

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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1 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 entering the agri-food 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.

1.1 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 a general country overview; section 3 provides an overview of the agri-food market; and section 4 an overview on market entry. These latter two sections contain information on: the food and beverage market, market access procedures, customs procedures, SPS and labelling requirements, intellectual property protection, including the status of geographical indications. The information contained within these sections is of a general nature and so may not be relevant for those in the more advanced stages of market entry.

If you want to find out more information relevant for your product, then check out the **Market Snapshots for Selected Products** (section 5). 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 direction. Contact information for a service provider, business facilitation support organisation, or from a business contact, could help put you in touch with the right parties who can help you to build your brand in the Singaporean market.

2 Country introduction and overview



Capital:	Singapore (city-state)
Population:	5.7 million (2019)
Area:	692 km ²
Political structure:	Parliamentary Democratic representative republic
Major languages:	English, Malay, Tamil and Mandarin Chinese
Major religions:	Buddhism (33%), Christianity (19%), Atheism (19%) Islam (14%)
Life expectancy:	82.8 years (men); 82.9 years (women)
Currency:	Singapore Dollar S\$ / SGD; 1 EUR = 1.51 SGD
GDP growth:	0.7% (2019)
Exports:	173 %of GDP (2018)
Imports:	149% of GDP (2018)
Main exports*:	Machinery and equipment (43%); Petroleum (19%); Chemical products (13%)
Main imports*:	Electrical machinery (27%); Mineral fuels including oil (23%); Machinery (14%)
Unemployment rate:	3.9% (2019)
Labour force:	68% (2019)
Main industries:	<ul style="list-style-type: none"> • Agriculture: +/- 0% of GDP • Industry: 25% of GDP • Services: 75% of GDP
Average household income (2018):	97 600 EUR
Household expenditure on food and beverages (2018):	4 559 EUR
Food and beverage market size (2018):	7.8 Billion EUR

Sources: Euromonitor International: Economies and Consumers, 2020; IMF; UN, World Bank; WHO, ECB.

* Goods only listed

2.1 Country overview: Singapore at a glance

2.1.1 Past economic and political trends

- ***Singapore's success initially resulted from its prime location and well-situated harbour for the trade among countries in the region.***
- ***After Singapore's independence in 1965 and its Federation with Malaysia, Singapore's previous colonial port became a leader in global trading and financing.***
- ***Singapore's GDP per capita grew immensely after its independence from EUR 450 up to EUR 50 200 back in 2015 and is still increasing yearly.***
- ***Ever since its independence Singapore is a republic and parliamentary democracy (with an elective and non-executive presidency) with Lee Hsien Loong currently being its third Prime Minister.***

At the beginning of the 19th century the British were looking for a suitable and new trading station at the Malay peninsula as their colonies grew and their trade with China was increasing. After searching the south part of the peninsula for a while they found Singapore, which later developed into an important port along the spice route and became a highly important military and commercial centre of the British Empire.

However, during World War II, Singapore was occupied by Japan. Due to the war Singapore had to face many different problems like high unemployment rates, labour strikes, social unrest, inadequate housing and many more including slow economic growth; developments which brought the local population together and they were arguing for their independence. This ultimately resulted in Singapore becoming a self-governing state within the British Empire back in 1959 and joined the Federation of Malaysia. The country has been governed by the People's Action Party (PAP) ever since then. In 1963, a few years after obtaining self-governing status the country declared its independence from Britain which was formally granted on 9th of August in 1965. Since its independence Singapore has been a republic and parliamentary democracy, with an elective and non-executive presidency. The government is comprised of a Prime Minister, a cabinet as well as a Parliament. Elections are to be held at a minimum every 5 years. Lee Hsien Loong is Singapore's third and current Prime Minister and has been in office since 2004.

With its new independence and separation from Malaysia came a new wave of economic challenges and uncertainties. However, the country's strategic location assisted greatly with tackling these. The country's leaders inaugurated a new era, strongly focused on promoting an export oriented and labour-intensive industrialisation process based on foreign investment. As a result of these efforts, the steady political situation, the advantageous terms of investment and the generally fast growth of the world economy between 1965-73, Singapore's GDP increased by more than 10% yearly during the same period. This rapid growth provided the country with new jobs and consequently with better social services and new infrastructure. During this time the GDP per capita was estimated to be the equivalent of about EUR 450 (lower middle income, around the same level as Mexico and South Africa at that time).

In the 1970's the government switched its attention from labour-intensive manufacturing to upcoming technology-intensive and high value-added industries, such as information technology. In 1989 more or less 30% of Singapore's GDP relied on the manufacturing industry. Hence, the GDP per capita had increased to EUR 11 650. The financial and international services sector was and still remains immensely important to the country, with growth rates reaching close to 25% in the late 1980's. Furthermore, Singapore was ranked as one the most important financial centres in Asia during this period.

In 1997, due to its economic relations with many other Asian countries, Singapore was hit by the financial crisis. The country's strong economy prevented the worst, but effects were visible still. Singapore's growth fell from around 8% in 1997 to around -2% in 1998, putting the country in a recession. However, the government reacted rather quick and introduced several procedures to take away pressure from the general population and businesses, and these remained in place until 1999-00. Due to those measures Singapore's economy began to recover in 1999 and started to thrive again.¹

Already back in 1990 the country was hosting more than 650 multinational companies and some thousand trading firms and financial institutions, and the importance of the country has only continued to grow alongside its GDP. In 2015 Singapore's GDP per capita reached about EUR 50 200, which means that the country now is at the same level as the US or Germany and that only after being independent for roughly half a century.² Yet, due to the high amount of foreign capital, direct investments and exports Singapore remains very dependent on the world economy and thus is very volatile, with its small and open economy sensitive to international shocks.³

2.1.2 Current economic situation and mid-term outlook

- ***Singapore is a high-income economy, one of the business friendliest places worldwide and also among the world's most competitive economies.***
- ***The biggest share of the GDP comes from the service sector (69.6%), followed by the manufacturing sector (22%) and the tourism industry (6%).***
- ***The real GDP is forecast to grow about 2% per year from 2022-26.***

As stated in 2.1.1 Singapore has developed a high-income economy. On the one hand, it is one of the business friendliest places worldwide according to most rankings and on the other hand it is one of the world's most competitive economies. Recently, Singapore has been ranked the world's best country in human capital development.

In Asia, Singapore is the most export dependent country and primarily relies on its service sector. Currently the areas of electronics and pharmaceuticals (production as well as research) are key focus

¹ Asian financial crisis (1997–1998) https://eresources.nlb.gov.sg/infopedia/articles/SIP_1530_2009-06-09.html

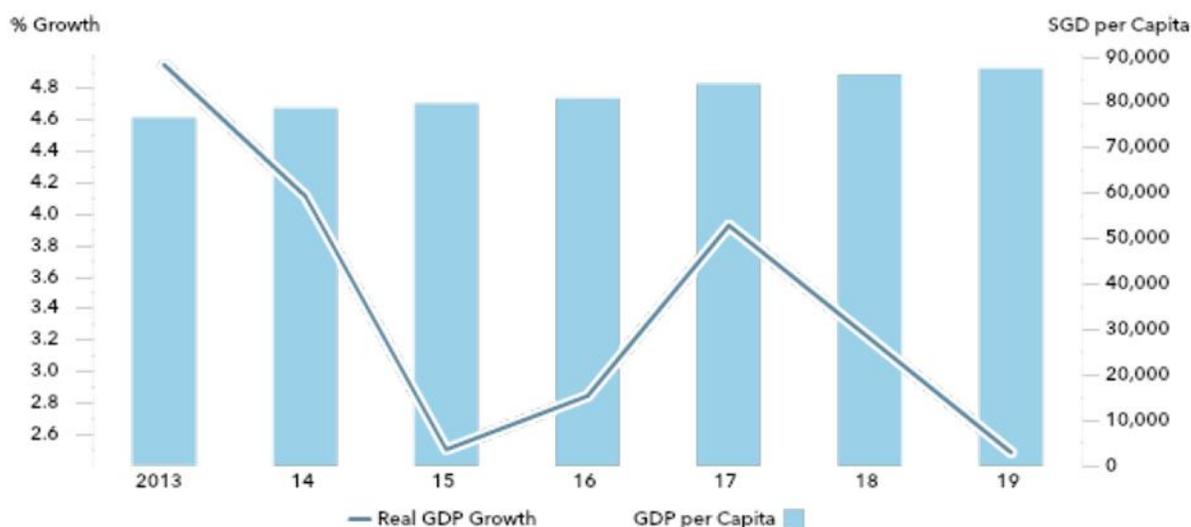
² A brief history of Singapore <https://www.guidemesingapore.com/business-guides/immigration/get-to-know-singapore/a-brief-history-of-singapore>; Singapore Profile – Timeline <https://www.bbc.com/news/world-asia-15971013>

³ Singapore still depends on world for growth <https://www.straitstimes.com/forum/letters-in-print/singapore-still-depends-on-world-for-growth>

areas. Caused by this shift, employment rates in manufacturing went down over recent years but the sector account for 22% of the GDP. The biggest share of the GDP comes from the service sector (excluding tourism), which has a 69.6% share, with the country's financial activities being the major driver. Singapore is the world's fourth largest financial centre after, New York, London and Hong Kong. In addition to financial activities, information and communication industries gained more importance as well. Furthermore, the tourism industry makes up 6% of the GDP.

