adwright.com/case-studies/aalst-chocolate

\(^{256}\) Ie Go Global Singapore: “Aalst Chocolate: Winning the same way” 2016 available at: http://www.iesingapore.gov.sg/SgGoesGlobal/AalstChocolate
Main Competitors on the Market

Ferrero SpA, Mars, Ricola, Nestle and Fisherman’s Friend are the leading brands in the Confectionery market in Singapore. Major players in the market for chocolate and confectionery also include Cadbury, Hershey and Lindt.

Ferrero SpA -

Ferrero SpA was a market leader for Chocolates and confectionery in Singapore, with a 23% retail value share due to its strong portfolio of brands. It recently opened new boutiques in Singapore.

Ferrero Packaging Style

Mars

Mars Foods maintained its leading position amongst sugar confectionery in 2015 with an 11% retail value share thanks to the strength of its Eclipse mints brand.259

Mars Chocolate Confectionery Packaging Style

Mars Eclipse Packaging style

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1. Ricola

Nestle

Fisherman's Friends
Specific Customs and SPS Requirements

Singapore is essentially a free port for imported confectionery and snacks. Thus, no import duties are levied on imported confectionery and snacks. According to Flanders Investment and Trade Confectionery Market Study Chocolate with or without alcohol content are not dutiable by Singapore Customs. A 7% Goods and Services Tax will be imposed for all import of chocolate products into Singapore.\(^\text{260}\)

According to the study a chocolate producer who wishes to export its products into Singapore is required to appoint a local importer. The exporter is required to submit a manufacturing license issued by the relevant authority in the country. The manufacturing license is submitted to the appointed importer for the application of import license. The local importer will have to apply for the import license through the Agri-food & Veterinary Authority (AVA) of Singapore.\(^\text{261}\)

The use of stevia as an ingredient in chocolate confectionery in Singapore is currently not allowed by AVA Singapore unless the product is labelled as a health product.\(^\text{262}\)

Distribution

Confectionery products such as chocolates, candies and cakes are distributed through local confectionery importers to foodservice industry (cafes and hotels) and retail distribution channels such as supermarkets, hypermarkets, convenience stores and departmental stores. Supermarkets continue to dominate the sales of confectionery products in Singapore.\(^\text{263}\) All importers of chocolate and confectionery must appoint a local importer.

\(^{261}\) Ibid
\(^{262}\) Ibid
\(^{263}\) Ibid
During seasonal period, leading supermarket chain such as Fairprice and Cold Storage also imports directly from chocolate companies for sales in their retail chains.\textsuperscript{264}

Some of the biggest local importers include:

**Associate & United Distributors Pte Ltd**

128 Joo Seng Road #07-00 Singapore 368356  Tel: (65) 6289 4204 / (65) 6289 4324  Fax: (65) 6289 6741  Website: www.aud.com.sg

**Euraco Fine Food Pte Ltd**

Block 219 Henderson Road #01-03 Henderson Industrial Park Singapore 159556  Tel: (65) 6276 5433  Fax: (65) 6276 2978  Website: www.euraco.com.sg

**DKSH Singapore Pte Ltd**

34 Boon Leat Terrace Singapore 119860  Tel: (65) 6471 1466  Fax: (65) 6479 9104  Website: www.dksh.com

**Focus Network Agencies Pte Ltd**

87 Defu Lane 10 #02-01 MEC Techno Centre Singapore 539219  Tel: (65) 6858 1800  Fax: (65) 6858 1808  Website: www.thecocoatrees.com

Apart from supermarket chains, specialty stores and chocolate boutiques are very popular in Singapore. There are a few notable chocolate companies from Belgium such as Godiva and Guylian that started their boutiques in Singapore. The mainstream brand such as Hershey Chocolates Company have move up the value chain by creating its own flagship store in Singapore as well. The largest importer/distributor and retailer of chocolate confectionery products in Singapore is The Cocoa Trees, owned by Focus Network Agencies.\textsuperscript{265}

Major departmental stores in Singapore typically have a food hall or gourmet segment where chocolates & confectionery, condiments, seasonal, wine and other gourmet food products are available for shoppers.

Major supermarket Chains in Singapore include:

**Cold Storage Supermarket**

21 Tampines North Drive 2 #03-01 Singapore 528765  Tel: (65) 6891 8000  Fax: (65) 6746 7861  Website: www.coldstorage.com.sg

**Giant Hypermarket**

21 Tampines North Drive 2 #03-21 Singapore 528765  Tel: (65) 6891 8000  Fax: (65) 6565 5431  Website: www.gianthypermarket.com.sg

**NTUC Fairprice**

1 Joo Koon Circle #13-01 FairPrice Hub Singapore 629117  Tel: (65) 6592 1300  Fax: (65) 6452 2241  Website: www.fairprice.com.sg

\textsuperscript{264} Ibid

Some of the most well-known specialty stores selling chocolate and confectionery include:

**The Cocoa Trees**

The Cocoa Trees is owned by The Focus Network Agencies (www.thecocoatrees.com). FNA also manages Cocoa & Co. retail outlets, M&M Concept Stores, Choc Spot and Godiva Specialty Stores in Singapore Changi Airport.

Focus Network Agencies (S) Pte Ltd 87 Defu Lane 10 #02-01 MEC Technocentre Singapore 539219 Tel: (65) 6858 1800 Fax: (65) 6858 1808 Website: www.thecocoatrees.com

**Candy Empire Pte Ltd Candy Empire**

is Singapore’s largest chocolate and candy gourmet shop with a wide range of products from Australia, Europe and United States owned by K.A. Zareena.

K.A. Zareena & Co. 35 Tannery Road #02-01 Tannery Block Ruby Industrial Complex Singapore 347740 Tel: (65) 6749 3951 Fax: (65) 6749 4312 Website: www.candyempire.com.sg

Some of the well-known gourmet chocolate stores include:

Dean & Deluca (www.deandeluca.com)

Zircon-Swis Fine Foods (www.zirconswis.com.sg)

Oh Deli (www.ohdeli.com.sg)

The Cheese Shop (www.cheeseshop.sg)

The Providore Shop (www.theprovidore.com)

Redmart (https://redmart.com)

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**Challenges for the European Products**

According to the Flanders Trade and Investment market study report, the retail trade is rather expensive for chocolate products in highly sales performance oriented supermarkets and hypermarkets.\(^{266}\) Listing fees for retail trade are dependent on the stock keep unit (SKU) of a particular brand. This does not include brand management and marketing support. Hence, most importers in Singapore source for established international brands or chocolate companies that would invest on brand building especially in the retail trade. Apart from expensive listing fees, major confectioners or chocolatiers also partner with marketing services agency such as DKSH to market their products and build their brand in the region. However, an agency such as DKSH works exclusively with major and established brands instead of small chocolatier or confectioner.

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3.12 Honey

Consumption

Honey is getting more popular amongst Singaporean consumers as the consumers are becoming more health-conscious and are starting to realize the benefits of honey. In Singapore, honey is used mostly in marinating barbeque meats and mixing with water to make throat-soothing or thirst quenching icy honey drink, which is a popular drink in Singaporean hot climate that according to the locals is supposed to reduce "heat in the body". Furthermore, Singaporeans also believe that honey has considerable health benefits, such as anti-cancer and immunity-boosting properties, which further boosts the consumption of honey in the country.

Consumer Profile

According to Euromonitor, even with increasing income, Singaporean consumers have maintained their historical caution about accumulating debt and consistently seek out low prices for both food and non-food items. This means that Singaporean consumer would often choose the cheapest brand of honey on the market, which oftentimes mainly comes from China – Singapore’s biggest honey importing source.

While the organic market may be still relatively small in Singapore, the natural healthy foods market is significantly bigger, with a retail value of under SGD200 million. Honey is considered as one of the natural and healthy foods and more and more Singaporean consumers are starting to replace sugar with honey as a sweetener in their daily food consumption. This means that as the Singaporean consumers, following the global trend, are becoming more health-conscious, the market for honey has a growth potential.

Singaporean consumers often buy Manuka honey (from the Manuka bush) that is mainly imported from the New Zealand, because they believe that Manuka honey has great health benefits because of its anti-bacterial and anti-inflammatory properties. Singapore is consuming currently 7% of the New Zealand’s honey exports. Manuka honey is the preferred honey on the Singaporean market as it is proven to boost people’s health. If European honey producers (sea buckthorn honey for example)

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273 Ibid
manage to promote their products as health-boosting, they could potentially find success on Singaporean honey market.

Singaporeans are keen buyers of foreign products, but the Singaporean consumers are not only brand conscious, but are also very loyal and cautious towards exploring alternatives. This means that for the small honey producing companies, it might be difficult to get on the highly competitive market.

**Consumer Trends**

According to the study of the Singaporean-German Chamber of Commerce and Industry, unprocessed and functional foods are becoming increasingly popular in Singapore as people pay more attention to their diet and are more health conscious. There is hence a trend towards fresh cooking which is likely to be more beneficial for health reasons. Health-consciousness is making Singaporeans gradually prefer natural sweeteners like honey over artificial and sugar based sweeteners.

As Singaporean consumers become more health-conscious, they are likely to buy more honey with proven health-boosting and immunity system strengthening characteristics like the Manuka honey.

Furthermore, consumers being more aware of climate change and the problems it induces are also likely to be more eco-friendly in their consumption patterns such that F&B providers who are more socially and ethically responsible are more popular and accepted by these savvy buyers. This means that European producers who are known for ethical honey production may find increasing opportunities in Singapore for their products.

**Challenges for European Producers**

As mentioned above, Singaporean consumers are brand-conscious and brand loyal. They already have developed liking towards quality honey products like Manuka honey from the New Zealand and therefore it might be relatively difficult for the small European honey producers to enter to Singaporean market, as on a well-saturated market one would need to rely heavily on advertisement, which could be too costly for the small producers.

Another challenge has to do with the fact that Singaporean consumers still prefer to choose the cheapest products available when they are contemplating between similar products. The Singaporean consumers who are not so health-conscious would thus just...
choose the cheaper product on the market. European products would then have to compete with cheaper Chinese honey products.

**Offer**

**Domestic Offer**

Singaporean domestic honey offer is quite negligible because Singapore is heavily dependent on food imports, due to its virtual absence of agriculture and livestock farming. More than 90% of the country’s food supplies are from abroad, especially from the Asian region. Singapore is currently not in the business of large-scale bee-farming. Most of Singapore’s honey also comes from abroad and mainly from China and other Asian neighbors but also from the New Zealand, as mentioned above.

Domestic offer is expected to pick up slightly in the future, as there are signs that urban bee-keeping is becoming trendier in Singapore. For example the Pollen Nation, an association of bee-conservationist in Singapore, is able to currently produce about 20-25 kg of honey in a year and it is hoping to market this honey as local Singaporean honey. More honey producers for commercial purposes are also expected to emerge, once urban bee-keeping really picks up.

**Import**

Honey imports have increased significantly during the past five years in Singapore, as Singaporean people become more conscious about the health benefits of honey. The chart below summarizes Singaporean honey imports.

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Most of the honey imports come from the Asian neighbors (China and Malaysia) but also from the New Zealand that is mainly exporting Manuka honey to Singapore. Australia is also one of the main honey exporters to Singapore, accounting for about 16% of the Singaporean honey imports.  

European Union exports of honey to Singapore have also been quite negligible during the past five years and the exports have not shown growing trends, remaining quite stable. A chart below shows European Union honey and eggs export to Singapore.

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**Export**

Singapore’s honey export is very low, mainly because as a small city-island nation, Singapore does basically not produce honey itself. It mainly re-exports honey that it imports from some African nations like Rwanda.\(^{283}\) A chart below gives an overview of Singapore’s honey exports over the past five years.\(^{284}\)

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According to the Agri-food Trade Statistics Factsheet, prepared by the Directorate-General for Agriculture and Rural Development of the European Commission, Singapore does currently not export any honey to the European Union.\textsuperscript{285}

**Labelling Options**

Honey could follow specific health-certification or a certification that resembles to a GI. For example the honey from New-Zealand can have UMF (Unique Manuka Factor) certification.\textsuperscript{286} UMF certification means that the honey is collected from the region, where the Manuka trees grow and would thus contain the famous Manuka pollen that is thought to exhibit antibacterial activity. The certification is given by the New-Zealand Unique Manuka Factor Honey Association (UMFHA) and it is meant to help the consumers to find trusted Manuka products on the market.

**Mapping the Competitors**

Manuka Honey

One of the most popular type of honey in Singapore is Manuka honey from New Zealand, which can be quite


expensive, ranging from $10 for a 500ml jar to as much as $100.\textsuperscript{287} Manuka honey is preferred by the Singaporean consumers because of its antibacterial characteristics. There are several New Zealand brands that are competing for the Manuka honey market including Evergreen, Comvita, Watson & Son, Manuka Health, Pure Honey New Zealand and API Health, Honey Valley, etc.\textsuperscript{288}

**Honey World**

One of the biggest honey sellers in Singapore is Honeyworld, which has over 20 stores in Singapore. Honeyworld aims at offering high-quality natural honey from ethical honey producers. It imports honey from New Zealand (the well-known Manuka honey) and Australia, focusing on bringing in healthy products from famous and leading brands such as Future Bake Bars, Australian By Nature, New Zealand Manuka Melts, Nature’s Kiwi, Uniflora, Stakich and Honey Valley.\textsuperscript{289}

**Specific Customs and SPS Requirements for Import**

Importers are required to register as a "declaring agent" in order to make an application for a permit, certificate or any form of approval; they are not required to appoint a declaring agent to transact on their behalf.\textsuperscript{290}

Singapore has a Goods and Services Tax in place, which is levied on domestically produced or imported goods and services at the standard rate of 7%.\textsuperscript{291} All honey imports will be subjected to the same tax and importers need to pay the 7%. There are no other extra import taxes concerning honey imports.

**Distribution**

The strong presence of foreign retailers in Singapore reflects the city state’s open and favorable foreign investment climate. But the market remains fragmented, and the growth of supermarkets and hypermarkets, although fairly strong, has been impeded by the limited amount of land available.\textsuperscript{292}

\textsuperscript{291}Ibid
Large department stores and malls in Singapore include a number of Japanese chains, such as Takashimaya and Isetan, as well as the Beijing Hualian Group of China and the Robinsons department store group, owned by the Dubai headquartered Al-Futtaim Group. Other department stores include those owned by Tangs of Singapore. These stores have an advantage as a result of their proximity to mass rapid transit (MRT) stations and residential estates. All these big supermarkets sell some kind of honey products. As Singaporean consumers prefer visiting larger supermarkets or hypermarkets, these can be good distribution channels for European producers.