As depicted in Figure 2-1 the economy grew strongly at around 5% in 2013 due to improved external demand and stronger public and private consumption. In the following years (2014-16) the economy grew at a slower pace, which accelerated again in 2017, where real GDP grew by 3.7%. Once again, the growth rate slowed down in 2018 to 3.1% due to fixed investments and strong exports. The country's real GDP is forecast to grow 1.5% in 2020 and circa 2.0% each year from 2022-26. Nonetheless some risks remain. First, Singapore has a strong exposure to the Chinese economy. Second, the US being one of Singapore's main trade partners could eventually demand more protected trade claims in the future. Furthermore, Singapore's high reliance on exports (and notably financial services) exposes it strongly to the broader global economy, as reflected in its historically highly volatile GDP growth rates.⁴

Figure 2-1: Real GDP Growth and Per Capita GDP in Singapore: 2013-2019



Note: Data for 2019 is forecast. GDP per capita are in constant 2018 prices

Source: Euromonitor International: Economies and Consumers, 2020

2.1.3 Populations trends

- **Population of 5.7 Million that is expected to surpass 6 million by 2030.**
- **Entirely an urban population, and the world's 2nd most densely populated country behind only Monaco.**

⁴ Euromonitor International: Singapore: Country Profile (2019); Overview Singapore <https://www.worldbank.org/en/country/singapore/overview>

- ***Singapore projected to have the world's 3rd oldest population by 2030.***
- ***The country is multicultural with ethnic Chinese representing 75% of the population followed by Malay at 13.4%, Indians at 9% and the remaining 3.2% comprising the many expats that work in the country.***

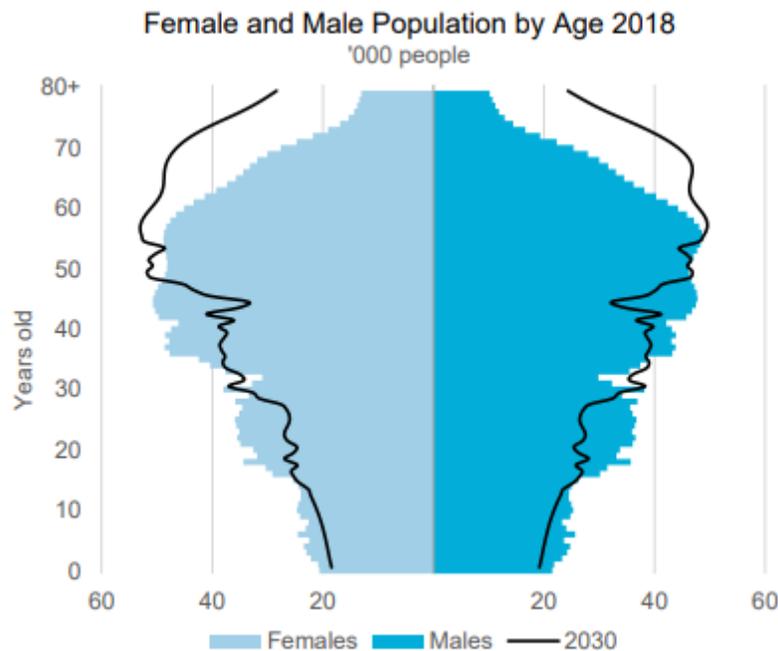
As of 2019, the country of Singapore has a population of 5.6 million and this figure is expected to surpass 6 million by the end of this decade due largely in part to immigration from other nations. From a population of only 1 million in 1950, the country's population has grown fivefold in less than 70 years. This can largely be attributed to the transformation of the Singaporean economy (see section 2.1.1), which resulted in a rise in the standard of living in the country as well as increase employment, education and health care standards; in turn meaning in the population living longer and healthier lives.

In 1957 the fertility rate of Singapore was 6.56 babies per women however today this has declined to a figure of 1.2 at present; a common phenomenon in developed countries as family sizes decline. Currently the population of Singapore is growing but this is largely due in part to immigration to the country. The government has played a big role in relation to the present-day population of Singapore. During the 1960s the government implemented a “stop at two” programme, which encouraged women to stop having children after the birth of their first two. This changed in the 1980s with the government was worried about falling birth rates; and a “have three or more” campaign was implemented which instead encouraged having children.

Of the present day 5.7 million, 4.03 million are citizens (and permanent residents) and 1.68 million are non-residents. As a first world nation, Singapore attracts many expats and tourists to its shores, driven by its unique geographical area as a crossroads between many nations. As noted in section 2.1.2 above, the country also serves as a financial hub for many businesses which leads to many business owners from abroad resettling in Singapore. The population continues to steadily increase despite a declining fertility rate of 1.2 live births. The population is rapidly aging and by 2030 Singapore's population of over 6 million will be the third oldest in the world (Figure 2-2). The median age of Singapore at present is 42 years, having increased steadily in recent years; a trend which is forecast to continue into the future.

Singapore is an extremely diverse country which can be seen by looking at the breakdown of religious, linguistic and ethnic groups of the country. The country is comprised of 75% Ethnic Chinese and the group considered indigenous to the country; Malay represent 13%. Indians compromise 9% while the remaining 3% is a collection of the many expats that come from all over the world to live and work in Singapore. This has led to the creation of the CMIO (Chinese, Malay, Indian and Others) an organisation dedicated towards integrating these groups into a single culture that represents the values of the Singaporean state. Mandarin Chinese and English are the most widely spoken languages in the country however Tamil and Malay are also quite commonly heard.

Figure 2-2: Age Pyramid in 2018 and 2030 in Singapore



Source: Euromonitor International: Economies and Consumers, 2020

2.2 Geography and key markets

Singapore is strategically located at the straits of Malacca, just 1 km off the coast of Malaysia and very close to Indonesia. Singapore's strategic location has allowed the country to gain prominence in global trade as the country is located next to one of the world's busiest shipping lanes; and its geographical location makes it a perfect location for connecting flights to Australia and wider Asia, in part helping to make the Singapore Changi Airport the world's 16th busiest airport handling over 65 million passengers in 2018. Singapore is broken down into 5 districts that cover the entirety of the country. Given how small the nation is – only 722 km², roughly the same area as covered by Berlin or Madrid - the districts are simply referred as South West, North West, Central Singapore, North East and South East. The role of each of these districts is to manage and initiate community programs that help to promote social cohesion. Each district is managed by a council who in turn elects a mayor to represent to local district while the remainder of the council is made up of 12 – 80 elected members.

The country can be accessed by car through Malaysia by crossing the Johor Causeway bridge or the second link bridge. Ferries also link Singapore with nearby Indonesia. Given its small land area and the large population it needs to sustain, the entirety of the country is urbanised with 100% of the population living in an urban area, making it the world's 2nd most densely populated country with 8 358 inhabitants per km².

Seasons in Singapore

As a nation located geographically close to the equator, the concept of four seasons does not apply to Singapore. Locals typically refer to their seasons as the wet season (September to February) and the dry season (March to August). As Singapore has to import most of its food and beverage products, seasons in neighbouring nations have a larger impact on the city-state than the weather in Singapore itself. An example of this occurred in 2019 when a poor harvest in Japan led to the price of Japanese cucumbers rising from 40 cents to \$1.40. The price of some fruit and vegetables also rose by 70% due to a poor monsoon season in Malaysia.⁵

2.2.1 Overview of urban markets

As noted in section 2.2 there are five administrative districts in Singapore.

South West: This district is home to around 250 000 individuals. It is the largest of the five districts covering roughly 1/3 of the total land area of Singapore.

North West: The north west district has roughly 531 000 individuals. It also has the woodland parks railway station and the Johor crossing, two major crossing points between Malaysia and Singapore. The region also hosts the Singapore zoo a major tourist attraction in the city state

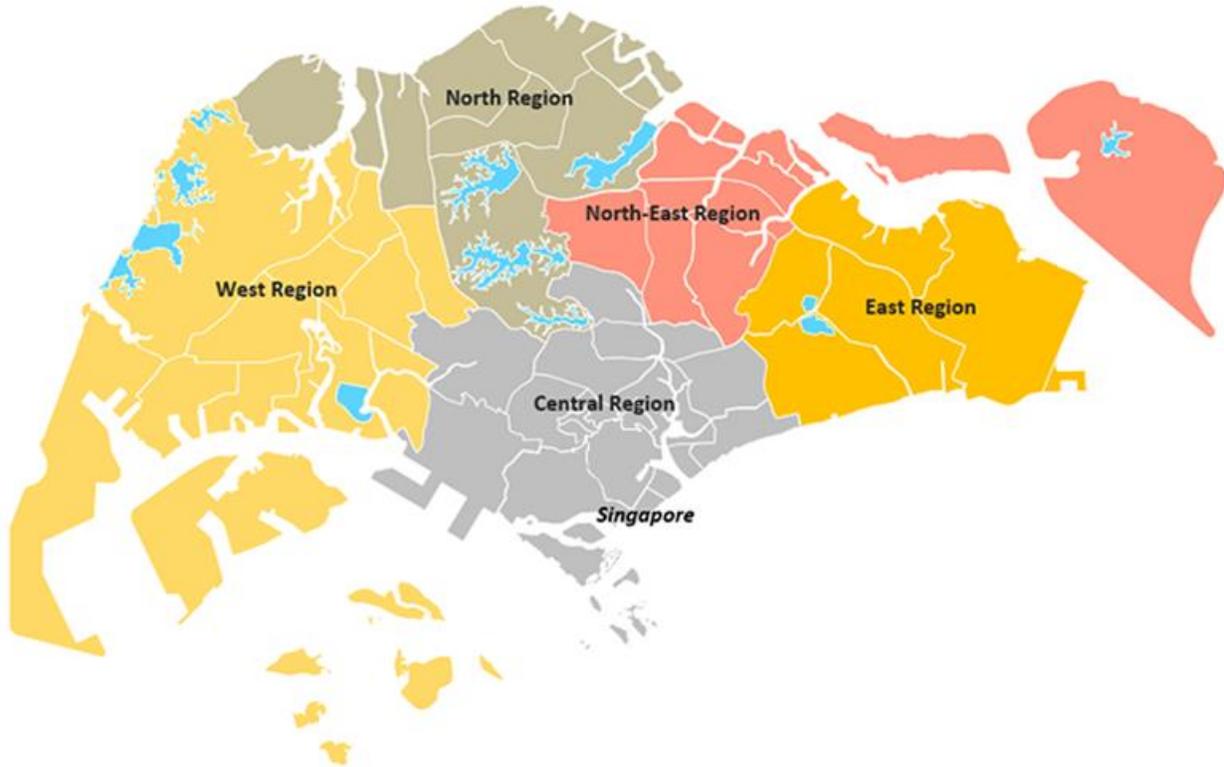
Central Singapore: The central region of Singapore is home to a large percentage of the economic activity of the country. The population of this region is roughly 950 000. The region is home to Singapore's Central business district (CBD) and many institutions of the government such as the parliament and the residence of the president. It is highly plausible that any meetings or visits will be conducted in the central region of the country.

North East: The North east region is rapidly becoming one of the most populous regions in Singapore thanks to a government backed incentive scheme to relocate Singaporeans to the region. The north east region hosts the Aerospace park, and the soon to be opened Singapore Institute of Technology. The region is also home to many manufacturers such as Rolls Royce and Singapore Technologies.

South East: The South east region has a population of roughly 650 000 individuals and is home to the Changi Airport and the Singapore University of technology and design. The region is host to many tech and financials organisations such as IBM and Standard and Poor's.

⁵ Vegetable prices soar as monsoon season arrives early, the strait times, available at : <https://www.straitstimes.com/singapore/health/vegetable-prices-soar-as-monsoon-season-arrives-early>

Figure 2-3: Administrative regions of Singapore



Agra CEAS based on the Government of Singapore official website.

2.2.2 Specificities of Singapore

When Singapore gained independence in 1965 the country was a low-income nation with limited natural resources that has managed to transform itself into one of the world's leading economies in 50 years. Many factors play a part in the rapid economic growth of Singapore and one of which is the geographic location of the country. As previously stated, Singapore is strategically located at the straits of Malacca, one of the busiest shipping lanes in the world and between the rapidly developing countries of Malaysia and Indonesia.

Various numbers demonstrate the specificities of the country.

- Today, the small city-state is home to the world's largest transshipment container port, linked to over 600 ports worldwide. The port has worked closely with shipping lines to build one of the world's densest maritime transport networks
- Singapore Changi airport has been voted the best internationally and is served by about 6 800 weekly flights to 330 cities. As part of these efforts, the Civil Aviation Authority of Singapore has concluded Air Services Agreements (ASAs) with other 130 States and Territories to increase the number of flight connections.

- Singapore has an extensive network of Free Trade Agreements with more than 30 trading partners to enhance its access to major markets (see section 4.3.2). The island nation's trade value (imports and exports combined) amounts to almost 3.5 times its GDP.⁶
- Thanks to the location of Singapore and the world class infrastructure in the country, it at time, makes more sense to ship goods via Singapore rather than direct. Today 20 out of the top 25 logistics companies in the world manage their activities from Singapore.

Due to Singapore's domestic market being quite small, the country has always had to look internationally to generate economic growth and has leveraged its unique location to become one of the largest transit points in the world today and this has also been aided by the following factors:

- **Innovative infrastructure and processes:** Singapore has continuously worked on improving the infrastructure of the country and to improve the speed and efficiency of every part of the logistics chain. Currently Singapore is working on what is known as the next generation port 2030 also plans on doubling the capacity of its already large Changi Airport with a focus on the shipment of time sensitive cargo and accommodating the transit of goods towards regional countries (see section 4.4.1)
- **Connectivity and a Proactive trading policy:** compared to other major transport hubs such as Amsterdam, the local market of Singapore is relatively small. A proactive trading policy has allowed Singapore to develop high frequency connections with destinations across the world. Singapore has FTA agreements with over 30 nations including now the EU bloc (see section 4.3). This encourages companies across the logistics chain to operate from Singapore, the reliability of Singapore to process goods and connect them to destination markets has led to a situation where it can be faster and/or cheaper to process and transit goods through Singapore than directly to the destination country.

This opens Singapore to act as a transit hub also for food and beverage products. As can be seen in several of the product snapshots in section 5, Singapore appears to have a trade surplus of certain products which makes little sense for a city-state with a very small domestic production capacity. This is where the transit hub status of Singapore makes its impact as a majority of food and beverage products exported from Singapore are in fact goods being sent on from the origin market to another destination market without entering the Singaporean market.

2.3 Domestic agricultural production and regions

As previously stated, almost the entirety of the city state of Singapore is urbanised, this leaves little room for agricultural activities leading to a situation where less than 0.5% of Singapore's GDP comes from agriculture. This scenario means that Singapore is almost entirely reliant on foreign imports of food to maintain its food security. Singapore is investing heavily in urban agriculture projects with the aim of reducing its dependency on importing food products, in particular for fruits and vegetables, from abroad but will likely continue to be heavily reliant on food importations for the foreseeable future to feed its

⁶ <http://blogs.worldbank.org/transport/three-factors-have-made-singapore-global-logistics-hub>

almost 6 million population. Singapore imports food products accounts for 90% of the country's food requirements.

Singapore has had to adapt to its urban environment and evolve new technologies to allow agricultural products to grow there, one such initiative is the growth of Agrotechnology parks. These Agrotechnology parks are modern agricultural estates developed with the appropriate infrastructure needed for farming. The parks have a total land area in Singapore of 1 465 hectares and can produce products like livestock, eggs, milk, fruit and vegetables. There are 6 Agrotechnology parks in Singapore which are located at:

- Lim Chu Kang
- Mandai
- Nee Soon
- Loyang
- Murai
- Sungei Tengah

Output from these farms remains low, however the government is investing heavily into Agrotechnology farms as a key method to reach its overall target of 30% domestic production of food requirements by 2030.⁷

⁷ Singapore and FAO factsheet, Available at <http://www.fao.org/3/AX464E/ax464e.pdf>

3 Introduction to the food and beverage market and consumers

3.1 Overview of the food and beverage market and demand for imported products

3.1.1 F&B market summary

As noted above, Singapore has minor agricultural economic activity. Its population of 5.7 million coupled with a land area of only +/-700 square km means that urbanisation of the entire city state has occurred leaving little room for agricultural development. Roughly only 0.7% of the total land area of Singapore is arable however the government of Singapore has pledged under its new “30 by 30” strategy to increase investments in its agricultural industry and reach 30% self-production of its food consumption by the year 2030, up 20% from the present rate of 10%.

As stated above, Singapore presently only produces 10% of the food it consumes. 27% of the eggs consumed in Singapore, 13 % of all vegetables and 10% of fish that is consumed in Singapore were produced locally. Although it remains unclear exactly which products the government of Singapore will prioritise as a part of its “30 by 30” strategy, it can be assumed that efforts to increase the production of leafy vegetables, fish, eggs and fruits will be a core element of this strategy. New initiatives such as rooftop farming, vertical agriculture and agrotechnology farms are some of the ways that Singapore is trying to increase its agricultural output under the constraints of an overwhelmingly urban environment.⁸

However, despite the low agricultural production, Singapore has a growing food processing sector. The industry was valued at 2.8 billion EUR in 2017 and accounted for 1.1% of the GDP of Singapore, employing 48 000 individuals. As Singapore has limited agricultural space, most of the ingredients required for the food processing sector have to be imported from abroad such as meat and seafood, dairy ingredients and fruit and vegetables. Singapore’s food processing sector is highly competitive: there are more than 750 industry players in the local processed food sector, including food manufacturers. This is in addition to the many food importers and over 23 000 food retail outlets in Singapore. Some of Singapore’s processed food production is subsequently exported.⁹

3.1.2 International trade in F&B

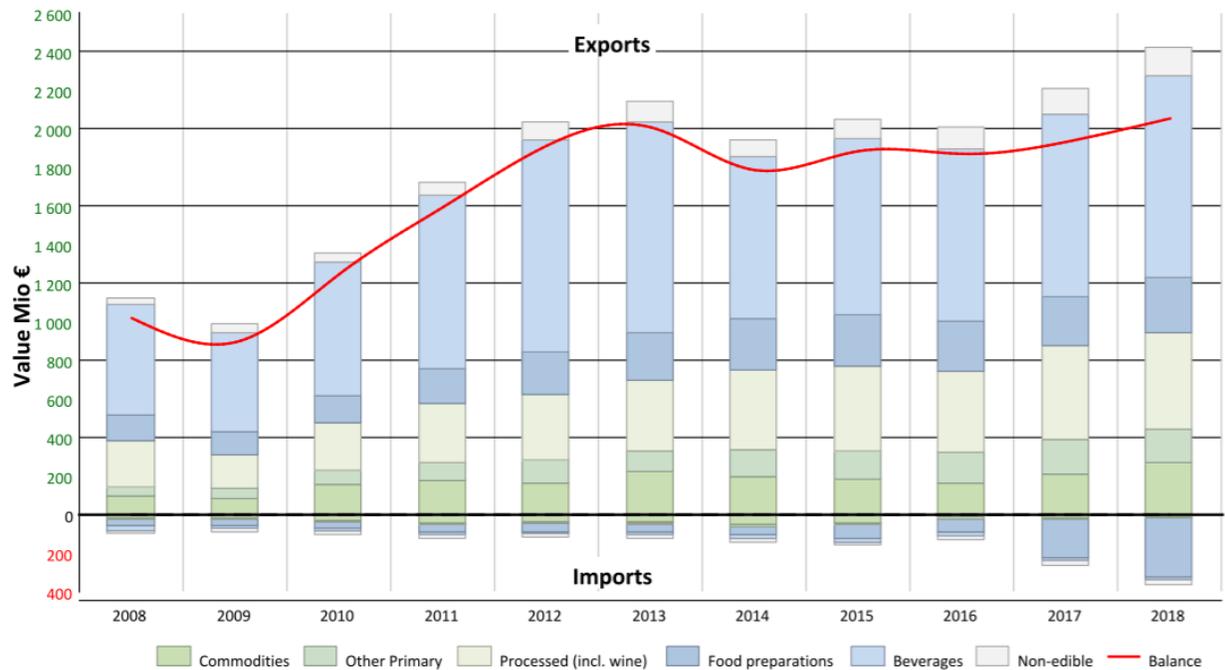
As noted above, Singapore is reliant on food imports – unprocessed products in particular. It is therefore unsurprising that the value of food imports substantially outweighs exports, despite the notable domestic food processing sector. Singapore imports many of its food and beverage products from nearby countries such as Malaysia and Indonesia as well as further afield from countries like Australia and The United

⁸ Singapore's 30 by 30 food production target: is it feasible? <https://www.todayonline.com/commentary/singapores-30-30-food-production-target-it-feasible>; From Sky farms to lab-grown shrimp, Singapore eyes food future <https://www.reuters.com/article/us-singapore-agriculture/from-sky-farms-to-lab-grown-shrimp-singapore-eyes-food-future-idUSKCN1T00F2>

⁹ USDA GAINS REPORT : Food processing ingredients Annual 2019 Available at <https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Food%20Processing%20Ingredients%20Singapore%20Singapore%207-29-2019.pdf>

States. Singapore is the fifth biggest export market in Asia for EU food and drink exports, with annual exports coming to EUR 2.4 billion in 2018 (up from EUR 1.1 billion over the 10 preceding years); and unsurprisingly the country imports several times the value of goods from the EU that it exports in return (Figure 3-1). The EU exports a significant amount of spirits and liqueurs to Singapore with France and the UK being the two largest exports of this product to the country.