Although traditional wet markets continue to attract significant shares of food retail spending, an increasing number of households are turning to Western-style supermarkets. This retail space is dominated by two retail groups, Hong Kong-headquartered Dairy Farm and locally based NTUC FairPrice, which operate a number of supermarket chains. Other, smaller players include Isetan, Meidi-Ya of Japan and three local players, the Mustafa Centre, Prime Supermarket and Sheng Siong.

Local distributors are usually used when exporters bring food products into Singapore. Exporters are also advised to work with only one distributor to avoid a result in price wars and brand dilution, and to appoint a distributor with an established network so as to reach the exporter’s target segment. Distributors manage importing, storage and distribution to buyers, and most distributors are also responsible for marketing and promotion. It is also increasingly common to sell directly through to retailers. European producers are recommended to spend some time in finding a good distributor or retailer for their products.

A recent Weber Shandwick study showed that Singaporeans are putting in an increasing number of working hours when they get home, on top of extended work hours, due to the convenience and availability of the internet. Logging more work hours means sacrificing time elsewhere, and frequently that can mean more meals on the go. Their consumer survey confirmed this trend, with 61% of respondents saying they ate out more frequently in the past year as compared to the two years before. The number of times people eat out in a week is also high, with 67% eating out at least once a week, and nearly a third (30%) saying they eat out three or more times a week. This means that consumers are moving towards consuming more food at the restaurants than at home, which also means that the restaurants will require more honey. European producers should thus also think about directly supporting some restaurants with honey, as the restaurant clients may also like to see the restaurants replacing some sugar-based sweeteners with honey.

The most well-known Singaporean restaurant that is serving honey products, is a restaurant called Wild Honey that serves brunches, lunches and dinners. The restaurant serves several

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295 Switzerland Global Enterprise: "Food and Beverages Market in Singapore” June 2013 available at: http://www.s-ge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0.pdf
honey products including honey cakes and also raw honey.  

**E-Commerce**

E-commerce is becoming increasingly popular in Singapore. 75% of Singaporean consumers are internet users and their quick lifestyle and working for long hours makes them prefer e-commerce sites for doing shopping. With increasing Internet penetration, e-commerce firms in Singapore say more consumers are going online, as they get more comfortable with Internet and mobile payment methods. A lot of natural products like honey are sold through e-commerce platforms or online shops in Singapore. One of the popular online platforms selling natural products including honey is the Nature’s Market. European producers could thus also distribute their product via e-commerce sites or specific online shops, concentrating on natural products.

**Challenges for the European Products**

According to the Switzerland Global Enterprise Market Study, a key challenge in Singapore is that it is a highly competitive market. The major supermarket and hypermarket operators control the whole retail market by actively segmenting it around different store concepts (and store brands/banners) and merchandising strategies that target the low income group through to the high income groups and expatriates. As a result, retailers control access to shoppers and have very strong bargaining power over suppliers of all forms of food and drinks including honey. Marketing and distribution costs are extremely high for new product launches and also high for the on-going maintenance of market shares and positions. This situation is further compounded by the fact that retailers are very profit margin driven because of their very high overheads, especially store rentals. This might not be a big issue for the European big honey producers. However, for the small honey producing companies it could be very difficult to actually afford to get their products on the shelves in Singapore.

Suppliers in Singapore have very little power to deal with the demands of retailers when it comes to accessing retail space for their products and according to the Switzerland Global Enterprise Market Study the distributors and importers and retailers now expect their suppliers to be fully committed to develop their markets in Singapore, in terms of willingness to: deal with local demands for promotional campaigns; develop products and packages that fit local demand requirements; have a product and brand that is unique enough to break into the market; be flexible in terms of returns and profit goals;

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297 Chope: “Wild Honey”2016 available at: [http://www.chope.co/singaporerestaurants/pages/wildhoney_restaurant?source=chope&sub_source=adw_gg&clid=CPyGq1P4rs8CFYZivAod9wsNRw&qclid=aw_ds](http://www.chope.co/singaporerestaurants/pages/wildhoney_restaurant?source=chope&sub_source=adw_gg&clid=CPyGq1P4rs8CFYZivAod9wsNRw&qclid=aw_ds)


300 Switzerland Global Enterprise: "Food and Beverages Market in Singapore” June 2013 available at: [http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0.pdf](http://www.sge.com/sites/default/files/private_files/BBK_Foodstudie_Singapore_June%202013_0.pdf)
adopt a medium to long term strategy and action plan to build their market in Singapore. This again means that small honey producing companies may have difficulties with getting their products on shelves in Singapore, as it requires a lot of resources to focus specifically on the Singaporean market and comply with all the requests from the importers, distributors and retailers.

3.13 Gum Resin and Plant Extracts

Consumption

Gums, resins and plant extracts are used in the cosmetics, the pharmaceutical and the food sector, as food additives (e.g. thickeners, emulsifiers, and flavors), pharmaceutical ingredients (e.g. demulcents), adhesives, and dyes (e.g. seed lac, shellac).

Previously, with the advent of cheaper, synthetic resins with suitable properties, the demand for the natural gums and resins has dropped. However, due to the continuing trend for natural ingredients in cosmetics, there is always the possibility of a resurgence of interest in some of the more traditional gums and resins – which are still, for example, approved for use in foods – to be used again in some cosmetics, especially considering the exotic origins and potential benefits to small producers in developing countries.\(^\text{302}\)

Gums and Resins are used as food additives in production of chewing gums. However, due to problems created by chewing gum litter, a ban on the sale, import and manufacture of chewing gum in Singapore took effect on 3 January 1992.\(^\text{303}\) The total ban of chewing gum was lifted partially in March 2004.\(^\text{304}\) Medicinal and dental gums products became available in Singapore. The consumption of gums in Singapore remains limited to medical use.

Consumer Profiles

Gums, resins and plant extract are used throughout the food industry in products such as margarine, chocolate, chewing gum, bakery, and convenience foods, as well as in increasing numbers of cosmetic, pharmaceutical and technical applications.\(^\text{305}\) Food processing industry is one of the main sectors that consume gums, resins and plant extract. However, Singapore’s food processing sector is relatively small due to limited natural resources, livestock and agricultural production.\(^\text{306}\) SPRING Singapore also labels food processing industry as developing industry in Singapore, contributing to 0.7% of


Singapore’s total GDP.307 This means the consumption of gums, resins and plant extract in food processing industry is also small since the sector is small.

In pharmaceutical industry, gums and resins are used in production for functional benefits such as thickening, stabilizing. The pharmaceutical sector forms a significant share of Singapore’s economy, and Singapore is growing to be the pharmaceutical hub in the region.308 This means that the consumption of gums, resins and plant extract in pharmaceutical industry has potential.

**Consumer Trends**

In both food and pharmaceutical industry, where gums, resins and plant extracts are heavily consumed, the public’s growing awareness about health and demand for a healthier and fuss-free lifestyle is also driving the trend towards natural and multifunctional products.

Natural ingredients are expanding in product development. Consumers are showing their preference for products containing natural extracts and fewer chemicals. The popularity of brands in the natural beauty segment is further prompting manufacturers to develop products with natural ingredients.309 Nielsen’s research also highlights that 69 % of Southeast Asian consumers prefer products made with fresh, natural and/or organic ingredients.310

Clearly, this market is poised for growth, with consumer demand for organic and natural products buoyed by increasing product awareness and rising disposable incomes, amid mounting health concerns. 311

**Challenges for EU products**

The market for consumption of gums and resins in food processing and pharmaceutical sectors is limited. Even though pharmaceutical sector in Singapore in growing and has potential, the focus however is in Research and Development312, with less focus on manufacturing.

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Furthermore, natural resins and gums still face strong competition from synthetic resins. Singapore has an established chemical industry, with big international companies setting up plants in Singapore\(^{313}\), offering synthetic resins to the market and for export.

**Offer**

**Domestic Offer**

As Singapore lacks natural resources on its own, and it is located in a region where surrounding countries offer abundant raw materials for gums and resins production, domestic resins gums production in Singapore usually involve importing of raw materials from surrounding countries, processing and manufacturing of imported raw materials from surrounding countries. Some of the final products are exported overseas while some kept for domestic consumption.

As a small country, Singapore constitutes a major supplier of natural resins gums in the international market, having a market share of 1.4% in 2014. \(^{314}\)

**Import**

Singapore’s import of gums, resins and other vegetable saps and extracts has fluctuated over the last five years. The top five importers into Singapore are China, USA, Netherlands, Germany, and France. \(^{315}\)

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\(^{313}\) Such as Lanxess, Sumitomo Chemical and ExxonMobil


Singapore’s import of EU gums, resins and plant extracts has been increasing slowly.

Figure 38 Imports of Gums, Resins and Other Vegetable Extracts into Singapore (2011-2015)\(^{316}\)

Figure 39 Singapore’s Imports of Gum Resins and Plant Extracts from the EU (2011-2015)\(^{317}\)

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European companies occupy a large share in the import of gum arabic into Singapore. Top suppliers of gum arabic imported by Singapore in 2010 are France, United Kingdom, Germany, USA, Japan, Belgium, and Malaysia.\textsuperscript{318}

**Export**

Singapore with a growing pharmaceutical-chemical industry hub in the region also exports a great share of its gums and resins production.

Singapore’s export of gums and resins has been increasing for the past 5 years. Top 5 exporting market are China, USA, Malaysia, Argentina and Italy.

![Figure 40 Singapore’s Exports of Gum Resin and Plant Extract (2011-2015)\textsuperscript{319}](image-url)

Furthermore, Singapore is the second largest exporter of Oblibanum, myrrh and dragon’s blood to China in 2010, with total export value of USD 358 000, and is the top 10 exporter of other gums and resins to Mexico, with total export value of USD 4000. \textsuperscript{320}

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Singapore also export gum, resins and plant extracts to the EU. Export of these products from Singapore to the EU has been steady, keeping at one million euros every year from 2011 to 2015.  

**Mapping of Main Competitors**

Producers of gums, resins and plant extract in Singapore usually consist of two groups of firms, one type is international firms headquartered in Singapore, who may or may not have manufacturing plants in Singapore, and usually use Singapore as a trading hub for their goods. Second type of firms is local firms that process some gums and resins, and deliver the final product for domestic consumption and for export.

**KTRADE**

KTRADE is a reputable processor and exporter of gums, spices and herbs. They are headquartered in Singapore with reliable processing units in Indonesia. They have strong foundation in the processing related products of Natural Gum Copal, Gum Damar, Oleo Pine Resin, Gum Benjamin, Damarbatu and Cassia.

**Bayer (South East Asia) Pte Ltd**

Bayer is a research-based, growth-oriented international enterprise with core competencies in the fields of health care, nutrition and innovative materials. Bayer (South East Asia) Pte Ltd is headquartered in Singapore, as a regional administrative hub for Bayer’s operations in South East Asia.

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Behn Meyer Specialist Chemical LLP

Behn Meyer Specialist Chemical LLP is an international specialty chemical company established in 1840 in Singapore, and is today known as one of the largest and best-known German trading houses. It provides a wide range of specialty chemicals, used in food, personal care, animal nutrition, water treatment, rubber etc.

Nanyang Gum Benjamin Manufacturing (Ptd) Ltd

Nanyang Gum Benjamin Manufacturing (Ptd) Ltd is a local manufacturer and exporter of gum and natural resins, established in Singapore in 1969.

Hong Huat Hung Industrial Ptd Ltd

Hong Huat Hung Industrial Ptd Ltd is a local producer, distributor and wholesaler of natural resins.

**Challenges for EU products**

Generally, the F&B product market in Singapore is intensely competitive, with a large number of global players aggressively competing for market share. Quality products are often competing on price. Top five importers into Singapore are China, USA, Netherlands, Germany, and France. European sources of gums and resins are already taking up large portion of importer share of the market, making it hard to distinguish new EU gums and resins entering the market.

**Specific Customs and SPS Requirements for Import**

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In terms of market access, countries importing goods to Singapore do not encounter significant trade barriers. Singapore is essentially a free port for imported gums, resins and plant extracts. Thus, the import of gums, resins and plant extracts is not subjected to extra tariff\(^{328}\), though a 7% Goods and Services Tax on all goods will still apply to imported gums, resins and plant extracts into Singapore.

Phytosanitary Certificate is required for import of gums, resins and plant extract into Singapore. This is a certificate that certifies plant and plant products are free from regulated pests, and conform to other phytosanitary requirements as specified from the importing country. Importing companies need submit applications to the Agri-food & Veterinary Authority (AVA) of Singapore and provide information regarding the botanical names of plants, place of origin, foreign phytosanitary certificate number, disinfection treatment etc.\(^{329}\)

Singapore also has strict regulation on food additives permitted under the Singapore food regulations. These restrictions need to be taken into account when exporting food additive gums, resins and plant extracts into Singapore. More information regarding the list of permitted food additives can be found at [http://www.ava.gov.sg/docs/default-source/tools-and-resources/resources-for-businesses/foodadditivesunderfr_inclnewadditivesunderfdamdre](http://www.ava.gov.sg/docs/default-source/tools-and-resources/resources-for-businesses/foodadditivesunderfr_inclnewadditivesunderfdamdre).

**Distribution**

Singapore is a trading hub for the region; gums, resins and plant extract are imported, with some kept for domestic consumption, and others re-exported to international destination. Importing, distributing, and wholesaling of gums resins and plant extract are done by trading companies. Local firms that process gums and resins are usually importers, exporters, and wholesalers as well.

Connell Brothers

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Connell Brothers is the largest and one of the most highly respected marketers and distributors of specialty chemicals and ingredients in Asia-Pacific. They are the distributor of PINOVA group in Singapore; PINOVA group is an international company delivers high quality specialty rosin, polyterpene resins, and sensory ingredients for many of the world’s most essential industries and best-known brands.

Tact Chemie S.E.A. Pte Ltd

Tact Chemie S.E.A Pte Ltd is importer, exporter, and wholesaler of raw materials for pharmaceuticals including resins in Singapore.

Dow Corning Singapore Pte Ltd

Dow Corning Singapore Pte Ltd is importer, exporter, and wholesaler of raw materials for pharmaceuticals including resins in Singapore.