Figure 3-1: Structure of EU-28* agri-food trade with Singapore, 2008 to 2018



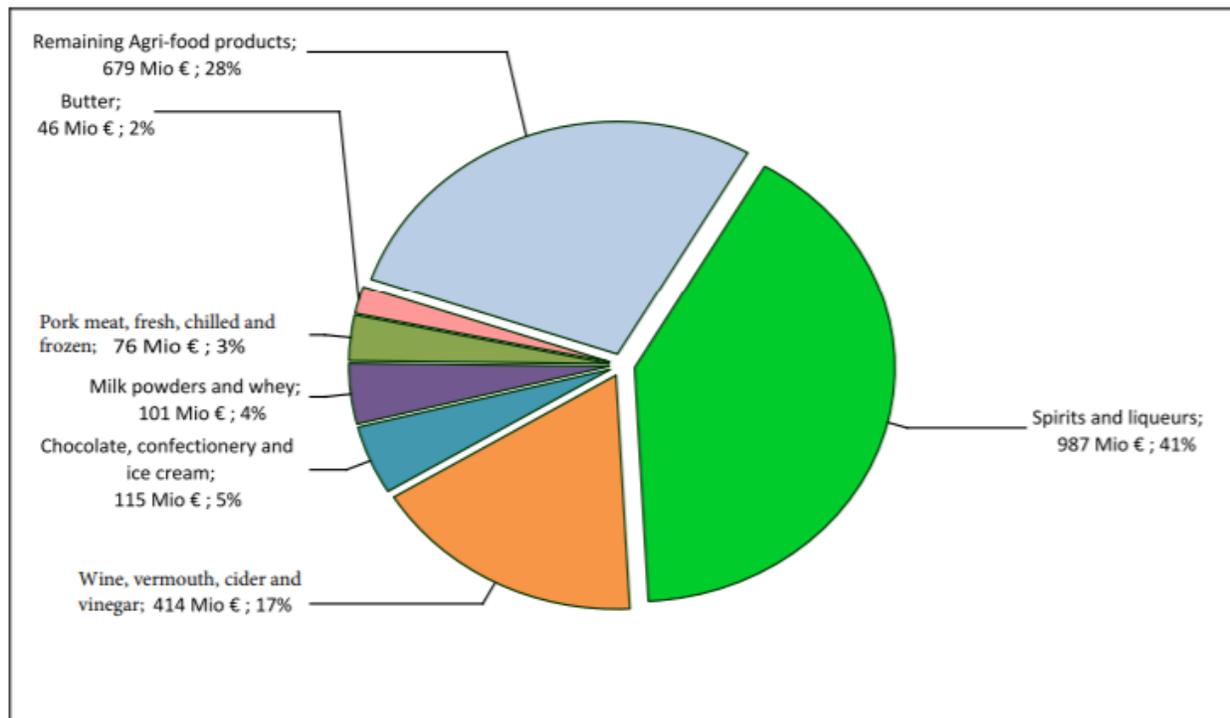
Source: European Commission: agri-food trade statistical factsheet, European Union – Singapore. Based on Eurostat-COMEXT data.

* For historical reasons, the data on the EU presented in this diagram includes the UK, data for which cannot be separate from EU-28 data in the diagram.

The major exports from the EU to Singapore in 2018 were, in terms of value:

- Spirits and liqueurs – 41%, 987 Million EUR
- Wine, Vermouth, cider and vinegar- 17%, 414 Million EUR
- Chocolate, confectionery and ice cream – 5%, 115 Million EUR

Figure 3-2: Top EU* agri-food exports to Singapore in 2018



Source: European Commission: agri-food trade statistical factsheet, European Union – Singapore . Based on Eurostat-COMEXT data

* For historical reasons, the data on the EU presented in this diagram includes the UK , data for which cannot be separated for this diagram.

3.1.3 The market for imported F&B

The market for imported food and beverage products in Singapore is huge as the lack of arable land in Singapore puts a strain on what the country is able to produce and creates a dependency on imports to maintain food security. The country of Singapore, being so heavily urbanised is abundant with retailers and grocers selling food and beverage products; and western and local fast food chains are quite common in the country, though the food sold at these various outlets are most likely entirely brought in from abroad. Across all of the food and beverage chain there exists the need to import products to meet demands of the Singaporean consumer, who has a higher level of disposable income than neighbouring countries. Furthermore, Singapore's diverse population (section 2.1.3) creates demand for a range of imported products. In view of these various factors, Singapore is a very attractive target market for a range of foreign food and beverage companies.

3.2 Growth Drivers and Trends

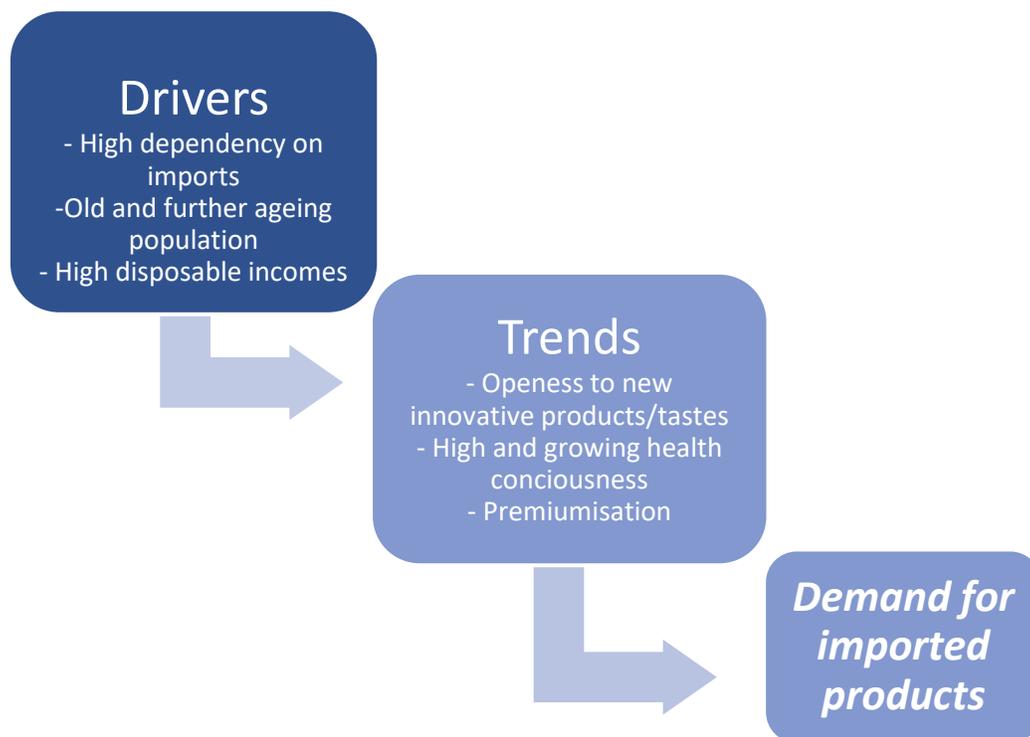
The key factors affecting the food and beverage market in Singapore are:

- **A high dependency on imports.** Singapore is a small city-state with nearly no own food and beverage production, but a lot of people living in the city. The high population requires high

numbers of imported goods for consumption and thus Singapore is extremely dependent on imports from other countries. Moreover, the population is very diverse, with many western expats living in the country. Especially those expats demand products they are familiar with from their respective homes and consequently foster the demand for European products.

- **The old and further aging population.** The population in Singapore is already quite old, and, is expected to further age in coming years to become one of the oldest in the world. Not only does this mean that fewer people will work, but also that consumption patterns will change as old people tend to prefer different goods to the younger generations.
- **High disposable incomes.** Singapore is a wealthy state and people are well off. This means they have comparatively a lot of money available to spend. High disposable incomes usually increase the demand and consumption of certain products. This drives the growth of the food and beverage market in Singapore and furthermore opens the market for many different new products.

Figure 3-3: Growth drivers and trends – the Singaporean food and beverage market



Source: Agra CEAS based on European Commission agri-food factsheet; USDA GAIN reports, Euromonitor International and various (see footnotes).

In terms of current trends, the following stand out:

- **Premiumisation.** Partly due to high disposable incomes of Singaporeans, premiumisation has become a trend. This means consumers increasingly prefer high quality and premium and branded products over their cheaper counterparts.

- **High and growing health consciousness.** This trend is also connected to high disposable incomes, but also to the general health trend which is visible nearly all over the world. Furthermore, especially the older generations tend to pay a lot of attention to their health. The aging population in Singapore will foster this trend even more in the coming years. Increased interest in organic is connected to this trend, and many supermarkets now have dedicated organic produce sections.
- **Openness to new innovative products and tastes.** Consumers in Singapore are very open to try new products and tastes. This could be a result of the population with highly diverse cultural backgrounds on the one hand, but on the other hand, regardless of origin consumers seem to be curious and interested in innovation and new exotic tastes.

3.3 Consumer profiles and preferences

3.3.1.1 Consumer profiles

Singapore's general consumer profile has various specificities. Notable ones' specifics are as follows:

- **Income:** As stated in section 2.1.2, Singapore is a high-income country on the one hand. On the other hand, it has been ranked as one of the most expensive countries in the world for some years. A household typically spends between 5 and 10% of its income on food and non-alcoholic beverages, while the largest share of the money is spent on utilities followed by leisure activities and transport. Singapore's per capita private yearly consumption expenses are estimated around EUR 27 200, though in percentage of GDP terms it has been decreasing since 2014. Rising inflation might be a future risk to its otherwise positive looking consumption outlook.¹⁰
- **Differences in income levels:** while Singapore is one of the wealthiest countries in the world, there are also quite strong differences in the level of income. While incomes have been increasing in last years, this has not stopped the income gap from growing. The income gap, 0.458 before taxes as measured by the Gini coefficient¹¹ (0 = strongest inequality, 1=strongest equality) was greater in Singapore than in other developed countries; indeed, despite the very high-income levels the Gini coefficient is more similar to that of a middle income country.¹²
- **Young vs old population:** As Singapore is predicted to have the third oldest population by 2030 an increasing focus should be put on the older generation. However, the younger generation is a very good target for online shopping. 80% of millennials use online shopping and even 69% order goods across borders.