Tjiat Seng & Company Pte Ltd

Tjiat Seng & Company Pte Ltd is a local importer, exporter and wholesalers of natural resins, rubber, natural produces.

Nanyang Gum Benjamin Manufacturing (Ptd) Ltd

Nanyang Gum Benjamin Manufacturing (Ptd) Ltd is a local manufacturer and exporter of gum and natural resins, established in Singapore in 1969.

Hong Huat Hung Industrial Ptd Ltd

Hong Huat Hung Industrial Ptd Ltd is a local producer, distributor and wholesaler of natural resins.

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Challenges for EU Products

As the consumption market in Singapore for gums and resins in Singapore is small, bigger distributor of gums and resins in Singapore mostly use Singapore as a trading hub for importing and re-exporting of gums and resins to regional markets. Distributors to manufacturers in Singapore are usually small local firms.
3.14 Cotton and Live Plants

Consumption

Flowers are important in the Hindu culture. They are central in the puja (worship) and are used in different ceremonies such as birth, funerals, weddings etc. As the religiosity and financial standing in Indonesia is relatively high, and there is also an inflow of Indian Hindus, consumption of flowers is quite high. In addition, some ceremonies of other religions in Singapore, such as Buddhism, Taoism and Islam also use flowers. Other regular consumers of flowers are hospitals and restaurants.333

Cotton domestic consumption in Singapore is insignificant, reported use in 480-lb bales as well as in MT (accepted measuring units in cotton) for 2015 was 0.334 One reason might be increased production costs in Singapore, which has caused Singaporean producers in different sectors to move their production to neighbouring countries. As explained by one producer: "In Singapore definitely we can't own the land...We can't buy the land. We can only bid for it from the Government. We can only rent it from the Government."335

Consumer Profile

Singaporean consumers of flowers are especially sensitive to the quality and freshness of the plants. Flowers and plants consumed for religious purposes need to be especially fresh and in good condition. If they are brown, faded or old, or if the jasmine is fully opened, they would be hard to sell.336

Consumer Trends

Commercial floriculture production in Southeast Asia was historically developed because of increasing need for low cost flowers by the European cut flower market place. Unlike other regions, such as Africa, South and Central America, in which cut flowers are mainly produced for export, in Asia the market potential for cut flowers has rapidly changed to include opportunities for supplying the local market as well. This unique development is on account, among others, of high population densities, and the consumer perception

336 Ibid.
which has been promoted heavily by the European flower industry that the use of fresh flowers in one’s everyday life represents an improved, quality lifestyle.\textsuperscript{337} For some flowers, the demand is seasonal. Festivals like the Lunar New Year and Qing Ming have been observed as associated with increased consumption of flowers.\textsuperscript{338}

\textbf{Challenges for EU Products}

Given the importance of freshness in live plants, and especially flowers, EU products face hard competition from producers in Asia. This challenge is reinforced by the general tendency of Singaporean consumers to be price sensitive. Likewise, currently most flowers are imported from Asian neighbours and it might be challenging to persuade consumers, who tend to be brand-loyal, to buy European instead of Asian products. Preference for local products is especially eminent with regards to tropical orchids, which are considered a national symbol. Changi Airport buys about 12,000 stalks of orchids every month to be displayed around its three terminals. It gets the blooms from local farmers. Local retailers like jewellery designer RISIS, which uses real orchids in its design, also use local suppliers.

\textbf{Offer}

\textbf{Domestic Offer}

For cotton, Singapore's exports represent 0.1\% of world exports and 0.1\% of world imports. Its ranking in world exports is 59 and in imports 71. For live plants, Singapore's

\textsuperscript{337} United Nations, Food and Agriculture Organisation, “Potential of Commercial Floriculture in Asia: Opportunities for cut flowers development” last accessed on 27 September 2016 available at: file:///Volumes/NO\%20NAME/Snapshots/FAO\%20POTENTIAL\%20OF\%20COMMERCIAL\%20FL ORICULTURE\%20IN\%20ASIA.webarchive,

exports represent 0.1% of world exports and 0.7% of world imports. It’s ranking in world exports is 42 and in imports 26.\footnote{International Trade Centre: “Trade map 2015”, last accessed on 28 September 2016 available at: \url{http://www.trademap.org/Index.aspx}}

**Import**

In the cotton market, exports from the EU to Singapore over the past 5 years remain low and relatively constant.\footnote{According to a factsheet published by the EU Commission, DG for agriculture and rural development, EU cotton exports to Singapore in Million Euros have been 0 over the past 5 years. This figure, however, might be due to lack of sufficient statistical data.} In 2015, the total exported value was 4.67 Million USD (4.17 M EUR). While in imports of cotton from most of EU member states to Indonesia there has been a decline or stagnation, in imports from Bulgaria and the Netherlands there has been a significant growth in value, especially between 2014 and 2015. The majority of cotton imports from the EU to Singapore originate in France (about 74% in EU total in 2015).

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{cotton_imports.png}
\caption{Growth in Value of Singaporean Imports of Cotton from the EU (% p.a.)}
\label{fig:cotton_imports}
\end{figure}


In the live plants market, the overall evolution over the past 5 years shows the imported value of live plants from the EU to Singapore as constant. However, between 2014 and
2015 there was a sharp increase in imported value in few member states. This change was most significant in imports from Belgium, and to some degree Italy and Spain. Still, as is generally the case in this product category, most of the EU exports to Singapore originate from the Netherlands (about 80% of EU total). In 2015, the imported value of live plants from the EU to Singapore was 3.98 million USD (3.55 M EUR).

![Figure 42 Singapore's Imports of Live Plants from the EU (2011-2015)](image)

Source: EU Commission

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Singapore imports most of its live plants and flowers from its region, mainly from Malaysia and Taiwan. Thus, Singapore does not constitute a major export destination for the EU in this category relative to other countries. Main export destinations are the Russian Federation (21.3% of total EU exports of plants and floriculture products in 2014) and Switzerland (20.7%), followed by the US (10.2%) and Norway (8.8%).

**Export**

Cotton exports from Singapore to the EU are relatively limited. In 2015, the value of total exports was 41 K USD (36.57 K EUR), constituting 0.6 of total EU food and agriculture imports that year. Most of the exports were to the Netherlands and France, and some to Germany.

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343 International Trade Centre: "List of supplying markets for the product imported by Singapore in 2015 Product: 06 Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage" last accessed on 27 September 2016 available at: [http://www.trademap.org/Country_SelProductCountry.aspx?nvpm=1|702|||06|||2|1|1|1|1||2|1]


In live plants, the total value of exports from Singapore to the EU in 2015 was 5.3 Million USD (4.73 M EUR). The main importing EU member states that year were the Netherlands, Germany, Denmark and the United Kingdom. Yet, over the past 5 years exports from Singapore to the EU in this category has been declining, including exports to these 4 main importers. The only EU member state to whom exports of live plants from Singapore increased during this period is Belgium. An especially significant decline has been noted in exports of bulbs, roots and live plants (not including cut flowers and plants).

![Figure 44 Growth in Value of Singaporean Exports of Live Plants to the EU (% p.a.)](image)

Source: International Trade Centre³⁴⁸

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Although the floriculture industry in recent years in Southeast Asia has been growing fast, Singapore is not a significant player in it. Even in the region, it is not a big producer or exporter of cut flowers. The role of Singapore as an origin of exports to the EU in this category is therefore minor. Most imported products to the EU in this category originate from Kenya (28.1% of total EU imports of plants and floriculture products in 2014) Ethiopia (10.6%) and Costa Rica (9.3%).

An exception is the Singaporean production and export of a variety of quality cut orchids. Singapore ranks among the world top 5 exporters of orchids. Although local farms struggle with rising production costs, lack of resources for research and development as well as rising competition, suppliers have thus far managed to maintain Singapore’s position as a niche supplier of quality orchids.

**Mapping Main Competitors on the Market**

351 Singapore Department of statistics, “Yearbook of Statistics Singapore 2015”
Many florists and floriculture companies operate in Singapore. Few especially large ones are listed below. All of the centres mentioned here offer online services and maintain internet and social media communication venues in English.

With several locations and retail as well as wholesale services, Ban Nee Chen, Incorporated in 1968, is a well-established gardening giant in Singapore. It offers a wide selection of plants and flowers, as well as professional landscaping and nursery business including ornamental horticulture.

**Ban Nee Chen PTE LTD**

Song Lang Garden – Song Lang Garden is well-established, family-run East Coast gardening centre. It supplies a wide range of plants and flowers.

**Song Lang Garden**

Far East Flora is a large Singaporean floriculture company. Apart from the local market in Singapore, they also offer International delivery. This service include most of EU countries: Austria, Belgium, Croatia, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, the Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain and the UK.

**Far East Flora**

Specific customs and SPS requirements for import

To import plant and plant products, there is a need for a phytosanitary certificate from the country of origin, as well as an import permit from the AVA (Agri-Food & Veterinary Authority of Singapore). For Fresh fruit, vegetables, flowers and other plant produce there are also specific health requirements, such as post-entry inspection at premises pre-approved by AVA. Importing endangered species of plants and plant products requires a CITES permit by the authority of the importing and countries. After all the
requirements have been fulfilled, an importer may obtain the import permit, also known as the Cargo Clearance Permit (CCP), through the online system “Tadenet”. The CCP is valid for 2 weeks and a fee of SGD11 is levied per permit.

Cotton is included in the list of approved Genetically Modified Crops for use as animal feed in Singapore.353

**Distribution**

As local consumption of cotton in Singapore is very limited, there is not much information regarding distribution of this product. Plants and flowers are mostly distributed through florists and gardening centres. Another option is through events organized by the National Parks authority in the Singaporean government, such as the “Gardeners’ day out” which took place on 10 September 2016.354 A report by the UN Food and Agriculture Organization has suggested establishing a regional distribution centre in Singapore or Bangkok. The centre, the report suggests, will be used to distribute floriculture products to other countries in the region, such as Japan, Korea and Taiwan.355 The initiative is directed towards the local producers, but it may serve foreign companies as well.

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355 United Nations, Food and Agriculture Organisation, “Potential of Commercial Floriculture in Asia: Opportunities for cut flowers development” last accessed on 29 September 2016 available at: [file:///Volumes/NO%20NAME/Snapshots/FAO%20%20POTENTIAL%20OF%20COMMERCIAL%20FLORICULTURE%20IN%20ASIA.webarchive](file:///Volumes/NO%20NAME/Snapshots/FAO%20%20POTENTIAL%20OF%20COMMERCIAL%20FLORICULTURE%20IN%20ASIA.webarchive)
4. COMMUNICATION

4.1 How does the consumer get influenced: By Whom and How?

Singapore is often chosen as the location for international F&B business headquarters in the South-East Asia because of its strategic location in the Asia Pacific region. In addition, it’s convenient business climate, together with the sophisticated customers, caters this preference. The average Singaporean customer is well aware of the international range of goods and services and therefore, they are open-minded and keen to try out new foreign products. The Singaporean shopper prefers globally established, prestigious and widely known brands over the less prestigious local products. While deciding upon their purchase, the customers deem various product attributes, such as organic production methods, gourmet/ customization aspect, quality of packaging, delivery and service, and other benefits gained when making the purchase, which has made the price category less significant.

The food retailers in Singapore can be divided into four main categories: i) large retailers including supermarkets and hypermarkets; ii) convenience retailers; iii) traditional stores and iii) specialty stores. In general, the food sector is dominated by three key corporations: the NTUC FairPrice Cooperative, Dairy Farm International and Sheng Siong Supermarket. Besides the small and individual markets in Singapore, there big supermarket chains include Sheng Siong, Cold Storage, FairPrice Finest and Fair Price, Giant and Market Place by Jasons. All of these supermarkets also provide online shopping possibility. Independent, outlet shops in Singapore include Huber's Butchery, Ben Foods, Foodie Market Place and Mustafa Centre. There are also food retailers available only online, these include for example QB Food and Redmart.

How to successfully present the products to the consumer in Singapore?

With all of the age groups using Internet in Singapore, it is the home of tech-savvy individuals and communities for whom online tools are an essential part of everyday life. Singapore is ranked as one of the highest in the world for smartphone penetration with 85% of its population regularly using a mobile device. Singapore can be described as the hub for technological innovations. Therefore, it is closely aligned to the global trends, news and appetites. The advanced accessibility to online platforms has also opened a vast pool of the online sales and marketing channels. In Singapore, some 60% browse shopping websites or apps weekly and almost 20 % make weekly an online purchase of a product. Online shopping is affiliated with comfort of purchasing from homes or on-the-go, as well as saving of time and smaller expenditures. The FedEx commissioned study in 2015 revealed that Singaporeans are increasingly using digital pay methods, with 76% of Singaporeans using digital payment platforms to pay for their online shopping. Thereby, advertising your products or services online, allowing online purchase on your website and making your goods purchasable on the local e-commerce

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357 Calugar-Pop, Cornelia; Lee, Paul & Stewart, Duncan, “Technology, Media, and Telecommunications (TMT),” Deloitte, pg. 12, 2016
platforms provide advantages against the other competitors. The Nielsen Executive Director Connie Cheng said that the companies’ success depends on how they “…leverage on technology to provide an engaging and seamless shopping experience, which increases the opportunity for sales conversion and repeated business”. Additionally, the online presence further initiates business internationalization around South-East Asian region.

According to Nielsen, 41% of Singaporeans are largely Omni-channel shoppers who enjoy browsing online for information and purchase at both online and offline retail channels. 17% of Singaporean shoppers are loyal online shopaholics and are fully dependent on e-Commerce sites for browsing and making their purchases. Thirdly, Webroomers, the fundamentally offline shoppers form 12% of Singaporeans and gather information from online and offline sources, but shop at brick and mortar stores.

Singapore’s social media landscape is also developing at a fast pace. Over 80% of the young people, 18-24 year-olds have access to laptop and smartphone in Singapore, however, regarding future technology purchases there is prevailing tendency to buy smartphones rather than laptops.

As fast as the market develops and technology advances in Singapore, the customers’ needs and interests follow. The consumers are curiously looking for cutting-edge technologies, most recent releases and latest trends what raises challenges for suppliers and business owners who have to keep up with their fast changing preferences. Therefore, the businesses have to be flexible and innovative while ensuring their distinctiveness among other competitors selling similar goods.