¹⁰ Singapore: Reaching the Consumer <https://santandertrade.com/en/portal/analyse-markets/singapore/reaching-the-consumers>

¹¹ Key household trends 2019 <https://www.singstat.gov.sg/-/media/files/publications/households/pp-s25.pdf>

¹² Income inequality in Singapore <https://theaseanpost.com/article/income-inequality-singapore>; How Big of a Problem is Income Inequality in Singapore? <https://www.businesstimes.com.sg/wealth-investing/singapore-in-top-10-in-terms-of-average-wealth-per-adult>; Singapore in top 10 in terms of average wealth per adult <https://www.valuechampion.sg/2018/07/how-big-problem-income-inequality-singapore>; Key household trends 2019 <https://www.singstat.gov.sg/-/media/files/publications/households/pp-s25.pdf>; Singapore among bottom 10 countries for tackling income inequality: Oxfam report <https://mothership.sg/2018/10/singapore-income-inequality-bottom-10-oxfam/>

- **Increased focus on health and sustainability:** Consumers increasingly value healthier lifestyles (particularly those aged 30-44), which increases the demand for good quality food and sustainable products. Approximately 30% of consumers who do a lot of fitness and circa 20% of those who do not work out regularly stated that they will increase their health-related spending in the future. Interestingly, the age group 60 plus is currently exercising the most; while nearly 60% of millennials exercise weekly. Additionally, about half of the Generation X is taking vitamins and supplements no less than once a week.¹³ However, even though consumers value healthy products and are very aware of the environmental issues the world is facing today, they are mostly not willing to pay higher prices, instead believing such products should be the norm. For example, 4/5 of the population believes that businesses have the responsibility to make environmentally friendly products in the first place.
- **Low consumer loyalty:** Consumers loyalty for many products is fairly low. People are mostly open to try new goods, while a few remain loyal to certain brands associated with good product quality. New products therefore should be reasonably priced, because consumers are open to compromise as long as a products prize suits their budget. Moreover, consumers evaluate the benefits they gain from buying of a product and then decide if they buy it.
- **Digital Consumerism:** Consumption via online channels is especially high in Singapore. In general, more than 50% of the world’s smartphones are located in the Asia Pacific region, which opens a way of introducing new and innovative marketing channels; and this is certainly the case in Singapore. 4/5th of the population (all age groups) is connected to the internet. Thus, companies should indeed put efforts into digital marketing and e-commerce platforms to successfully meet their market targets.¹⁴

Even though Singapore is a small country, its citizen can be grouped into the following three main consumer types:

- **Balanced** (+/-40% of consumers): This type of the consumer is very practical. They are not likely to buy goods they do not necessarily need, nor do they often take impulsive decisions. Thus, they do not just buy for the sake of buying a product and they usually need to see the value of a product to go and buy it. Moreover, the balanced type pays attention to prices and will mostly try to save money. Their brand loyalty overall is not very high as they prefer lower priced products; and in general, they would prefer to find brand products and more expensive products on sale. Due to their drive to low prices, obvious discounts and easy price comparison techniques online and in store can attract these consumers; and more convenient shopping settings might even lead to them purchasing more impulsively. Furthermore, they might be a good target group for new products and brands as long as they are able to compete with prices of other products and are in line with their values.
- **Traditional** (+/-30% of consumers): This type of consumer is very set in its ways. Traditional consumers know the products they like and which ones they do not like. Like the balanced type,

¹³ Euromonitor International: Economies and Consumers, 2020

¹⁴ A glimpse of Singapore’s consumer market <http://www.singaporeincorporationservices.com/Blog/registration/a-glimpse-of-the-singapore-consumer-market>

they rarely buy out of impulse and they appreciate low prices to save money. In general, the traditional type does not enjoy shopping too much. Companies and retailers who manage to show exactly how and where this type of consumer can save money, while still having a nice shopping experience are likely to win them over and they will purchase again.

- **Spender** (+/-30% consumers): This category, unlike the previous ones, likes to spontaneously buy goods and follow their impulses while shopping. They like to be up to date and follow trends, which means they often pay attention to new products, products from strong brands, and luxury products. Depending on their income some of them enjoy spending much money on those goods while others are still looking for discounts and cheap offers for luxurious and branded products. Thus, luxury and strong-branded products, especially the trendy ones, are most likely to spark the interest of these consumers. Goods that are promoted on social media and/or by celebrities are likely to be bought. One way to attract this consumer is to create online, mobile or in-store platforms that are easy to access and give the customer a good shopping experience. Some focus could also be put on proper advertising, sales, discounts and bargains, as these consumers will tend to buy even more impulsively.¹⁵

3.3.2 Cultural Sensitivities and Other Considerations

Like in every country, there are some very specific aspects to Singapore and sensitivities that should be taken into account as well. Some of these that are particularly relevant to business owners and companies interested in exporting food and beverage products are listed below.

3.3.2.1 Dress code and punctuality

The dress code is different from the European one, mostly due to Singapore's warm and humid climate. Business attires therefore are adapted to the all year-round weather conditions and have a tendency to be more informal than in other Asian countries like Korea or Japan. This means it is generally acceptable for men to wear their shirts and trousers without a tie and jacket; while women often wear light business suits. Moreover, colours can be lighter and brighter than dark blues, greys or black. If accessories are worn, they tend to be of good quality and not too opulent.

Punctuality is highly important for Singaporeans. People usually are on time and stay within scheduled meeting timeframes and keep deadlines. Thus, it is highly important to do the same and to always be on time.

3.3.2.2 Business Cards and Networking

Business Cards are important to exchange when doing business. Cards are to be exchanged with two hands and thoughtfully read before putting them away (in a business card case). They are to be treated respectfully because the approaching business relationship will be built on this exchange.

¹⁵ Euromonitor International: Economies and Consumers, 2020

Networking is an essential part for successful businesses in Singapore. The Singaporean consumers are mostly highly educated and travel affine. Doing business is a long-term process, which makes it important to build strong business relationships, especially for new start-ups.¹⁶

3.3.2.3 Gift giving

Giving gifts in a business context is not as common as in other Asian countries. The Singaporean government introduced some rules concerning gift giving to prevent corruption from happening as much as possible. The reason behind this are some corruption scandals in other Asian countries. However, gifts can be given to a whole group, rather than one individual, but should not be expensive (e.g. pens with logos are appropriate). Gifts should be wrapped as it is common in this region and are usually not opened in front of the gift giver. Yet black and white wrapping paper should be prevented because those colours are associated with grief.¹⁷ As a result of Singapore being a multicultural nation with different ethnic groups, gift giving traditions differ:

- **Giving gifts to Chinese Singaporeans:** Out of politeness Chinese often refuse to accept a gift a few times first. Gifts are often wrapped in red or gold coloured paper. Gifts should not contain yellow or white flowers, umbrellas, green hats, clocks, handkerchiefs or sharp objects. Furthermore, the number 8 means 'get rich', while the number 4 stand for 'die' and thus should not be part of a gift related to numbers. It is unpolite to bring food to a dinner (unless agreed beforehand) because it makes the host appear incapable of hosting the dinner alone. At Chinese New Year mandarin oranges are typically given to the host. Oranges must come in even numbers, usually two or four.
- **Giving gifts to Malay Singaporeans:** Malays appreciate gifts. If invited to a home, small gifts like flowers, candies or toys for children are appreciated. Most Malays are Muslims and therefore giving alcohol or pork is not an option. It is suitable to bring food to a dinner, but all food gifts need to meet halal standards.
- **Giving gifts to Indian or Hindu Singaporeans:** Bright colours are associated with happiness, and thus wrapping paper should be red, yellow or green. It is inappropriate to gift Hindu Indians with food, including beef. They do not use cattle products and therefore leather products are inappropriate as well. It is important to know that the receiver drinks alcohol before considering bringing it as a gift. Moreover, frangipanis (flowers) should not be given either because they traditionally are used for funerals. Money should be always given in unusual numbers (EUR 11 instead of EUR 10) because those are believed to bring more luck.¹⁸

¹⁶ A glimpse of Singapore's consumer market <http://www.singaporeincorporationservices.com/Blog/registration/a-glimpse-of-the-singapore-consumer-market>

¹⁷ Cultural differences in Singapore <https://www.netherlandsworldwide.nl/countries/singapore/doing-business/cultural-differences-in-international-business>

¹⁸ International Gift Giving Etiquette – Singaporean Culture
<http://www.1worldglobalgifts.com/singaporegiftgivingetiquette.htm>;
<https://culturalatlas.sbs.com.au/singaporean-culture/singaporean-culture-etiquette>; Singapore | Preparations | Etiquette and Customs <https://expatessentials.net/singapore-preparations-etiquette-and-customs/>

3.3.2.4 Traditional cuisine and differences in food that can be eaten

The traditional cuisine historically was influenced by Singapore's neighbours from the myriad cultures such as e.g. Chinese, Indians and Indonesians. Indeed, the cuisine has influences from many different places and can be seen as a culinary melting pot combining different cooking styles as well as flavours. Today, many dishes originating in other regions are perceived Singaporean such as Chinese wonton mee and Indian biryani. Due to Singapore's multicultural composition, its cuisine takes into account and has been formed by different religions. Muslim dishes without pork and alcohol, beef free dishes for Hindus and vegetarian Buddhists are only some examples that influence the diverse culinary cuisine; which in turn relies on a wide and varied range of ingredients. As a result of both the colonial period and globalisation, western cuisine is representative for the country as well; Italian pasta, Spanish tapas and the French gastronomy for example. Furthermore, Latin American cuisine is becoming popular, with Mexican and Brazilian traditional food being favoured. Another visible trend is fusion restaurants, which combine western food with Asian influences.¹⁹

Despite its very limited domestic agricultural production, locally available ingredients are important for Singaporean dishes. Due to its location at the South China Sea and the Straits of Malacca people enjoy eating seafood including different fish, crabs, stingray and pawns. "Belacan", a shrimp paste is commonly used to season dishes, together with bean-sauce and common Chinese-style soy sauce. In addition to seafood, fresh fruit like mangosteen, pineapple, rambutans, longans, lychee and durian are essential ingredients as well. For their desserts Singaporeans especially use palm sugar, pandan and coconuts.

3.3.2.5 Eating habits

Locals enjoy eating frequently, which is why it is common for them to have around five or six meals per day. Food is incorporated in everyday life because instead of only greeting each other, Singaporeans will ask "Have you eaten?".

At the high end of the cuisine spectrum, upscale restaurants with quality food are numerous in relative terms. Within the size wise small country, 39 Michelin-starred restaurants are located, as well as seven restaurants which made it on Asia's 50 best Restaurant list for 2019.²⁰

3.3.2.6 Regulations

Singapore has very strict laws, that need to be kept in mind when visiting. The city is very clean, and fines are given for littering and spitting. Moreover, it is not allowed to chew chewing gum (medicinal ones e.g. nicotine gums are allowed if necessary). Smoking within the city is only allowed in designated smoking areas, which usually are outlined with yellow lines. Moreover, it is restricted to eat or drink in public transport. Fines for breaching some of these regulations can reach up to EUR 450.²¹

¹⁹ Western Cuisine <https://www.citynomads.com/food-drink/western-european/>

²⁰ Spotlight on Singapore: Introduction to Singaporean Cuisine <https://asianinspirations.com.au/experiences/spotlight-on-singapore-introduction-to-singaporean-cuisine/>

²¹ Things Tourists Should Avoid Doing in Singapore <https://theculturetrip.com/asia/singapore/articles/7-things-tourists-should-avoid-doing-in-singapore/>

4 Market access and entry

This section provides details on the necessary requirements for entry into the Singaporean market, outlining existing market access restrictions and explaining procedures. A summary of market access and entry is presented in section 4.1, in the form of a SWOT analysis.