**Traditional Promotion Channels – TV, Radio, Print Periodicals**

Television is the most popular advertising medium in Singapore, but it is also the most expensive as almost all households in Singapore have their own television sets. Alternative to Television campaigns are print media, transit media, and radio (which is the least expensive and most traditional form of mass marketing channel). In a comprehensive promotion campaign, these channels shall not exclude each other, but should be used as complementary depending on the target group of a particular product in promotion. The print media in Singapore is published in all four of its official languages with the English press capturing 49.1%, the Chinese newspapers 43.9%, the Malay 6.2% and Tamil 0.8% of the total circulation.

The most watched F&B related TV shows include:


The most read Newspapers include:

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360 Ibid.

361 Calugar-Pop, Cornelia; Lee, Paul & Stewart, Duncan, “Technology, Media, and Telecommunications (TMT),” Deloitte, pg. 8, 2016

167
• The Straits Time (www.straitstimes.com/global) is an English daily morning newspaper which also includes a Food and Lifestyle section and is the most popular newspaper in Singapore.

• The Lianhe Zaobao (www.zaobao.com.sg) - United Morning News - is a Chinese morning daily that is second most popular newspaper in Singapore.

• Lianhe Wanbao (www.sph.com.sg) - United Evening News - is a Chinese afternoon daily that is third most popular newspaper in Singapore.

• The Shin Min Daily (www.sph.com.sg) is a Chinese afternoon newspaper.

• The New Paper (www.tnp.sg) is an afternoon English daily.

• Berita Harian (www.bharian.com.my) is a Malay morning daily.

• Business Times (www.businesstimes.com.sg) is an English trade and commerce-oriented daily newspaper.

• Tamil Murasu (www.tamilmurasu.com.sg) is a Tamil morning daily.

• Today (www.todayonline.com) is a recent English morning newspaper which is currently free of charge.

The most read F&B related Magazines include:

• Savour (www.sphmagazines.com.sg/magazines/savour) is a food and lifestyle magazine published for Cold Storage, the Singapore's oldest established supermarket operator.

• Gourmet Living (www.gourmetimp.com) is a bimonthly bilingual food magazine dedicated to restaurant and food reviews and recipes.

• Epicure Food Magazine (www.epicureasia.com) is a monthly gourmet lifestyle magazine which offers the latest dining trends and F&B related news on the local and international culinary scene.

The most popular Radio stations include:

• MediaCorp Radio (www.meradio.sg)

• SAFRA Radio (www.safra.sg)

• SPH UnionWorks (www.sph.com.sg)

Modern Promotion Channels – Online Platforms

In 2015, the number of internet users in the country compared to the total population was 84% which is the highest share among other South-East Asian countries. While WhatsApp is the most popular social network, next to Facebook, in Singapore, also other social media and mobile messaging apps, such as LINE and WeChat take increasing
market share.\textsuperscript{362} As of November 2015, 67\% of Singaporean total population visited the most active social network site on a monthly basis.\textsuperscript{363} The most popular social network was WhatsApp with a 46\% penetration rate, followed by Facebook with 43\%, Facebook Messenger with 26\%, Instagram with 18 \% and GooglePlus, LINE and LinkedIn with 14\% combined.\textsuperscript{364}

In 2015, 61\% of Singaporean social media users from the total population logged in via their mobile device in the past 30 days. This proves that smartphones are preferred over traditional desktop computing. Smartphones are used to seek information on available goods and services, ongoing campaigns, product reviews, user experiences and comments. Therefore, all of the information shared on online platforms by the customers plays a great role in the future purchase decision.

Some of the most popular F&B related online mediums and blogs in Singapore include:

- Food for Life (\url{www.foodforlifetv.sg}) is a Singaporean online food channel that also hosts video blog series, including 5 different series and 26 episodes all together. Also, the online platform has an article section.

- Cooking Channel TV (\url{www.cookingchanneltv.com}) is an online “entertainment brand dedicated to today's passionate food lover.” Among other communication mediums, they also offer blog section and cooking videos.

- Food Panda (\url{www.magazine.foodpanda.sg}) is a F&B related online magazine that offers restaurant recommendations, new trends, cooking recipes etc.

- Hungry Go Where (\url{www.hungrygowhere.com}) is a F&B related online platform that includes F&B guides, restaurant recommendations, opinion section, special offers, book a table option etc.

- Lady Iron Chef (\url{www.ladyironchef.com}) is a F&B related independent and stand-alone company with no affiliation with any blogging company and management. The blog writes about personal experiences from daily life, dishing out honest reviews about food and dining places, countries and cities that he travels to and visits, and generic lifestyle products.

Some other online mediums that relate to F&B topics in Singapore include:

- Channel NewsAsia (\url{www.channelnewsasia.com}) is an online news platform that, belonging to MediaCorp, also hosts a health and Lifestyle section.

- Taggle (\url{www.lifestyle.toggle.sg/en/food}) is an online entertainment medium that, belonging to MediaCorp, also hosts a Food section.

- Today (\url{www.todayonline.com}) is an Asian focused more comprehensive online news platform that, belonging to MediaCorp, also hosts a food, lifestyle, blog and video sections.

\textsuperscript{362} Tey, Yvonne, “The state of social media in Singapore,” Tech in Asia, 20 August 2015, available at: \url{www.techinasia.com/talk/state-social-singapore}

\textsuperscript{363} Ibid.

Some of the most popular F&B related TV shows in Singapore include:

- **Asian Food Channel (AFC) (www.asianfoodchannel.com)** is a food-focused channel that entertains viewers with a range of local and international content from reality, lifestyle to travelogue program formats. The AFC is available in more than 10 countries, including in Singapore on StarHub TV Channel 435.

- **Food Network (www.foodnetworkasia.com)** is a lifestyle network that connects viewers to the power and joy of food. The Food Network is available in more than 10 countries in Asia Pacific, including in Singapore on Starhub Channel 433.

- **Food for Life (www.foodforlifetv.sg)** is another Singaporean food channel that features food and cookery content that is both locally-produced and internationally-sourced. The channel can be viewed via any internet-connected device such as computer, smart phone, tablet or smart TV.

- **Cooking Channel TV (www.cookingchanneltv.com)** is an online “entertainment brand dedicated to today's passionate food lover.” Among other communication mediums, they also offer online TV shows.

### 4.2 Example of current communication campaigns made by main investor

#### Example #1 Pokka Singapore

Pokka Singapore is a beverage company that produces various drinks in the country since 1977. Their products, including fruit juices, coffee, tea, water, carbonated drinks etc., are sold in around 60 countries worldwide. The brand also owns and operates restaurant chains as well as (cashless) vending machines. Their brand derives from notions as health, vitality and freshness by highlighting nutritional value in their products and encouraging healthy life choices. Their campaigns run in social media channels such as Facebook, Twitter and YouTube. In 2015, in line with the celebration of SG50 (50th anniversary of Singapore), Pokka held a campaign under hashtags #SayThanksWithPokka and #AWayWeSayThkYou. During the campaign they launched videos in YouTube where the most watched video has collected almost 300 000 views as of 2016. All together the Pokka Singapore YouTube account has 32 videos, in English and Chinese, with 1 367 149 views. Their campaigns also engage local celebrities who endorse their products. In 2016, the Pokka launched a 'story-telling’ campaign entitled "POKKA GREEN TEA DONATION DRIVE FOR SINGAPORE CANCER SOCIETY 2016“ under a slogan “Let's Fight Cancer Together”. The campaign encourages people to share cancer-related video stories published by Pokka on Facebook. The videos present two famous Singaporeans, a singer and an actor sharing their stories on fighting with the deadly disease. Pokka announced that for every Facebook share, they will donate $0.50 to Singapore Cancer Society, their main donation drive. As well as, if the video hits 20k shares by 30 September 2016, they will allocate an additional $10,000 for donation. For every liter of POKKA Green Tea purchased during the donation period, 1 August – 30
September 2016, POKKA would donate a specified amount to Singapore Cancer Society (for less than 1M liters they will donate 0.6¢ / liter, for 1M liters – 2.5M liters they will donate 0.8¢ / liter from 1M liters onwards, for 2.5M liters – 5M liters they will donate 1¢ / liter from 2.5M liters onwards and for 5M liters and above they will donate $50,000). As it is too soon to analyze the impact of this campaign strategy, the company derives from emotional, humane aspects with features from CSR and voluntary service. It leverages on the compassion and highlights a message that “There’s no price tag on health” while suitably accommodating an advertisement on its Green Tea product that in return boosts the revenue.

**Example #2 – Tiger Beer Singapore**

Tiger Beer is one of Singapore’s most known brands which roots date back to a Malayan Brewery established in 1930. Today the Tiger Beer is sold in over 75 countries worldwide. In 2014 the brand introduced a marketing campaign called “Uncaged”. The ideas behind the strategy targeted bold, ruthless and brave young Asians who would escape the traditional limitations and norms, and break out their social ‘cages’ to follow life ways they actually desire. The campaign released videos about a Tattoo artist, a magician, a painting entertainer, a stuntman and a filmmaker who all followed their adventurous life paths. The video series has reached hundreds of thousands viewers. In 2016, the Tiger Beer launched a campaign, or rather a movement that seeks to preserve beer-oriented traditional street food culture in Singapore that is being jeopardized by increasingly emerging fancy, high-end restaurants. Tiger Beer announced that from every 6-pack Tiger Beer bought from local retailers from 1 April to 31 May 2016, it will set aside 20 cents for the street food movement, and reinvest the amount into Singaporean hawkers, the open-air street food complexes. Also for this campaign a series of videos were published to tell real-life stories of hawkers, the Singapore’s traditional street food culture and the importance of sustaining this local heritage. The first three films from the series detail how Popiah, a fresh spring roll delight, is made locally. Under a slogan “Your Meal Today is on Tiger Beer”, they encouraged people to eat more at hawkers by giving out $5 meal coupons at selected food places for free. The campaign is advertised under a hashtag #uncagestreetfood combining the branding from their previous “Uncaged” campaign and the new concept of street food. The Tiger Beer Singapore Twitter account is followed by 776 followers. On the Tiger Beer Facebook account they have almost 1, 9 million likes as of 2016. The Tiger Beer Singapore YouTube channel has all together 52 videos and the most watched one has almost 1, 5 million views as of 2016. Also their Instagram account with 923 followers is packed with mostly video clips. Tiger Beer is another example on how personalised, down-to-earth ‘story-telling’ approach has been implemented in order to be relatable among their target group.
5. DOS AND DON’TS

To avoid cultural misunderstandings it is advisable to take into account the following information.

DO

- Raise your hand to get someone's attention.
- Remove your shoes when entering a private home, a temple or a mosque.
- Speak in low, calm tones of voice.
- Leave a little food on your plate when you have finished eating your meal.

DON’T

- Signal or point at a person with your index finger, which is considered very rude.
- Eat or offer anything (including a handshake) to a person of Indian or Malay descent with your left hand as they will most likely be Muslim and this is forbidden by their hygienic jurisprudence.
- Stand tall with your hands on your hips, which is typically perceived as an angry, aggressive stance
- Publicly display affection.
- Show anger or emotions or raise your voice. Remain disciplined and in control.
- Cross another person’s chopsticks when you are reaching for something, or rest chopsticks in a bowl or on a plate. You should always place chopsticks in a rest, or on a separate plate; to place the chopsticks across your bowl or plate shows that you are still hungry.
- Discuss religion or politics.
- Make jokes. Few jokes will be understood or appreciated.

Greeting

- The standard greeting is a firm handshake. Shake hands with everyone present at a business meeting or social occasion. Shake hands again when leaving. Singaporeans may bow slightly as they shake your hand. Many Westerners are generally taller than Singaporeans, so it would be polite to give a small bow. A slight bow for Chinese or older people is polite.
- Conservative Muslims avoid touching the opposite sex, so a man meeting a Malay woman should let her offer her hand first and a woman meeting a Malay man should wait for him to offer his hand. If they opt to place their hand on the heart and bow slightly instead, just follow suit. Singaporeans generally do not hug, especially if it is someone they have just met, and doing so would probably make your host feel awkward, though the other person will probably be too polite to say anything as saving face is a major Asian value.

Corporate Culture

Westerners are expected to be punctual for social occasions and business meetings. Call if you are delayed. Tardiness is viewed as a sign of disrespect.

The government finances many of the large corporations in Singapore. This bureaucratic system is known for its high efficiency and corruption-free business style. Western-style management is evident in large firms managed by Singaporeans.

Personal contacts are important in business. It takes several years to develop business relationships. Take time to know people before discussing business.

Singaporeans tend to get right down to business in meetings. Singaporeans are fast-paced and can make decisions quickly.

You are expected to deliver reports, correspondence, packages, etc. when promised.

Always talk straight and get right to the point with Singaporeans. You can be direct when dealing with issues of money.

When entertaining Malay associates (who are Muslim) avoid conducting business on Fridays or during the Ramadan (the Muslim fasting month). Never serve alcohol or pork. Most Indians do not eat beef as well. The inviting party of a business social event usually picks up the bill. The other party can reciprocate next time around.

Gifts

- Each ethnic group shares different gift giving traditions.
- Business gifts are generally not exchanged. Small business-related gifts such as a pen with the company logo would be sufficient.
- Use both hands to give someone a gift. A gift given to a guest or the host is not opened in the presence of the giver. Always bring the hosts a gift when invited to someone's home.
- Be careful of the gift being misinterpreted as a bribe, even a small gift. Never give a government official a gift, which might be considered a bribe.
- Gifts with connotation of severance or cutting, such as scissors, are not appropriate as they symbolize conflict. For the Chinese, the number 4 rhymes with the word for death meaning that it is important not to give anything in a set of four. Clocks are also considered inappropriate gifts, as the Chinese expression for ‘giving clock’ has connotations to death. For your Malay associates, avoid products made from pigskin and alcohol as these goods contravene the laws of Islam.

Dress

- Due to different ethnic groups and the modern character of Singaporeans, there are much different acceptable attire. Dress is normally very casual. Western clothing is most common.
- For business, men should wear white shirts, tie and slacks. Jackets are usually not required.
- Women should wear blouses with sleeves and skirts or pantsuits.

Communication Style
- **Indirect**: relationship and face – preservation of harmony - dictate an indirect style in public. Disagreement and negative replies are muted, especially with superiors.

- **High Context**: disturbing information may be conveyed in non-verbal channels or via third party. There are many ways of saying “no” without uttering the word. Relationship determines the nature of the communication.