4.1 Summary SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Very heavy reliance on imported foods. ▪ Wealthy population, generally with high disposable income. ▪ IP is well protected, and 138 GIs are listed for protection under the EU-Singapore FTA. ▪ While standards are high, market access requirements are generally less strenuous/more efficient than many other countries in the region. Prelisting now in place for meat. ▪ Singapore is the EUs largest trading partner in ASEAN, a group that is projected to be the world's fourth largest economic bloc by 2030. 	<ul style="list-style-type: none"> ▪ Small population / potential market. ▪ Multicultural population further fragments population, meaning that niche markets are particularly small. ▪ Distant market (around 40 days shipping time), which makes the transport of fresh produce more challenging. ▪ Government have implemented restrictions on the marketing/advertising of certain products such as baby food and alcohol consumption.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Opportunities across the board due to reliance on imports. ▪ Singapore is an important regional hub for South East Asia, and hence may offer a gateway for exporting to the broader region for some products (alcohol in particular). ▪ Building on the above, Singapore is recognised for high SPS standards in the region, further reinforcing its position as a potential gateway. 	<ul style="list-style-type: none"> ▪ Considerable import competition in all product categories, most notably from geographically closer ASEAN neighbours, Australia, New Zealand and the US. ▪ Possibility to permanently challenge GIs under domestic law exists and only are protected for a period of ten years. ▪ While domestic agricultural sector is small, the domestic food processing industry is notable and provides competition in some categories. ▪ Singapore's 30 by 30 strategy aims to reach 30% domestic food production by 2030, lowering demand for imported goods.

4.2 Food and beverage legislation and regulations

4.2.1 Import requirements/restrictions, customs procedures and documentation

The general steps which must be followed for importing goods into Singapore are as follow²²:

1. **Register for a UEN (Unique Identity number) and activate customs account:** any entity that intends to engage in importation or exportation activities in Singapore must register for a UEN number and activate their customs account upon receiving their UEN number.
2. **Check if goods to be imported are controlled** or if they are goods subject to restrictions by competent Authorities (CAs) in Singapore. This can be done by using the HS/CA product search engine: <https://www.tradenet.gov.sg/tradenet/portlets/search/searchHSCA/searchInitHSCA.do>. If the item is subject to control, the name of the Competent Authority will be indicated next to the HS code. If advice is required on the full 8-digit HS Code (harmonised system) it can be obtained by requesting a classification ruling at a fee of SGD 75 (roughly EUR 50).
3. **Open and send the customs declaration form:** the company importing or the declaring agency working on its behalf must maintain an Interb-Bank GIRO (IBG) with the custom agency of Singapore to ensure payment on duties, taxes, fees and penalties are made.
4. **Furnish Security:** it will be necessary to furnish security transactions involving dutiable goods, temporary import of goods for previously approved purposes and for the operation of licensed premises such as factories of warehouses. The security furnished should come in the form of a Bankers Guarantee or an insurance bond.
5. **Apply for Customs Import Permit:** this can be done in one of the following ways.
 - Appoint a declaring agency to work on your behalf.
 - Apply custom permits for your own behalf of the consumer base to do this you will need to apply for a Tradenet ID.
 - Each permit will cost traders roughly SGD 3, this does not include service fees charged by service providers.
6. **Prepare documents for cargo clearance:** permits that get approved are subject to a validity period in which the permit must be used. It is necessary to ensure the permit is valid upon importing. For the importation of containerised cargo, it is necessary to produce a customs permit, and other supporting documents such as an invoice, air waybill and a packing list to checkpoint officers for inspection.
7. **Retain the trade documents:** generally, it is only necessary to retain the relevant supporting documents to the purchase, import, sale and export of a good for a period of 5 years from the date of approval of the permit. Singaporean custom agents are within their rights to ask for documents during the five-year waiting period.

General documentation requirements for goods imported into Singapore are set out in Table 4-1. There are additional documentation requirements for specific products/HS codes (e.g. veterinary health certificate for meat products). Links to the list of documents specific for each product / the portal to check requirements is provided in each product snapshot in section 5.

²² <https://www.customs.gov.sg/businesses/importing-goods/quick-guide-for-importers>

Table 4-1: General requirements for goods exported to Singapore (including F&B)

Name	Description	To be prepared by	Language
Air Way bill	A document containing the details of the transportation of products by air and proving the transport contract between the consignor and the carrier's company. One Air Waybill may be used for the multiple transshipment of products.	Carrier (or his agent)	Usually EN
Bill of Lading	A document containing the details of the international transportation of products by sea.	Carrier (or his agent)	Usually EN
Commercial Invoice	A document containing the details of the transaction. To be submitted to customs in triplicate.	Exporter	EN
Singapore Inward Declaration/Import Permit	A document declaring the goods to be imported to Singapore Customs. To be completed online; registration with Singapore customs required.	Importer	EN
Pre arrival and arrival notices	Notification of the arrival / impending arrival of vessels.	Carrier (or his agent)	EN
Insurance Certificate	A document proving that a contract for the insurance of the goods has been signed. May be required for customs clearance.	Insurance company of the importer/exporter	EN
Manifest	A document notifying the authorities of the arrival of a vessel/an aircraft and summarising the goods loaded therein.	Freight forwarder (or his agent)	EN
Packing List	A document containing the details of the shipment, including content of the packages, description of the goods, marks and numbers.	Exporter	EN/FR
Proof of preferential origin	A document confirming the preferential origin of the goods to be imported. It is required if preferential treatment under an FTA or arrangement is claimed. A certificate of non-preferential origin may be requested by customs for goods without preferential origin for which customs has doubts.	Exporter	Usually EN

Source: European Commission Market Access Database.

Category of food product according to the Singapore Food Agency (SFA)

Before exporting any food or beverage products to Singapore, exporters should confirm the classification of their food product according to the Singapore Food Agency (see box below). The main categories are displayed in Table 4-2. In addition to these categories, a category of novel foods exists. It is only necessary to consult the conditions on novel foods²³ if a product does not fall inside the categories in the table below (which should not normally be the case for the products covered in section 5 of the handbook).

²³ Novel food covers foods and ingredients which do not have a history of safe use, or those produced using advances in technology to produce compounds chemically identical to naturally occurring substances).

Singapore Food Agency (SFA)

The Singapore Food Agency is responsible for food safety in Singapore as its name suggests. It was created in 2019 in order to centralise food safety in one entity. More details on the agency and the act establishing it can be found in section 4.2.2.

Market Entry Handbook

Table 4-2: Product classification according to SFA; mapping to handbook categories and overview of legislation/permits

SFA Category	Brief overview	Link to CN codes of products in this group according to SFA24	Key legislation to comply with	Import permit fees	Main products in this handbook falling under this SFA category*
Meat	Whole carcass or any part of animals, whether chilled, frozen or processed. All products containing over 5% meat fall in this category.	https://www.sfa.gov.sg/docs/default-source/tools-and-resources/product-codes-for-tradenet/product-code-list-for-meat-and-meat-products-(updated-1-oct-2019).pdf	Wholesome Meat and Fish Act Sale of Food Act	SGD 4.60 / 100kg (chilled, frozen, processed) SGD 77 per consignment (canned)	Fresh meat Processed meat
Fish	Fish, crustaceans, molluscs, sponges, other aquatic life; whether live, chilled, frozen, processed or in canned form.	https://www.sfa.gov.sg/docs/default-source/tools-and-resources/product-codes-for-tradenet/product-code-for-fish-and-fish-products-(updated-1-oct-2019).pdf	Wholesome Meat and Fish Act Sale of Food Act	SGD 3 per consignment	
Fresh fruit and vegetables	Raw and unprocessed fruits and vegetables. Products which have undergone some processing fall under processed foods.	https://www.sfa.gov.sg/docs/default-source/tools-and-resources/product-codes-for-tradenet/product-code-list-for-fresh-fruits-and-vegetables.pdf	Control of Plants Act Sale of Food Act	SGD 3 per consignment	Fresh fruit and vegetables
Table eggs	As per title	None available	Animal and Birds Act Sale of Food Act	SGD 62 per consignment	
Processed eggs	Salted and preserved; liquid and powdered; and cooked eggs	https://www.sfa.gov.sg/docs/default-source/tools-and-resources/product-codes-for-tradenet/product-code-for-livestock-and-animal-products-(updated-15-mar-2019).pdf	Sale of Food Act	SGD 22 per consignment	

²⁴ Links correct at time of writing. The release of new versions may result in these links becoming invalid or updated. In such a case it is recommended to check the website of the SFA: <http://www.sfa.gov.sg>; <https://www.sfa.gov.sg/food-import-export/general-classification-of-food-food-products>

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Processed food	All products of a food nature not grouped in the above categories.	https://www.sfa.gov.sg/docs/default-source/tools-and-resources/product-codes-for-tradenet/product-codes-(processed-food).pdf	Sale of Food Act	Nil	Dairy; Wine; Spirits; Beer; Olive oil; Chocolate / confectionery; Ice cream; prepared baby food; Pasta; Baked goods; Biscuits and cereal bars; Processed F&V
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Source: Singapore Food Agency

* This mapping is indicative and general, for example a pasta product stuffed with meat may fall under the category of meat products rather than processed food. The product being exported should be carefully checked against the descriptions and CN codes provided.

Trader's licence

It is necessary to apply for a trader's licence or register with the SFA before importing food into Singapore. Difference licences are required for the different categories as follows:

Type of licence	SFA categories covered	Details	GIRO acc required?
Licence for Import/Export/Transshipment of Meat and Fish Products	Meat Fish	SGD 84 per year. Normal service processing time of 1 day.	Yes
Licence for Import/Transshipment of Fresh Fruits and Vegetables	Fresh fruit and vegetables	SGD 378 per year. Normal service processing time of 1 day.	Yes
Licence to Import Table Eggs	Fresh eggs	Free, 5 working days to process.	Yes
Registration to Import Processed Food Products and Food Appliances	Processed eggs Processed food	Free, 1 working day to process.	No

As noted in the table above, a GIRO account is required for traders with the licences other than for processed food products. This account serves to pay licence renewal fees (where applicable) and permit fees. Information on a GIRO account and how to open one can be found here:

<https://www.sfa.gov.sg/e-services/payment-modes#giro>

As a general rule, if working with a local partner who is serving as an importer it is recommended to talk with them first as they should possess the necessary licence and GIRO account; and should assist with import permits and any eventual inspections (see below).