- **Formal** settings: titles and family names are used, but business among acquaintances is conducted on a first name basis, although hierarchy is always respected and acknowledged.

- **Restrained**: deference to harmony and cooperation require self-control and restrained emotional expression. Losing one’s temper causes loss of face to both the offended and the offender.

**Tipping**

Don’t feel obligated to tip. It is not considered bad manners to tip, but doing so is simply not part of the culture here. It is definitely not like the West, where you’re often expected to tip, even if you aren’t impressed with the service received. In restaurants here, a service charge of 10% is levied on top of your purchases – it is simply included in your bill. It is not the norm to tip taxi drivers, and they do not expect it. Of course, you are still welcome to tip if you so desire.

**Body language**

Singaporeans are reserved in nature, so it is useful to be aware of their body language and verbal cues. The direct look may be interpreted as disrespect, or worse – as aggression. Catch your counterpart's eyes for a second, then immediately lower your head and look down. Your body language expresses that you are honouring the person in your presence.
6. SYNOPSIS

6.1 S.W.O.T Analysis

<table>
<thead>
<tr>
<th>SWOT</th>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td></td>
<td>General</td>
<td>General</td>
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<tr>
<td></td>
<td>Open market economy</td>
<td>Given that Singapore is a city-state, its small size restricts business development.</td>
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<tr>
<td></td>
<td>Highest per-capita income in ASEAN (GDP per capita: EUR 47,134)</td>
<td>Constant government intervention in business.</td>
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<td></td>
<td>Strong governance for businesses</td>
<td>Heavily dependent on international trade.</td>
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<td></td>
<td>Logistics and Financial Hub in Asia</td>
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<td></td>
<td>Infrastructure?</td>
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<td></td>
<td>Legal framework to protect IPRs</td>
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<tr>
<td></td>
<td>Low political risk and corruption free environment.</td>
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<tr>
<td></td>
<td>Good trade relations with the EU, aided by the EU-Singapore FTA</td>
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<tr>
<td></td>
<td>Product and Consumer Related</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consumers value EU food as healthy, top quality;</td>
<td>As a result of its heavy reliance on trade, Singapore is susceptible to global changes in commodity prices and demand shifts.</td>
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<tr>
<td></td>
<td>Consumer expenditure on F&amp;B has been gradually increasing and consumers now spend over 7% of their budgets on food and drinks;</td>
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<tr>
<td></td>
<td>Consumers are becoming aware of food safety issues and are willing to pay for healthy ingredients;</td>
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<tr>
<td></td>
<td>Strong presence of expatriate communities that are inclined to foreign food brands;</td>
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<tr>
<td></td>
<td>Willingness to try new brands, including foreign brands is high among Singaporeans.</td>
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<tr>
<td></td>
<td>Move to protect European GIs under EU-Singapore FTA, including enforcement in the case of infringement.</td>
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</table>

Opportunities | Threats
### General

**Taste of Europe**

**Singapore** – Market Entry Handbook

#### One of the wealthiest markets in South-East Asia.
Few barriers to entry

- **Purchasing power is high due to high levels of per-capita income.**
- **Small lower-income group. Whole population becomes target market.**
- **Keen buyers of foreign products:**
  - Singaporeans are open to products from developed markets like the EU that are of high quality and value-for-money.
- **Younger generation has the tendency to follow western culture and values.**
- **Tourism country:** More buyers from around the world every year.

#### Key location for expatriate families to reside in South East Asia

- **Singapore is one of the countries in the world with a Muslim population with the highest purchasing power.**

### Product and Consumer Related

#### High Import Dependence:
Approximately 90% of its food and drinks are imported.

- **The EU-Singapore FTA is expected to present significant opportunities for trade between the partners through the lowering of tariff and non-tariff barriers to trade.**
- **Singapore also has a highly developed and sophisticated cold chain distribution system, which has contributed to the country’s position as a hub for perishable products to be exported to other parts of the world.**
- **Rated as “one of the top 10 food cities in the world”, Singapore has a thriving and constantly evolving foodservice sector.**

#### Consumers have a modernized diet that includes a wide range of foreign concept foods and premium products.
- **Consumers are embracing healthy lifestyles and are incorporating healthy alternatives.**

### General

- **Sustained levels of consumer confidence will rely heavily on external factors, such as the now sluggish performance of the Chinese economy.**
- **Singapore is known for its ultra-competitive retail landscape.**
- **Difficulties reaching all consumer segments due to the existence of language barriers:**
  - **Official languages are English, Malay, Chinese and Tamil.**
  - **Buyers may be easily influenced by trends in larger Asian countries such as China and India.**

#### Import food price inflation over the past five years discourages consumption of imports.

- **As Singapore moves to becoming a Halal hub, meeting Halal requirements may be challenging for some EU producers.**
- **Marketing and distribution costs are extremely high for new product launches and also high for the on-going maintenance of market shares and positions.**
  - **Retailers are very profit margin driven because of their very high overheads, especially store rentals.**
- **High levels of product substitution:** Local products increasingly include market leading ASEAN-made products imported from Malaysia, Indonesia, Philippines, Vietnam and Thailand, which includes food and drinks produced by MNCs in the ASEAN regions.
- **Alcoholic beverages are subject to high duties and goods and services tax (GST).**
- **Singapore has established relatively rigorous regulations regarding processed food.**
### 6.2 Key Criteria for Success

<table>
<thead>
<tr>
<th>Product</th>
<th>Promotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Consumers value EU products as healthy and of premium quality;</td>
<td>• Television is the most popular advertising medium in Singapore, but it is also the most expensive as almost all households in Singapore have their own television sets.</td>
</tr>
<tr>
<td>• Consumers are becoming aware of food safety issues and are willing to pay for healthy ingredients;</td>
<td>• Alternative to television campaigns are print media, transit media, and radio, which are the least expensive and most traditional form of mass marketing channel.</td>
</tr>
<tr>
<td>• Consumers are embracing healthy lifestyles and are incorporating healthy alternatives.</td>
<td>• With all of the age groups using Internet in Singapore, it is the home of tech-savvy individuals and communities for whom online tools are an essential part of everyday life. Singapore is ranked as one of the highest in the world for smartphone penetration with 85% of its population regularly using a mobile device.</td>
</tr>
<tr>
<td>• The average Singaporean customer is well aware of the international range of goods and services and therefore, they are open-minded and keen to try out new foreign products.</td>
<td>• The advanced accessibility to online platforms has also opened a vast pool of the online sales and marketing channels. In Singapore, some 60% browse shopping websites or apps weekly and almost 20% make weekly an online purchase of a product</td>
</tr>
<tr>
<td>• The Singaporean shopper prefers globally established, prestigious and widely known brands over the less prestigious local products.</td>
<td></td>
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</tbody>
</table>
Tastes of Europe Singapore – Market Entry Handbook

divided into four main categories: i) large retailers including supermarkets and hypermarkets; ii) convenience retailers; iii) traditional stores and iii) specialty stores.

- In general, the food sector is dominated by three key corporations: the NTUC FairPrice Cooperative, Dairy Farm International and Sheng Siong Supermarket.

- Besides the small and individual markets in Singapore, there are big supermarket chains including Sheng Siong, Cold Storage, FairPrice Finest and Fair Price, Giant and Market Place by Jasons. All of these supermarkets also provide online shopping possibility.

- Independent, outlet shops in Singapore include Huber's Butchery, Ben Foods, Foodie Market Place and Mustafa Centre.

- There are also food retailers available only online, these include for example QB Food and Redmart.

- Rated as “one of the top 10 food cities in the world”, Singapore has a thriving and constantly evolving foodservice sector.

customers deem various product attributes, such as organic production methods, gourmet/ customization aspect, quality of packaging, delivery and service, and other benefits gained when making the purchase, which has made the price category less significant.

- Purchasing power is high due to high levels of per-capita income.

- Keen buyers of foreign products: Singaporeans are open to products from developed markets like the EU that are of high quality and value-for-money.

<table>
<thead>
<tr>
<th>Table 6 Key criteria for success</th>
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7. SUPPORT SERVICE DIRECTORY

7.1 European Union Organizations

Several EU funded or co-funded projects within Singapore offer a range of business facilitation services and information providing important insights into the Singaporean market. Depending on your company profile, these services can be free or fee-based, and are available for companies from any EU Member State.

- The European Chamber of Commerce in Singapore (EuroCham)

The European Chamber of Commerce in Singapore, known as EuroCham, was established in 2001 and is composed of the European National Business Groups in Singapore as well direct corporate members. EuroCham maintains close working relationships with the European Commission, European Union Delegation, European Bilateral Chambers of Commerce in Singapore, and European Embassies in Singapore. EuroCham’s mission is to represent the common interests of European businesses in promoting bilateral trade, services and investments between the countries of Europe and Singapore & the region.

Contact:
Address: 1 Phillip Street, #12-01 Royal One Phillip, Singapore 048692
Website: http://eurocham.org.sg/
Telephone: +65 6836 6681
E-mail: info@eurocham.org.sg

- EU-ASEAN Business Council (EU-ABC)

The EU-ASEAN Business Council (EU-ABC) is the primary voice for European Business within the ASEAN region, being endorsed as it is by the European Commission and recognised as such by ASEAN. Independent of both bodies, the Council has been established to help promote the interests of European businesses operating within ASEAN and to advocate for changes in policies and regulations which would help promote trade and investment between Europe and the ASEAN region. As such, the Council works on a sectorial and cross-industry basis to help improve the investment and trading conditions for European Businesses in the ASEAN region through influencing policy and decision makers throughout the region and in the EU, as well as acting as a platform for the exchange of information and ideas amongst its members and regional players within the ASEAN region.

Contact:
Address: 1 Phillip St #12-01. Royal One Phillip. Singapore 048692
Website: http://eu-asean.eu/
Telephone: +65 6836 6681
E-mail: info@eu-asean.eu
<table>
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<th>EU Member State</th>
<th>Address</th>
<th>Website</th>
<th>Contact information</th>
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| Austria         | 600 North Bridge Road, #24-04/05 Parkview Square, Singapore 188788 | [www.aussenministerium.at/oeb-singapur](http://www.aussenministerium.at/oeb-singapur) | Phone: (+65) 63 96 63 50  
E-Mail: singapur-ob(at)bmeia.gv.at |
Email: Singapore@diplobel.fed.be |
| Bulgaria        | The attending embassy for Singapore is the Bulgarian embassy in Indonesia. Jakarta 10310, 34-36, Jalan Imam Bonjol | [www.mfa.bg/embassies/indonesia](http://www.mfa.bg/embassies/indonesia) | Phone: +62 21 390 40 48  
Email: Embassy.Jakarta@mfa.bg |
| Croatia         | The attending embassy for Singapore is the Croatian embassy in Indonesia. Menara Mulia-Suite 2101 Jl. Gatot Subroto Kav. 9-11 Jakarta 12930. Indonesia. | [www.croatemb.or.id](http://www.croatemb.or.id) | Phone: +62 21 525 7822  
Email: jakarta@mvep.hr |
| Cyprus          | No representation | No representation | No representation |
Email: jakarta@embassy.mzv.cz |
| Denmark         | 101 Thomson Road #13-01/02 United Square. Singapore 307591 | [http://singapore.um.dk/en](http://singapore.um.dk/en) | Tel: +65 6355 5010  
Email: sinamb@um.dk |
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<td>Germany</td>
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<td>Greece</td>
<td>Honorary Consulate in Singapore 896 Dunearn Road, #04-08 Sime Darby Centre, Singapore 589472, Singapore</td>
<td><a href="http://www.mfa.gr/en/greece-bilateral-relations/singapore/contact-details-for-greek-missions.html">http://www.mfa.gr/en/greece-bilateral-relations/singapore/contact-details-for-greek-missions.html</a></td>
<td>Tel. : (0065) 68751205 E-mail : <a href="mailto:hellenic@singnet.com.sg">hellenic@singnet.com.sg</a></td>
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<td>Ireland</td>
<td>541 Orchard Road, Liat Towers, 8th Floor, Singapore 238881.</td>
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<td>101 Thomson Road #27-02 United Square Singapore 307591</td>
<td><a href="http://www.ambsingapore.esteri.it/ambasciata_singapore/it/">http://www.ambsingapore.esteri.it/ambasciata_singapore/it/</a></td>
<td>Tel.(65) 62506022 E-mail: <a href="mailto:consolare.singapore@esteri.it">consolare.singapore@esteri.it</a></td>
</tr>
<tr>
<td>Latvia</td>
<td>19 Cecil Street, #05-014 The Quadrant at Cecil Singapore 049704</td>
<td><a href="http://www.mfa.gov.lv/en/seoul/embassy/honorary-consul">http://www.mfa.gov.lv/en/seoul/embassy/honorary-consul</a></td>
<td>Tel: +65 623 65174 Email: <a href="mailto:info@consul-latvia.sg">info@consul-latvia.sg</a></td>
</tr>
<tr>
<td>Lithuania</td>
<td>The attending embassy for Singapore is the Lithuanian embassy in Japan</td>
<td><a href="http://jp.mfa.lt">http://jp.mfa.lt</a></td>
<td>Tel: +81 3 3408 5092 Email: <a href="mailto:amb.jp@urm.lt">amb.jp@urm.lt</a></td>
</tr>
<tr>
<td>EU Member State</td>
<td>Address</td>
<td>Website</td>
<td>Contact Information</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------</td>
<td>---------</td>
<td>---------------------</td>
</tr>
</tbody>
</table>
| **Luxembourg**  | The attending embassy for Singapore is the Luxembourg embassy in Bangkok. Q House Lumpini 17th Floor, 1 South Sathorn Road, Tungmahamek, Sathorn, Bangkok 10120 | http://bangkok.mae.lu/en | Tel: (+66) 2 677 7360  
Email: bangkok.amb@mae.etat.lu |
| **Malta**       | (1) Consular officer  
Capt ASHOK K. BATURA, Hon. Consul  
610 Anson Road 15/02, International Plaza, Singapore 079903 | | Tel: 0065 6324 2060  
email: maltaconsul.singapore@gov.mt |
| **Netherlands** | 541 Orchard Road 13-01, Liat Towers. 238881 Singapore | http://singapore.nlembassy.org/ | Tel: (+65) 67 37 11 55  
Email: sin-ez@minbuza.nl |
| **Poland**      | 435 Orchard Road 17-02/03 Wisma Atria. Singapore 238877 | http://www.singapur.msz.gov.pl/en/root | Tel: +65 62359478 |
| **Portugal**    | 143, Cecil Street, GB Building #06-02 Singapore 069542 | | Tel: +65 6224 2256  
Email: singapura@mne.pt |
| **Romania**     | 1 Claymore Drive, Orchard Towers #08-10, Singapore 229594 | http://singapore.mae.ro/en | Tel: +65 6735 5023 |
| **Slovakia**    | The attending embassy for Slovakia is the Slovakian embassy in Jakarta  
JI. Prof. Mohammad Yamin SH, 29, 103 10, Jakarta, Indonesia | http://www.mzv.sk/web/jakarta | Tel: +62 213101068  
Email: emb.jakarta@mzv.sk |
### EU Member States

<table>
<thead>
<tr>
<th>EU Member State</th>
<th>Address</th>
<th>Website</th>
<th>Contact information</th>
</tr>
</thead>
</table>
Email: gerald.lim@sloveniaconsul.com |
Email: emb.singapur@maec.es |
Email: ambassaden.singapore@gov.se |
| United Kingdom  | 100 Tanglin Road  
Email: enquiries.singapore@fco.gov.uk |

*Table 7 EU Member States*

### 7.2 Other Organizations and Service Providers

Other service providers that offer business facilitation and assistance for companies are often provided on a fee paying basis. These service providers often work with, or are part of, the commercial sections of their respective governments and embassies.