Guide on how to apply for licence/registration

A guide on how to apply for the licences/registration referred to above can be found at the following link (in English):

<https://www.sfa.gov.sg/docs/default-source/e-service/step-by-step-guide/guide-on-lic-and-reg-renewal.pdf>

Import permit

An import permit is required for all food products brought commercially into Singapore, regardless of the means of transport. This can be obtained through the Network Trade Platform (<https://www.ntp.gov.sg/home/?TYPE=login>). The following are required:

- Licence / registration number
- HS / product code (please see category table above which links HS code to product code)
- Establishment code to identify exporting country (see here for the list: <https://www.sfa.gov.sg/docs/default-source/tools-and-resources/casc-code-1/listofestablishmentcodesinaothercountriesexcludejap>)

Any additional documents can also be uploaded through this platform.

Any import fees should be paid through the GIRO platform (see above).

Upon approval, a Cargo Clearance Permit (which also serves as the SFA import permit) will be issued. This should be provided at the border checkpoint for the clearance of goods.

Establishment accreditation

Food products imported into Singapore must come from source approved by SFA. The accreditation process varies by product type:

Meat

This applies to the SFA category of meat products. Overseas establishments also need to be accredited if they produce any beef product (regardless of meat content).

Accreditation occurs at three levels, and each level of accreditation must be completed before the next can be performed:

1. The competent authorities of the exporting country must be accredited (see <https://www.sfa.gov.sg/docs/default-source/tools-and-resources/resources-for-businesses/approved-countries.pdf> for the current situation).
2. The slaughterhouses and meat processing establishments wishing to export to Singapore must apply for SFA accreditation through the competent authority of their country. Two different forms exist: one for slaughterhouses / cutting plants (https://www.sfa.gov.sg/docs/default-source/e-service/food/application-form_slaughterhouse.docx?sfvrsn=161b1694_26) and one for canning / processing plants (https://www.sfa.gov.sg/docs/default-source/e-service/food/application-form_processingcanning.docx?sfvrsn=111b1694_21)
3. Applications must be made for new products from approved slaughterhouses / establishments.

Processed products, fruit and vegetables.

Only establishments regulated by the competent authority in the country of origin are permitted to export their products to Singapore. No additional accreditation from SFA is required.

Live poultry, fresh table eggs and processed eggs

Competent authorities in the country of origin and the farms are must seek SFA approval prior to export. As these sectors are out of scope of the sectors covered in section 5 of this handbook, it is recommended to consult the SFA website on the procedures, if of interest.

Inspection of food on arrival

The Cargo Clearance Permit obtained at the import permit stage will indicate whether or not inspection is required. Booking can be made online for an inspection appointment through the following link: <https://ifast.sfa.gov.sg/eserviceweb/>

The cargo clearance permit and other relevant documents (e.g. invoices, health certificates) will be required at inspection.

4.2.2 Food safety and other food certification requirements

As Singapore is heavily reliant on the importation of food, the government has taken steps over the past year to ensuring that there is a single authority that can ensure that food imported from abroad is safe for consumption. These steps include the adoption of the Singapore Food Agency Act of 2019 which centralised food safety into one entity, the Singapore Food Agency (SFA). This act provides for the establishment of the SFA, consolidating all food related functions previously under the Agri-food and Veterinary Authority of Singapore, National Environment Agency and the Health Sciences Authority.



The Role of SFA is to:

- ensure and secure a supply of safe food for Singapore; and subsequently it is responsible for all legislation listed in this section.
- promote and develop the food industry, including any enterprise based on using agri-biotechnology.

The SFA also has the right to represent the Government internationally on matters relating to fisheries, and for food, food businesses, food safety, food supply and on matters that may be included in food standards.

The key piece of legislation applying to all food types is the Sale of food Act. This was originally introduced in 1973 and most recently fully revised in 2002, though there have been frequent amendments (most recently in 2019 at the time of writing). This act provides for:

- rights and obligations of organisations and individuals in assuring food safety;
- conditions for assuring safety of foods and food production, trade, transport, import and export;
- food advertisement and labelling;
- food testing;
- food safety risk analysis;
- prevention of food safety incidents;
- food safety information, education and communication.

The food regulations, which are under the sale of food act, provide more detailed provisions on the following:

- General requirements for labelling and exemptions from these;
- Containers and hampers to be labelled;
- Nutrition information panels;
- False or Misleading statements, including in advertising;
- Date-marking and the removal of date-marking prohibitions;
- Claims as to presence of vitamins and minerals;
- Imported food to be registered;
- Food additives;
- Incidental constituents in food;

- Mineral hydrocarbons;
- Containers for food;
- Irradiated food.

In addition to the sale of food act and the food regulations under this, there are three further acts of relevance to specific foods:

- The Wholesome Meat and Fish Act, which applies to meat and fish products (according to SFA definitions – see Table 4-2).
- The Control of Plants Act, which applies to fruit and vegetable imports.
- The Animal and Birds act, which applies to fresh eggs.

More details on the relevant parts of the first two acts above are provided in sections 5.1 on fresh meat and 5.2 on fruit and vegetables. However, it should be remembered that any product containing meat, whether fresh or processed, in a proportion above 5% is considered a meat product by the SFA and must comply with the Wholesome Meat and Fish Act.

Certain specific requirements on food additives and pesticides/other contaminants are touched on in the sections below.

Food additives

Additives are regulated in the Food Regulations (Numbers 15(3) and (4)). The Food Regulations identify 14 main types of permitted food additives; the definition of additives; the details of additives including their permitted uses and proportions; and any specific labelling requirements. The Regulations are frequently updated to take into account new products, risks and scientific findings.

Food additive database

A database that allows a search of food additives authorised in Singapore can be found at the link below. As per the disclaimer on the web page, it is solely for the purpose of information; and the Food Regulations should be consulted for details on which additives are permitted in Singapore.

<https://www.sfa.gov.sg/tools-and-resources/food-additives-search>

Singapore is a member of the Codex Alimentarius Commission, and generally recognises CODEX approved food additives for imported foodstuffs as being safe. Nonetheless, it must be remembered that foods imported into Singapore need to comply with food standards and labelling requirements in the Food Regulations.

Pesticides and other contaminants

Imported fruit and vegetables must not carry any prohibited pesticides, or levels of a pesticide residue exceeding those set out in the Food Regulations (ninth schedule).

Lists of pesticides and MRLs

The February 2019 version of the Food Regulations, which contains the list of maximum residue levels of pesticides by substance and type of food, can be found at the following link:

[https://www.sfa.gov.sg/docs/default-source/default-document-library/food-regulations-\(1-feb-2019\)](https://www.sfa.gov.sg/docs/default-source/default-document-library/food-regulations-(1-feb-2019))

The link above is to the most recent consolidated version of the Food Regulations at the time of writing. However, it is important to note that, as the Food Regulations are updated, the list in the ninth schedule may also change. It is therefore recommended that checks are made to see if a newer version of the Food Regulations, or any unconsolidated amendments, have been released.

A database of pesticides for commercial cultivation within Singapore can be found at the following link:

<https://www.sfa.gov.sg/tools-and-resources/pesticides-search>

Foods containing incidental constituents are not permitted under the Food Regulations. Regulations 29-35 cover this in detail and should be consulted for more information. However, some key points to retain are:

- There are maximum levels for the heavy metals arsenic, lead, copper and tin in all products. Maximum levels for mercury in fish and cadmium in molluscs, mushrooms and seaweed also exist.
- Food containing antimony in excess of 1 part per million is not permitted.
- Antibiotic residues or their degradation products in milk, meat and meat products are generally not allowed; neither is oestrogen residues in meat / meat derived foods.
- There are maximum levels for mycotoxins, with some specific levels for milk, infant formula, fruit and food containing fruit juice.
- Melamine must not exceed 1 ppm in powdered infant formula; 0.15 ppm in liquid infant formula; and 2.5 ppm in other foods.

4.2.3 Labelling Requirements

Labelling requirements for food are set out in the Food Regulations. It should be noted that:

- All food must be labelled according to the general labelling requirements of the Food Regulations. These are set out in Table 4-3.
- Some prepacked food must meet additional labelling requirements. These are set out in Table 4-4.
- Acceptable voluntary labelling information may also be included. This is limited to recipes and pictorial serving suggestions. They must be accompanied by the words “recipe” / “serving suggestion” (in English) in letters at least 1.5mm high.
- Nutrition, health and other claims may be made if requirements are met (brief overview provided in Table 4-5).
- The labelling requirements of the Food Regulations include standards for over 220 different types of food that must be met for the food to bear the corresponding name. While generally these standards are unlikely to cause any issues, it is worth double checking them as in a couple of rare cases the use of certain names on products intended for Singapore has caused issues. The Food

Regulations containing these standards can be found at the following address: <https://sso.agc.gov.sg/SL/SFA1973-RG1> . The standards are found in regulations 39-260.

Information on labels must be provided in English.

Table 4-3: General labelling requirements

Item	Description / notes
Name/description of food	Part IV of the Food Regulations contains requirements for terms used for common names Must be at least 1.5mm high.
Statement of ingredients	Complete list of ingredients, listed in descending order of weight. Must be at least 1.5mm high.
Declaration of foods/ingredients known to cause hypersensitivity.	This relates to the following foods and ingredients: (i) Cereals containing gluten; (ii) Crustacean and crustacean products; (iii) Eggs and egg products; (iv) Fish and fish products; (v) Peanuts, soybeans and their products; (vi) Milk and milk products (including lactose); (vii) Tree nuts and nut products; (viii) Sulphites in concentrates of 10mg/kg or more. The full list of ingredients considered to fall within the scope of each of the above products can be found in the Food Regulations. Declaration can either be made in the statement of ingredients or using a “contains” / warning statement. Must be at least 1.5mm high.
Declaration of net content	Volumetric measure (millilitres, litres) for liquid foods Net weight (grams, kilograms) for solid foods Either weight or volumetric measure for semi-solid foods such as yoghurt Must be at least 1.5mm high.
Name and address of local producer / importer	For imported foods: local importer, distributor or agent. Must be the physical address.
Country of origin of food	Country must be specified; name of city, province or similar is not sufficient.

Table 4-4: Additional labelling requirements

Item	Description / notes
Expiry date	Applies to prepacked products listed under the second schedule of the Food Regulations. In summary this is: dairy, fruit and vegetable juice, infant foods, tofu, flour, breakfast cereal, chocolate, certain sauces, raisins and sultanas and any food stored chilled.
Advisory statements for food containing certain sweetening agents	For product containing certain sweetening agents (e.g. acesulfame-K, saccharin, etc.) added at the maximum permissible levels.
Labelling of Special Purpose Foods	For products formulated to cater for the special dietary needs of specific groups of consumers, e.g. sugar-free foods, low-calorie foods, diabetic foods, diabetic foods. Special suitability must be indicated, and nutritional labelling requirements met.