<table>
<thead>
<tr>
<th>Service provider</th>
<th>Website</th>
<th>Address</th>
<th>Contact</th>
</tr>
</thead>
</table>
| Austrian Economic| [https://www.wko.at/Content.Node](https://www.wko.at/Content.Node) | Wiedner Hauptstraße 63 1045 | Tel: +43 5 90 900  
Fax: +43 5 90 |
<table>
<thead>
<tr>
<th>Service provider</th>
<th>Website</th>
<th>Address</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chambers</td>
<td><a href="http://wir/Austrian_Economic_Chambers_Home.html">wir/Austrian_Economic_Chambers_Home.html</a></td>
<td>Vienna, Austria</td>
<td>900 250 Email: <a href="mailto:office@wko.at">office@wko.at</a></td>
</tr>
<tr>
<td>Oesterreichisch e Kontrollbank Aktiengesellsch aft (OeKB)</td>
<td><a href="http://www.oekb.at/">http://www.oekb.at/</a></td>
<td>Oesterreichische Kontrollbank Aktiengesellschaft Am Hof 4; Strauchgasse 3 1011 Vienna, Austria</td>
<td>Tel: +43 1 53127-2859 Fax: +43 1 53127-5698 Email: <a href="mailto:corporate.communications@oekb.at">corporate.communications@oekb.at</a></td>
</tr>
<tr>
<td>Brussels Invest &amp; Export</td>
<td><a href="http://invest-export.brussels/web/export/welcome">http://invest-export.brussels/web/export/welcome</a></td>
<td>Brussels Invest &amp; Export Foreign trade and foreign investments service of the Brussels Regional Public Service Avenue Louise 500/4 1050 Brussels, Belgium</td>
<td>Tel: +32 (0)2 800 40 00 Fax: +32 (0)2 800 40 01 Email: <a href="mailto:info@brusselsinvestexport.be">info@brusselsinvestexport.be</a></td>
</tr>
<tr>
<td>Delcredere</td>
<td><a href="http://www.delcredereducroire.be/en/about-us/mission/">http://www.delcredereducroire.be/en/about-us/mission/</a></td>
<td>Delcredere - Ducroire Rue Montoyerstraat 3, 1000 Brussels, Belgium</td>
<td>Tel: +32 (0)2 788 88 00 Fax: +32 (0)2 788 88 10 Email: <a href="mailto:businessdevelopment@credendogroup.com">businessdevelopment@credendogroup.com</a></td>
</tr>
<tr>
<td>Wallonia</td>
<td><a href="http://www.awex.be/de-DE/Pages/Home.aspx">http://www.awex.be/de-DE/Pages/Home.aspx</a></td>
<td>AWEX-Regionalbüro Eupen Hütte, 79/20 4700 Eupen Belgium</td>
<td>Tel: 32-87-56.82.19 Fax: 32-87-77.33.50 Email: <a href="mailto:mail@awex.be">mail@awex.be</a></td>
</tr>
<tr>
<td>Belgium Corporation for International Investment</td>
<td><a href="http://www.bmi-sbi.be/en/produits.html">http://www.bmi-sbi.be/en/produits.html</a></td>
<td>SBI Avenue de Tervueren 168, bte 9 B-1150 Brussels, Belgium</td>
<td>Tel: +32 2 776 01 00 Fax: +32 2 770 66 38 Email: <a href="mailto:info@bmi-sbi.be">info@bmi-sbi.be</a></td>
</tr>
<tr>
<td>Service provider</td>
<td>Website</td>
<td>Address</td>
<td>Contact</td>
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<td>-------------------------------------------------------------------------</td>
<td>----------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Bulgarian Chamber of Commerce and Industry</strong></td>
<td><a href="http://www.bcci.bg/bcci-services.html">http://www.bcci.bg/bcci-services.html</a></td>
<td>9 Iskar Str., 1058, Sofia, Bulgaria</td>
<td>Tel: +359 2 8117 400, 987 26 31 Fax: +359 2 987 32 09 Email: <a href="mailto:bcci@bcci.bg">bcci@bcci.bg</a></td>
</tr>
<tr>
<td><strong>The National Customs Agency</strong></td>
<td><a href="http://customs.bg/en/page/150">http://customs.bg/en/page/150</a></td>
<td>National Customs Agency Sofia 1202 Bulgaria</td>
<td>Tel: +359 2 9859 4210 Email: <a href="mailto:pr@customs.bg">pr@customs.bg</a></td>
</tr>
<tr>
<td><strong>OEB: Cyprus Employers and Industrialists Federation</strong></td>
<td><a href="http://en.oeb.org.cy/">http://en.oeb.org.cy/</a></td>
<td>2 Acropoleos Ave. &amp; Glafkou Str, P.O Box 21657 1511 Nicosia Cyprus</td>
<td>Tel: +357 22 66 51 02 Fax: +357 22 66 94 59 Email: <a href="mailto:info@oeb.org.cy">info@oeb.org.cy</a></td>
</tr>
<tr>
<td><strong>Germany Trade &amp; Invest</strong></td>
<td><a href="https://www.gtai.de/GTAI/Navigation/EN/Trade/Service/information-service.html">https://www.gtai.de/GTAI/Navigation/EN/Trade/Service/information-service.html</a></td>
<td>Villemombler Straße 76 53123 Bonn, Germany</td>
<td>Tel: +49 228 249 93-0 Fax: +49 228 249 93-212</td>
</tr>
<tr>
<td><strong>The Trade Council</strong></td>
<td><a href="http://kina.um.dk/en/the-trade-council/products-and-services/">http://kina.um.dk/en/the-trade-council/products-and-services/</a></td>
<td>Ministry of Foreign Affairs of Denmark Asiatisk Plads 2 DK-1448 Copenhagen, Denmark</td>
<td>Tel: +45 33 92 05 00 Email: <a href="mailto:eksportraadet@um.dk">eksportraadet@um.dk</a></td>
</tr>
<tr>
<td>Service provider</td>
<td>Website</td>
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<td>Contact</td>
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<tr>
<td>The Danish Business Authority</td>
<td><a href="https://danishbusinessauthority.dk/ue-and-international">https://danishbusinessauthority.dk/ue-and-international</a></td>
<td>Langelinie Allé 17 2100 Copenhagen, Denmark</td>
<td>Tel: +4535291000 Email: <a href="mailto:erst@erst.dk">erst@erst.dk</a></td>
</tr>
<tr>
<td>Enterprise Greece</td>
<td><a href="http://www.investingreece.gov.gr/">http://www.investingreece.gov.gr/</a></td>
<td>109 Vasilisis Sophias Avenue 115 21 Athens, Greece</td>
<td>Tel: +30 210 335 5700 Fax: +30 210 324 2079 Email: <a href="mailto:info@enterprisegreece.gov.gr">info@enterprisegreece.gov.gr</a></td>
</tr>
<tr>
<td>Nordic Project Fund</td>
<td><a href="http://www.nopef.com/pages/eng/nopef/about-nopef.php">http://www.nopef.com/pages/eng/nopef/about-nopef.php</a></td>
<td>Nordic Environment Finance Corporation NEFCO, PB 241, FI-00171 Helsingfors, Finland</td>
<td>Tel: +358 (0)10 618 003 Email: <a href="mailto:info@nopef.com">info@nopef.com</a></td>
</tr>
<tr>
<td>Viexpo</td>
<td><a href="http://www.viexpo.fi/services/">http://www.viexpo.fi/services/</a></td>
<td>Runeberginkatu 11 FI-68600 Pietarsaari, Finland</td>
<td>Tel: +358 6 781 6440 Email: <a href="mailto:viexpo@viexpo.fi">viexpo@viexpo.fi</a></td>
</tr>
<tr>
<td>Service provider</td>
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<td>Contact</td>
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</tr>
<tr>
<td><strong>Budapest Chamber of Commerce and Industry (BCCI)</strong></td>
<td><a href="http://www.bkik.hu/en#">http://www.bkik.hu/en#</a></td>
<td>46 avenue de la Grande Armée, CS 50071, 75 858 Paris Cedex 17, France</td>
<td>Tel: +33 01 4069 3760 Fax: +33 01 4069 3783 Email: <a href="mailto:infos@uccife.org">infos@uccife.org</a></td>
</tr>
<tr>
<td><strong>Hungarian Foundation for Enterprise Promotion</strong></td>
<td><a href="http://www.mva.hu/english.php">http://www.mva.hu/english.php</a></td>
<td>Krisztina krt 99, 1016 Budapest, Hungary</td>
<td>Tel: +36 (1) 488 2000 Fax: +36 (1) 488 2108 Email: <a href="mailto:ugyfelszolgalat@bkik.hu">ugyfelszolgalat@bkik.hu</a></td>
</tr>
<tr>
<td><strong>Enterprise Ireland</strong></td>
<td><a href="https://www.enterprise-ireland.com/en/Export-Assistance/">https://www.enterprise-ireland.com/en/Export-Assistance/</a></td>
<td>Szépvölgyi út 135., Budapest, III. 1277 Budapest 23, Pf: 4, Hungary</td>
<td>Tel: +36 1 883 0800 Fax: +36 1 883 0841 Email: <a href="mailto:info@mva.hu">info@mva.hu</a></td>
</tr>
<tr>
<td><strong>Bord Bia (Irish Food Board)</strong></td>
<td><a href="http://www.bordbia.ie/">www.bordbia.ie/</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Italian Trade Agency</strong></td>
<td><a href="http://www.ice.gov.it/home.htm">http://www.ice.gov.it/home.htm</a></td>
<td>Via Liszt 21, 00144 Roma, Italy</td>
<td>Tel: +39 06 5992 9439 Email: <a href="mailto:ice@pec.ice.it">ice@pec.ice.it</a></td>
</tr>
<tr>
<td><strong>Regione Emilia Romagne</strong></td>
<td><a href="http://imprese.regione.emilia-romagna.it/">http://imprese.regione.emilia-romagna.it/</a></td>
<td>Viale Aldo Moro 44, 40127 Bologna, Italy</td>
<td>Tel: +39 051 5276309 Email: <a href="mailto:sportelloestero@regione.emilia-romagna.it">sportelloestero@regione.emilia-romagna.it</a></td>
</tr>
<tr>
<td><strong>Kaunas Chamber of Commerce, Industry and</strong></td>
<td><a href="http://chamber.lt/EN/Home/Services">http://chamber.lt/EN/Home/Services</a></td>
<td>Kaunas Chamber of Commerce K. Donelaicio str. 8, 44213</td>
<td>Tel: +370 37 229212 Email: <a href="mailto:chamber@chamber.lt">chamber@chamber.lt</a></td>
</tr>
<tr>
<td>Service provider</td>
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<td>Address</td>
<td>Contact</td>
</tr>
<tr>
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<td>----------------------------------------------</td>
<td>----------------------------------------------</td>
</tr>
<tr>
<td>Crafts</td>
<td></td>
<td>Kaunas, Lithuania</td>
<td></td>
</tr>
<tr>
<td>Luxinnovation</td>
<td><a href="http://en.luxinnovation.lu/Services">http://en.luxinnovation.lu/Services</a></td>
<td>7, rue Alcide de Gasperi L-1615 Luxembourg</td>
<td>Tel: +352 43 6263 Ext.1 Fax: +352 43 8120 Email: <a href="mailto:info@luxinnovation.lu">info@luxinnovation.lu</a></td>
</tr>
<tr>
<td>Investment and Development Agency of Latvia</td>
<td><a href="http://www.liaa.gov.lv/en">http://www.liaa.gov.lv/en</a></td>
<td>2 Perses Street, Riga, LV-1442, Latvia</td>
<td>Tel: +371 67039400 Fax: +371 67039401 Email: <a href="mailto:liaa@liaa.gov.lv">liaa@liaa.gov.lv</a></td>
</tr>
<tr>
<td>Latvian Guarantee Agency</td>
<td><a href="http://www.lga.lv/index.php?id=1&amp;L=1">http://www.lga.lv/index.php?id=1&amp;L=1</a></td>
<td>Zigfrīda Annas Meierovica bulvaris 14, Rīga, 1050, Latvia</td>
<td>Tel: +371 67216081 Fax: +371 67359374 Email: <a href="mailto:lga@lga.lv">lga@lga.lv</a></td>
</tr>
<tr>
<td>Chamber of Commerce Amsterdam</td>
<td><a href="http://www.kvk.nl/english/international">http://www.kvk.nl/english/international</a></td>
<td>De Ruyterkade 51013, Amsterdam, The Netherlands</td>
<td>Tel: +31 20 531 40 00 Email: <a href="mailto:info@amsterdam.kvk.nl">info@amsterdam.kvk.nl</a></td>
</tr>
<tr>
<td>Netherlands Enterprise Agency (RVO) / Agentschap NL (AGNL)</td>
<td><a href="http://english.rvo.nl/home/about-rvonl/what-is-rvonl">http://english.rvo.nl/home/about-rvonl/what-is-rvonl</a></td>
<td>RVO.nl in The Hague (Centre Court) Prinses Beatrixlaan 2 2595 AL The Hague, The Netherlands Postal address: P.O. Box 93144 2509 AC The Hague, The Netherlands</td>
<td>Tel: +31 88 602 50 00 Fax: +31 88 602 90 23 Contact Form: <a href="http://english.rvo.nl/home/about-rvonl/what-is-rvonl/contact-form">http://english.rvo.nl/home/about-rvonl/what-is-rvonl/contact-form</a></td>
</tr>
<tr>
<td>Polish Agency for</td>
<td><a href="http://en.parp.gov.pl/">http://en.parp.gov.pl/</a></td>
<td>Polska Agencja Rozwoju</td>
<td>Tel: +22 432 80 80, 432 71 25</td>
</tr>
</tbody>
</table>
### Service providers

<table>
<thead>
<tr>
<th>Service provider</th>
<th>Website</th>
<th>Address</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Development</td>
<td></td>
<td>Przedsiębiorczości ul. Paoska 81/83, 00-834 Warsaw, Poland</td>
<td>Fax: +22 432 86 20 Email: <a href="mailto:biuro@parp.gov.pl">biuro@parp.gov.pl</a></td>
</tr>
<tr>
<td>AICEP Portugal Global</td>
<td><a href="http://www.portugalglobal.pt/EN/Pag_es/Index.aspx">http://www.portugalglobal.pt/EN/Pag_es/Index.aspx</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Innovationsbroker AB</td>
<td><a href="http://www.almi.se/English/">http://www.almi.se/English/</a></td>
<td>N/a</td>
<td>Tel: +46 0771 55 85 00 Email: <a href="mailto:info.lanadm@almi.se">info.lanadm@almi.se</a></td>
</tr>
<tr>
<td>SARIO (Slovak Investment and Trade Development Agency); and Slovak Chamber of Commerce and Industry</td>
<td><a href="http://www.sario.sk/en">http://www.sario.sk/en</a></td>
<td>Slovak Investment and Trade Development Agency, Trnavská cesta 100 821 01 Bratislava, Slovak Republic</td>
<td>Tel: +421 2 58 260 100, 101 Fax: +421 2 58 260 109 Email: <a href="mailto:sario@sario.sk">sario@sario.sk</a></td>
</tr>
<tr>
<td>United Kingdom Trade and Investment (UKTI)</td>
<td><a href="https://www.gov.uk/government/organisations/uk-trade-investment">https://www.gov.uk/government/organisations/uk-trade-investment</a></td>
<td>UKTI head office (General Enquiries) 1 Victoria Street London, SW1H 0ET, UK</td>
<td>Tel: +44 020 7215 5000 Email: <a href="mailto:enquiries@ukti.gsi.gov.uk">enquiries@ukti.gsi.gov.uk</a></td>
</tr>
</tbody>
</table>

Table 8 Service providers

### 7.3 EU and Singaporean Chambers, Bodies and Associations

<table>
<thead>
<tr>
<th>Institution</th>
<th>Website</th>
<th>Address</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>EuroCham Singapore</td>
<td><a href="http://eurocham.org.sg/">http://eurocham.org.sg/</a></td>
<td>1 Phillip Street, #12-01 Royal One Phillip. Singapore 048692</td>
<td>Tel: +65 6836 6681 email: <a href="mailto:info@eurocham.org.sg">info@eurocham.org.sg</a></td>
</tr>
<tr>
<td>Euro-ASEAN business council</td>
<td><a href="http://eu-asean.eu/">http://eu-asean.eu/</a></td>
<td>1 Phillip St #12-01Royal One Phillip Singapore 048692</td>
<td>Tel: +65 6836 6681 Email: <a href="mailto:info@eu-asean.eu">info@eu-asean.eu</a></td>
</tr>
</tbody>
</table>
The EU-ASIA business links

**Italian Chamber of Commerce in Singapore**

http://www.italchamber.org.sg

70 Anson Road I #22-02 Hub Synergy Point I Singapore 079905

Tel: +65 6223 0356
Email: singapore@italchamber.org.sg

**French Chamber in Singapore**

http://www.fccsingapore.com/

541 Orchard Road, #09-01 Liat Towers, Singapore 238881

Tel: +65 6933 1350
Contact form: http://www.fccsingapore.com/about-us/contact

**Singaporean-German Chamber of Industry and Commerce**


25 International Business Park #03-105 German Centre. Singapore 609916.

Tel : +65 6433 5330
Website: www.sgc.org.sg

Table 9 Institution

### 7.4 Calendar of Trade Events and Exhibitions

Attending trade events and exhibitions can help promote your product in Singapore as well as forge relationships with industry figures and useful business contacts.

<table>
<thead>
<tr>
<th>Event</th>
<th>Focus</th>
<th>Date</th>
<th>Recurrence</th>
<th>City</th>
<th>Website</th>
<th>Venue</th>
<th>Organizer details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific Food Expo</td>
<td>Food and beverage worldwide cuisine</td>
<td>18 – 21 November 2016</td>
<td>Annual</td>
<td>Singapore</td>
<td><a href="http://www.asiapacificfoodexpo.org.sg/">http://www.asiapacificfoodexpo.org.sg/</a></td>
<td>Singapore - Expo</td>
<td>Singapore Food Manufacturers Association (SFMA) Email: <a href="mailto:enquiries@sfma.org.sg">enquiries@sfma.org.sg</a> Tel: +65 6221 2438</td>
</tr>
<tr>
<td>Event</td>
<td>Category</td>
<td>Date</td>
<td>Frequency</td>
<td>Location</td>
<td>Organizer</td>
<td></td>
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<td>------------------------------------------------------------------</td>
<td></td>
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</tr>
<tr>
<td>ICY Expo</td>
<td>Food and beverage machinery and equipment</td>
<td>2 – 4 March 2017</td>
<td></td>
<td>Singapore</td>
<td>Marina Bay Sands</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Conference and Exhibition Management Services Pte Limited</td>
<td></td>
<td></td>
</tr>
<tr>
<td>World Food Fair</td>
<td>Food and beverage industry for global audiences</td>
<td>16 – 19 March 2017</td>
<td>Annual</td>
<td>Singapore</td>
<td>Singapore EXPO Convention and Exhibition Centre</td>
<td></td>
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<tr>
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<td></td>
<td></td>
<td>Exhibits Inc Pte Ltd</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Email: <a href="mailto:sales@exhibitsinc.com.sg">sales@exhibitsinc.com.sg</a></td>
<td></td>
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</tr>
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<td>Tel: + (65) 6747 4620</td>
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*Table 10 Event calendar*
ANNEX I - GI PRODUCTS REGISTERED IN SINGAPORE

Singapore and the European Union concluded a Free Trade Agreement in 2014, which has a comprehensive paragraph on GIs. The FTA obliges Singapore to protect a list of EU GIs once they will have passed the new SGP administrative procedure.

Below is the list of GIs that shall be registered by Singapore as GIs once the FTA has been ratified by the European Union legislative institutions.

Geographical Indications of the Union

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<th>Member State</th>
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<tbody>
<tr>
<td>1 Cyprus</td>
<td>Κουμανδαρία /Commandaria</td>
<td>Wine</td>
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<tr>
<td>2 Cyprus</td>
<td>Ζιβανία/Τζιβανία/Ζιβάνα/Zivania</td>
<td>Spirit</td>
</tr>
<tr>
<td>3 Czech Republic</td>
<td>České pivo</td>
<td>Beers</td>
</tr>
<tr>
<td>4 Czech Republic</td>
<td>Budějovické pivo</td>
<td>Beers</td>
</tr>
<tr>
<td>5 Czech Republic</td>
<td>Budějovický měšt'anský var</td>
<td>Beers</td>
</tr>
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<td>6 Czech Republic</td>
<td>Českobudějovické pivo</td>
<td>Beers</td>
</tr>
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<td>7 Czech Republic</td>
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<td>Korn / Kornbrand</td>
<td>Spirit</td>
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<tr>
<td>14 Germany</td>
<td>Bayerisches Bier</td>
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<td>15 Germany</td>
<td>Münchener Bier</td>
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<td>18 Germany</td>
<td>Schwarzwälder Schinken</td>
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<td>19 Germany</td>
<td>Aachener Printen</td>
<td>Bread, pastry, cakes, confectionery, biscuits and other</td>
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\(^1\) Product of Germany, Austria, Belgium (German-speaking Community).
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<td>Germany</td>
<td>Bremer Klaben</td>
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<td>Irish Whiskey / Uisce Beatha Eireannach / Irish Whisky</td>
<td>Spirit</td>
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<tr>
<td>Ireland</td>
<td>Irish cream</td>
<td>Spirit</td>
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<td>Greece</td>
<td>Ρετσίνα Αττικής (Retsina of Attiki)</td>
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<tr>
<td>Greece</td>
<td>Oίζο/Οuzo(^3)</td>
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<tr>
<td>Greece</td>
<td>Ελιά Καλαμάτας (Elia Kalamatas)</td>
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\(^3\) Product of Greece or Cyprus.
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## Tastes of Europe Singapore – Market Entry Handbook

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<td>Cheese</td>
</tr>
<tr>
<td>128</td>
<td>Italy</td>
<td>Fontina</td>
<td>Cheese</td>
</tr>
<tr>
<td>129</td>
<td>Italy</td>
<td>Gorgonzola</td>
<td>Cheese</td>
</tr>
<tr>
<td></td>
<td>Member State</td>
<td>Geographical Indication</td>
<td>Product Description or Product Class</td>
</tr>
<tr>
<td>---</td>
<td>--------------</td>
<td>-----------------------------------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>130</td>
<td>Italy</td>
<td>Grana Padano</td>
<td>Cheese</td>
</tr>
<tr>
<td>131</td>
<td>Italy</td>
<td>Mozzarella di Bufala Campana</td>
<td>Cheese</td>
</tr>
<tr>
<td>132</td>
<td>Italy</td>
<td>Parmigiano Reggiano</td>
<td>Cheese</td>
</tr>
<tr>
<td>133</td>
<td>Italy</td>
<td>Pecorino Romano</td>
<td>Cheese</td>
</tr>
<tr>
<td>134</td>
<td>Italy</td>
<td>Pecorino Sardo</td>
<td>Cheese</td>
</tr>
<tr>
<td>135</td>
<td>Italy</td>
<td>Pecorino Toscano</td>
<td>Cheese</td>
</tr>
<tr>
<td>136</td>
<td>Italy</td>
<td>Arancia Rossa di Sicilia</td>
<td>Fruit, vegetables and cereals fresh or processed</td>
</tr>
<tr>
<td>137</td>
<td>Italy</td>
<td>Cappero di Pantelleria</td>
<td>Fruit, vegetables and cereals fresh or processed</td>
</tr>
<tr>
<td>138</td>
<td>Italy</td>
<td>Kiwi Latina</td>
<td>Fruit, vegetables and cereals fresh or processed</td>
</tr>
<tr>
<td>139</td>
<td>Italy</td>
<td>Lenticchia di Castelluccio di Norcia</td>
<td>Fruit, vegetables and cereals fresh or processed</td>
</tr>
<tr>
<td>140</td>
<td>Italy</td>
<td>Mela Alto Adige / Südtiroler apfel</td>
<td>Fruit, vegetables and cereals fresh or processed</td>
</tr>
<tr>
<td>141</td>
<td>Italy</td>
<td>Pesca e nettarina di Romagna</td>
<td>Fruit, vegetables and cereals fresh or processed</td>
</tr>
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<td>142</td>
<td>Italy</td>
<td>Pomodoro di Pachino</td>
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<td>Member State</td>
<td>Geographical Indication</td>
<td>Product Description or Product Class</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------</td>
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<td></td>
</tr>
<tr>
<td>143</td>
<td>Italy Grappa</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>144</td>
<td>Italy Chianti</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>145</td>
<td>Italy Marsala</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>146</td>
<td>Italy Asti</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>147</td>
<td>Italy Barbaresco</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>148</td>
<td>Italy Bardolino (superiore)</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>149</td>
<td>Italy Barolo</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>150</td>
<td>Italy Brachetto d'Acqui</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>151</td>
<td>Italy Brunello di Montalciano</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>152</td>
<td>Italy Vino nobile di Montepulciano</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>153</td>
<td>Italy Bolgheri Sassicaia</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>154</td>
<td>Italy Dolcetto d'Alba</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>155</td>
<td>Italy Franciacorta</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Member State</td>
<td>Geographical Indication</td>
<td>Product Description or Product Class</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------</td>
<td>-------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Lambrusco di Sorbara</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Lambrusco Grasparossa di Castelvetro</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Montepulciano d’Abruzzo</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Soave</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Campania</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Sicilia</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Toscan/a</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Veneto</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Conegliano Valdobbiadene - Prosecco</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td>Tokaj</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td>Törkölypálinka</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td>Pálinka</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td>Szegedi télisalámi / Szegedi szalámi</td>
<td>Meat products (cooked, salted, smoked, etc.)</td>
<td></td>
</tr>
<tr>
<td>Member State</td>
<td>Geographical Indication</td>
<td>Product Description or Product Class</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
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<td></td>
</tr>
<tr>
<td>Austria</td>
<td>Jägertee / Jagertee / Jagatee</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td>Inländerrum</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td>Tiroler Speck</td>
<td>Meat products (cooked, salted, smoked, etc.) - Hams</td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td>Steirischer Kren</td>
<td>Fruit, vegetables and cereals fresh or processed</td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>Polska Wódka/Polish Vodka</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>Wódka ziołowa z Niziny Północnopodlaskiej aromatyzowana ekstraktem z trawy żubrowej / Herbal vodka from the North Podlasie Lowland aromatised with an extract of bison grass</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>Polish Cherry</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>Queijo S. Jorge</td>
<td>Cheese</td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>Madeira, Madère or Madera</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>Porto, Port or Oporto</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>Douro</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Member State</td>
<td>Geographical Indication</td>
<td>Product Description or Product Class</td>
<td></td>
</tr>
<tr>
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<td>----------------------------------</td>
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<td></td>
</tr>
<tr>
<td>180 Portugal</td>
<td>Dão</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>181 Portugal</td>
<td>Bairrada</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>182 Portugal</td>
<td>Vinho Verde</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>183 Portugal</td>
<td>Alentejo</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>184 Romania</td>
<td>Dealu Mare</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>185 Romania</td>
<td>Murfatlar</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>186 Romania</td>
<td>Cotnari</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>187 Romania</td>
<td>Coteşti</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>188 Romania</td>
<td>Panciu</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>189 Romania</td>
<td>Recaş</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>190 Romania</td>
<td>Odobeşti</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>191 Romania</td>
<td>Târnave</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>192 Slovakia</td>
<td>Vinohradnicka oblast’ Tokaj</td>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Member State</td>
<td>Geographical Indication</td>
<td>Product Description or Product Class</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------</td>
<td>--------------------------------------</td>
<td></td>
</tr>
<tr>
<td>193 Finland</td>
<td>Suomalainen Vodka / Finsk Vodka / Vodka of Finland</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>194 Finland</td>
<td>Finnish berry liqueur / Finnish fruit liqueur</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>195 Sweden</td>
<td>Svensk Vodka / Swedish Vodka</td>
<td>Spirit</td>
<td></td>
</tr>
<tr>
<td>196 United Kingdom</td>
<td>Scotch Whisky</td>
<td>Spirit</td>
<td></td>
</tr>
</tbody>
</table>
# ANNEX II: DATABASE OF PROFESSIONAL BUYERS

## Buyers:

### Major retailers

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

*Table 11 Major retailers*

### Convenience stores

<table>
<thead>
<tr>
<th>Retailer &amp; Market Type, Ownership, % Sales (2014), No. of Outlets, Locations, Type of Purchasing Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-Eleven (convenience), HK (DFI), 0.6, 502 Island-wide, Importer/Agent/Distributor</td>
</tr>
<tr>
<td>Cheers (convenience), Local (NTUC FairPrice), 0.2, 139 Island-wide, Importer/Agent/Distributor</td>
</tr>
<tr>
<td>Choices (gas mart), Local (Singapore Petroleum), 0.2, 40 Island wide, Importer/Agent/Distributor</td>
</tr>
<tr>
<td>Star Mart (gas mart), Local (Caltex), 0.2, 27 Island wide, Importer/Agent/Distributor</td>
</tr>
<tr>
<td>FairPrice, Local, 0.2, 23 Island, Importer/Agent/Distributor</td>
</tr>
</tbody>
</table>

---

366 Source: Gain Report: Singapore – USDA Foreign Agricultural Service no: SN5005

367 Ibid.
<table>
<thead>
<tr>
<th>Retailer &amp; Market Type</th>
<th>Ownership</th>
<th>% Sales (2014)</th>
<th>No. of Outlets</th>
<th>Locations</th>
<th>Type of Purchasing Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Xpress (gas mart)</td>
<td>NTUC</td>
<td></td>
<td></td>
<td>wide</td>
<td></td>
</tr>
<tr>
<td>i-Econ</td>
<td>Local</td>
<td>0.9%</td>
<td>85</td>
<td>Island</td>
<td>Strategic Partner</td>
</tr>
<tr>
<td>(local retail franchise</td>
<td>Hanwell</td>
<td></td>
<td></td>
<td>wide</td>
<td>Importer/Wholesaler/Agent</td>
</tr>
<tr>
<td></td>
<td>Holdings</td>
<td></td>
<td></td>
<td>(mostly in</td>
<td>heartlands)</td>
</tr>
</tbody>
</table>

Table 12 Convenience stores

Journalists:

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiona Chan</td>
<td>Managing editor</td>
<td>e-mail: <a href="mailto:fiochan@sph.com.sg">fiochan@sph.com.sg</a>, office phone: (65) 6319 5151</td>
</tr>
<tr>
<td>Tan Hsueh Yun</td>
<td>Life and Sunday life section editor</td>
<td>e-mail: <a href="mailto:hsueh@sph.com.sg">hsueh@sph.com.sg</a>, office Phone: (65) 6319 5366</td>
</tr>
<tr>
<td>Chua Mui Hoong</td>
<td>opinion corner editor</td>
<td>e-mail: <a href="mailto:muihoong@sph.com.sg">muihoong@sph.com.sg</a>, office phone: (65) 6319 5301</td>
</tr>
<tr>
<td>Elisabeth Gwee</td>
<td>Urban editor</td>
<td>e-mail: <a href="mailto:lisa@sph.com.sg">lisa@sph.com.sg</a>, office phone: (65) 6319 5413</td>
</tr>
<tr>
<td>Marc Lim</td>
<td>News Editor</td>
<td>e-mail: <a href="mailto:marclim@sph.com.sg">marclim@sph.com.sg</a>, office phone: (65) 6319 5498</td>
</tr>
</tbody>
</table>

The Straits Times/ The Sunday Times

The Business Times

Alvin Tay          | Editor of the Business Times | e-mail: alvintay@sph.com.sg, office phone: (65) 6319 5617 |
Vikram Khanna      | Associate Editor            | email: vikram@sph.com.sg, office phone: (65) 6319 5627 |

The New Paper

Dominic Nathan     | The Editor of the New Paper | e-mail: npops@sph.com.sg, office phone (65) 6319 5223    |
Natalie Soh        | The News Editor             | e-mail: natalie@sph.com.sg, office phone: (65) 6319 5568 |
Ken Jalleh Junior  | The Creative Director       | e-mail: kenjr@sph.com.sg, office phone: (65) 6319 2140   |

Table!
### Tastes of Europe Singapore – Market Entry Handbook

**Table 13 Journalists**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goh Sin Teck (吳新迪)</td>
<td>Editor</td>
<td>e-mail: <a href="mailto:gohst@sph.com.sg">gohst@sph.com.sg</a>, office phone (65) 6319 1367</td>
</tr>
<tr>
<td>Quek Lee Kiang (郭丽娟)</td>
<td>Business editor</td>
<td>e-mail: <a href="mailto:queklk@sph.com.sg">queklk@sph.com.sg</a>, office phone: (65) 6319 2296</td>
</tr>
</tbody>
</table>

**Channel NewsAsia** (tele media)

**Lance Alexander**

He currently co-hosts Channel NewsAsia’s daily breakfast programme, First Look Asia.

LinkedIn: [https://sg.linkedin.com/in/lance-alexander-5956389b](https://sg.linkedin.com/in/lance-alexander-5956389b), on Twitter [https://twitter.com/lancecna](https://twitter.com/lancecna)

**Adam Bakhtiar**

As Presenter of the International Business Desk, Adam fronts the channel’s newest dedicated business show, Asia Business First.

LinkedIn: [https://www.linkedin.com/in/adambakhtiar-371004102](https://www.linkedin.com/in/adambakhtiar-371004102), on Twitter: [https://twitter.com/adambakhtiarcna](https://twitter.com/adambakhtiarcna)

**Chloe Cho**

Chloe Cho is Presenter and Executive Producer in Channel NewsAsia’s Current Affairs department.

LinkedIn: [https://www.linkedin.com/in/chloecho](https://www.linkedin.com/in/chloecho) on Twitter: [https://twitter.com/chloechotv?lang=en](https://twitter.com/chloechotv?lang=en)

**Glenda Chong**

Glenda Chong currently anchors Primetime World and is the co-host of Primetime Asia.

LinkedIn: [https://www.linkedin.com/in/glenda-chong-74a38573](https://www.linkedin.com/in/glenda-chong-74a38573) on Twitter: [https://twitter.com/glendachong7?lang=en](https://twitter.com/glendachong7?lang=en)

**Bloggers:**

<table>
<thead>
<tr>
<th>Blogger (Name of the Blog)</th>
<th>Blog Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharon Lam (Delishar)</td>
<td>delishar.com/</td>
</tr>
<tr>
<td>Dawn Chan (Berry Gin)</td>
<td><a href="http://berrygin.blogspot.sg/">http://berrygin.blogspot.sg/</a></td>
</tr>
<tr>
<td>Joyce Ang (Eat What Tonight) -</td>
<td>eatwhattonight.com/</td>
</tr>
</tbody>
</table>
Blogger (Name of the Blog) | Blog Address
---|---
Geri Tan (Spring Tomorrow) | springtomorrow.com
Melody Ju (Miss Neverfull) | missneverfull.com/
Dariel Quek & Kenneth Lee (Yummy Food Book) | yummyfoodbook.com
Melissa (Hungry Bird) | hungrybird.sg
Veron (Sparklette) | sparklette.net/
Cheng Huann & Kelvyn Choo (Foodprints SG) | foodprints-sg.com
Julia Khoo (Aroma Cookery) | aromacookery.com/
Crystal Wee (Crystal Wee) | crystalwee.com
Annie Mok (Annielicious) | annieliciousfood.blogspot.sg/
Cynthia Lim (The Baking Biatch) | thebakingbiatch.com
Jeremy Holden (Such A Fatty) | suchafatty.com
The Ordinary Patrons (Ordinary Patrons) | ordina_rypatrons.com

Table 14 Bloggers

VIP Cooks:

Chef Justin Queck

His specialty is in Franco-Asian cuisine. He is Singapore's most internationally known chef and the first Asian chef invited to participate in Lufthansa's Star Chefs program. In 2010 he opened the "Sky On 57" at Marina Bay Sands, Singapore. The restaurant showcases an array of Franco-Asian cuisine, and offers a view of the Singapore skyline.

Awards:

(1) In 2001, Quek was awarded the title of Best Chef of the Year at the inaugural World Gourmet Summit (WGS) Awards.

(2) In 2003 and 2004, Quek won the title of San Pellegrino Chef of the Year.

(3) In 2004, Quek received the Lifetime Achievement Award at the 8th Annual New World Food and Wine Festival.
(4) In 2005, Quek received the at-sunrice GlobalChef Award.

(5) In 2009, Quek received World Gourmet Summit Award of Excellence Hall of Fame Best chef.


**Chef Eric Teo:**

Chef Eric Teo brings nearly two decades of culinary experience to Mandarin Oriental, Singapore. Starting as an apprentice, it took him only ten years to rise up the ranks and assume position of executive chef at the Jerudong Park Polo Club (formally known as Royal Brunei Polo Club). Chef Teo was part of the opening team at the Grand Cophthorne Waterfront Hotel Singapore before moving to Orchard Hotel as executive chef. His last position at Orchard Hotel was director of food and beverage.

Over the years, the culinary industry has recognised Chef Teo’s achievements with a host of awards and accolades. The World Gourmet Summit, an annual gourmet extravaganza is instrumental in placing Singapore on the world map as a food capital. As captain of the Singapore Culinary Team, Chef Teo led the team to finish with six medals, including two Olympic gold medals at the IKA 2000 Culinary Olympics in Erfurt. In 2002, Chef Teo again led the team at the Culinary World Cup in Expogast, Luxembourg, and finished second runner-up. In 2004, the team won four medals. That same year, Chef Teo was named Best Western Cuisine Chef at the Hospitality Asia Platinum Awards.

In recent years, Chef Teo became the first Singaporean to be appointed president of the Singapore Chef’s Association. He has actively been involved in judging at culinary competitions around the world and mentoring rising chefs as team advisor for the Singapore Culinary Team.

Eric Teo FaceBook page: [https://www.facebook.com/Chef-Eric-Teo-188335491210455/](https://www.facebook.com/Chef-Eric-Teo-188335491210455/)

**Chef Janice Wong:**

Chef Janice Wong established the 2am:dessert bar in 2007. In December 2014, she set up an eponymous shop at the Gardens by the Bay. It then moved to the ION Orchard and Marina Bay Sands. The shop focuses on pasty as art and is described as "interactive, edible art". She has opened a dessert bar in Melbourne, and, in 2016, she will expand the 2am brand to Tokyo and Hong Kong, where she has localized the menu.

Wong appeared on an episode of MasterChef Australia season 7, where she challenged contestants to recreate her intricate dessert—the cassis plum. Wong launched a self-published cookbook in 2011 titled Perfection in Imperfection and co-authored a second cookbook in 2013 titled Dim Sum. She speaks internationally and says that she takes these opportunities in part to represent Singapore.

Wong won the title of Pastry Chef of the Year from the World Gourmet Summit Awards in 2011, 2013, and 2015, Best Dessert Restaurant in IS Magazine's readers' poll 2012–2014, Young
Woman of the Year from Her World in 2012; and the "Asia's Best Pastry Chef" award from Restaurant magazine in 2013 and 2014.


**Chef Sam Leong**

Sam Leong is one of the most well-known Singaporean celebrity chefs. Having been trained in culinary arts by his father, a Malaysian Chef well known for his shark’s fin dishes, Chef Leong has come a long way. From becoming the executive chef of Jiang Nan Chun at Four Seasons Hotel at the age of 28 to being appointed as the director of kitchens/corporate chef for the Tung Lok Group, Chef Leong has also collected multiple accolades. A trend-setter in modern Chinese Cuisine, Sam has represented Singapore at some of the world’s prestigious culinary events, including the annual James Beard Foundation Awards (1999); Friends of James Beard Gala Dinner (2000); Master of Food & Wine, Australia (2002); Annual St Moritz Gourmet Festival, Switzerland (2002); and the Flavours of Asia event at Napa Valley, California (2004).

His webpage: http://www.samatforest.com/app/main.php/about/sam

**Chef Eric Neo**

Eric Neo was appointed Executive Chef at InterContinental Singapore in October 2011. In his role at InterContinental Singapore, Chef Eric will oversee all culinary operations and menus for Olive Tree (all-day dining and international buffet restaurant), Aroma (bakery), Man Fu Yuan (signature Cantonese restaurant), Lobby Lounge, Victoria Bar, and Aqua Pool Bar as well as the banqueting department.

Having started out as a chef at the age of 16, Chef Eric brings with him over seventeen years of culinary and catering experience across varied cuisines including Cantonese, Western, Peranakan and Malay, as well as local delights.

He rose through the ranks to become Head Chef of international buffet restaurant Aquamarine in Marina Mandarin Hotel before being promoted to the hotel’s Executive Sous Chef in 2006. He joined Crowne Plaza Changi Airport as Executive Chef in 2008, where he was an integral part of the preopening team responsible for developing menus and implementing operational procedures for the hotel’s food and beverage outlets including food preparation, quality control, timely deliveries, and satisfactory customer service.

Chef Eric’s culinary style leans towards the contemporary style of cooking, combining fresh ingredients and cooking them with minimal fuss, to showcase wholesome and delicious food whilst retaining the integrity of the ingredients. Olive Tree, the hotel’s all-day dining restaurant will provide a showcase for Chef Eric’s culinary skills, offering his signature dishes like Pan Seared Cod with Truffle Tomato Salsa, Asparagus Risotto with charred King Prawn, the well-loved local favourite Hokkien Mee and Ayam Panggang.

His webpage: http://www.sfba.com.sg/advisors_ericneo.html
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