Nutrition labelling	Applies to any food making nutrition claims or permitted health claims. Must contain energy, protein, fat and carbohydrate contents of the food. The levels of the nutrient indicated in the nutrition claim must also be declared.
Category specific labelling	For certain products such as irradiated food, milk, fruit wine, and pre-packaged edible fats and oils. For example, pasteurised and UHT milk must be date marked; Where these exist, they are included in Part IV of the Food Regulations (N.B. most provisions in Part IV relate to the requirement of products for the use of common names, rather than labelling requirements specific to that product.
Advisory statements for certain ingredients	Warning label for products containing certain ingredients such as e.g. royal jelly or aspartame.

Table 4-5: Nutrition, health and other claims

Item	Description / notes
Nutrition claim	Suggests nutritive properties (e.g. sugar free, high in vitamin C) SFA's vitamin and nutrient calculator provides advice on when these claims may be used https://www.sfa.gov.sg/tools-and-resources/vitamins-and-nutrients-calculator
Health claim	Three types: nutrient function, other function and nutrient specific diet related. A list of approved health claims can be found in the SFA guide on labelling and advertisements (see box below) A procedure exists for applying for new health claims. The application form can be found at: https://www.sfa.gov.sg/docs/default-source/e-service/food/applicationforuseofnewhealthclaimsforfoodintendedforsaleinsingapore-v1-0
Other claims	Organic – requiring certification from a system complying with conditions set out in Codex guidelines. Gluten free – must meet the conditions set out in the Codex Alimentarius standard.

Guide from the SFA on labelling and advertisements

The SFA publishes a comprehensive guide for food labelling and advertisements. This can be found, in English, at the following address.

<https://www.sfa.gov.sg/docs/default-source/default-document-library/a-guide-to-food-labelling-and-advertisements.pdf>

Healthy choice symbol

Singapore has introduced a healthy choice symbol for packaged food products, which aims to help consumers identify the healthier options. This symbol can currently be found on about 3 500 different products.

It is necessary to apply in order to use the symbol. There are guidelines to help determine whether a food product may be eligible to bear the symbol. These can be found at: [https://www.hpb.gov.sg/docs/default-source/default-document-library/hcs-guidelines-\(january-2018\)9ab599f6468366dea7adff0000d8c5a.pdf?sfvrsn=2d36ff72_0](https://www.hpb.gov.sg/docs/default-source/default-document-library/hcs-guidelines-(january-2018)9ab599f6468366dea7adff0000d8c5a.pdf?sfvrsn=2d36ff72_0)

More information on the symbol more generally can be found at: <https://www.hpb.gov.sg/food-beverage/healthier-choice-symbol>



Organic and halal certifications in Singapore

The SFA does not have a definition of **organic**, and there are no organic certification bodies in Singapore. In the absence of a national definition or certification system, the Food Regulations set out how organic is define. More specifically they state that food can only be labelled as “organic” if it has been certified as “organic” under an inspection and certification system that:

- Complies with section 6.3 of the Codex Guidelines for the Production, Processing, Labelling and Marketing of Organically Produced Foods, GL 32-1999 (Codex Guidelines); or
- That substantially complies with section 6.3 of the Codex Guidelines and is acceptable to the SFA as being a suitable system for the certification of organic food.



Halal certification in Singapore is governed under Section 88A of the Administration of Muslim Law Act (AMLA). The certification system is managed by the Islamic Religious Council of Singapore (MUIS), and it is strongly recommended to consult the MUIS website for more information on requirements, fees, etc.

<https://www.muis.gov.sg/halal/>

4.2.4 Protection of intellectual property rights, including geographical Indications (GIs)

IPR protection framework

The Intellectual Property Office of Singapore (IPOS) is the body responsible for IP registration in Singapore. The IP legal framework in Singapore is generally considered to be comprehensive, robust and among the most developed in the region. Singapore has signed up to several conventions on intellectual property, including the Paris Convention for the Protection of Industrial Property and the Madrid Agreement concerning the International Registration of Marks.

Trademarks can be registered under the Trademarks act through IPOS. In 99% of cases, IPOS issues IP registrations for trademarks within 12 months of application. Applications can be made online through the ip2.sg service portal of IPOS (<https://www.ip2.sg/>). Protection lasts for 10 years and can be renewed.

Singapore works on a first to file system for IP in general, meaning the first person to file a right in Singapore will own that right once the application has been granted.

Searching for registered IP

Intellectual property registered in Singapore can be searched online through the following portal:

<https://www.ip2.sg/RPS/WP/CM/SearchSimpleP.aspx?SearchCategory=ip>

Singapore's GI system

A new framework for registering geographical indications (GIs) was introduced in Singapore in 2019, spurred by the EU Singapore FTA. This new framework included the establishment of a new GI registration system and registry. It also enhanced protection of GIs, with registered GIs protected against unauthorised use even if this misuse does not mislead the public as to the true geographic origin of the goods. New border enforcement legislation will also enable customs authorities to stop goods with suspected infringements at the border. Prior to the establishment of this new framework, GIs could only be protected as trademarks through the Trademark act.

Forms for the application to register geographical indications, along with detailed guidelines on the filing process can be found at the following address:

<https://www.ipos.gov.sg/resources/geographical-indication>

The application process itself costs SGD 1 000. Other processes relating to GI protection (including some which may occur during the registration process) have their own forms and fee rates, which can be found on the same webpage. Protection is valid 10 years and can be renewed.

It should be noted that the legislation in Singapore allows for the permanent challenge of GIs by any interested third party. This means that GI protection does require close monitoring. Three cases of challenges (through requests for 'Qualification of Rights') have arisen to date; these concern Prosecco, Feta and Parmigiano. The EU-FTA, which entered into force on 21 November 2019, shall provide for additional protection of European GIs in Singapore.

Under the EU-Singapore FTA, 196 European GIs were initially shortlisted for protection, and at the time of writing, 139 GIs have finally been registered in Singapore and 138 are also protected through the FTA. A full list of these is presented in section 9. It should be noted that this situation is dynamic with the potential for the number of protected GIs to increase if more on the shortlist finalise fee payment and registration procedures.

In addition to the GIs listed in the FTA, some GIs such as St Emilion Grand Cru have independently registered for protection.

The European PDO/PGI label has also been registered as a trademark in Singapore, effectively restricting its use to European PDO/PGI products (whether with or without a GI protected in Singapore). This means the logo is more visible to consumers, and considerable further work has been performed in Singapore to boost understanding of geographical indications.

4.2.5 Relevant authorities for IPR and GI protection and further contacts

<p>Intellectual Property Office of Singapore 1 Paya Lebar Link, #11-03 PLQ 1, Paya Lebar Quarter Singapore 408533 ☎ (+65) 6339 8616 ✉ ipos_enquiry@ipos.gov.sg 🌐 https://www.ipos.gov.sg/ Online portal for IPOS services: https://www.ip2.sg/</p>
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4.3 International trade

4.3.1 Singapore and foreign trade

Singapore maintains one of the most liberal trading regimes and is one of the most open economies in the world. With a small domestic market and limited natural resources, Singapore was forced to adopt pro-trade policies that allow it to integrate within the global economy quickly into its national development. The Ministry of Trade and Industry (MTI) of Singapore has the primary responsibility for trade policy in Singapore.

4.3.2 Key trade agreements, present and future

As a consequence of Singapore's open market approach, the country has signed free trade agreements with 43 trading partners. Key ones are presented in Table 4-6.

Table 4-6: Chronological list of Singapore trade/economic agreements with third countries/regions

Partners	Type of agreement	Entry into force
ASEAN Free Trade Area	Free Trade Area	1993
Japan	Economic Partnership Agreement (JSEPA)	2002
Australia	Free Trade Agreement	2003
EFTA (Iceland, Norway, Liechtenstein and Switzerland)	Free Trade Agreement	2003
USA	Free Trade Agreement	2004

Partners	Type of agreement	Entry into force
Brunei, Chile, New Zealand	Trans-Pacific strategic economic partnership	2006
Panama	Free Trade Agreement	2006
Korea (a)	Comprehensive Economic Cooperation Agreement	2007
China	Free Trade Agreement	2009
Peru	Free Trade Agreement	2009
India (a)	Comprehensive Economic Cooperation Agreement	2010
Australia, New Zealand (a)	Free Trade Agreement	2010
Costa Rica	Free Trade Agreement	2013
The Gulf Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates)	Free Trade Agreement	2013
Taiwan	Free Trade Agreement	2014
Turkey	Free Trade Agreement	2017
Sri Lanka	Free Trade Agreement	2018
The European Union	Free Trade Agreement	2019

(a) Signed under the ASEAN umbrella.

Source: Agra CEAS based on Asia Regional Integration Centre, <https://aric.adb.org/fta-country>

Driven by the considerations set out in section 4.3.1 above, Singapore has reached out and signed FTAs with countries from across the world. The country is continuing this trend throughout its current negotiations with:

- **Regional Comprehensive Economic Partnership**, with Australia, Brunei Darussalam, Cambodia, China, India, Indonesia, Japan, Korea, Lao PDR, Malaysia, Myanmar, New Zealand, Philippines, Thailand and Vietnam. Negotiations were launched in 2013.
- **Eurasian Economic Union (EEU) - Singapore Free trade agreement**; free trade agreement between the countries of Singapore and Armenia, Belarus, Kazakstan, Krygyzstan and Russia.
- **Singapore-Canada FTA**
- **Singapore – Mercosur FTA**
- **Singapore –Mexico FTA**
- **Singapore-Pakistan FTA**
- **Singapore – Ukraine FTA**

On top of that, in the long term, Singapore is likely to start negotiating, or be involved in the negotiations of the following agreements:

- East Asia Free Trade Area (ASEAN+3),
- Comprehensive Economic Partnership for East Asia (CEPEA/ASEAN+6),
- ASEAN-Pakistan Free Trade Agreement,
- ASEAN-Eurasian Economic Union Free Trade Agreement,

- ASEAN-Canada FTA,
- Free Trade Area of the Asia Pacific,

4.3.3 EU- Singapore Free Trade Agreement (EUSFTA)

The EU-Singapore Free Trade Agreement (EUSFTA) is the first FTA signed between the European Union and an ASEAN nation. Negotiations began in 2009 and entered into force ten years later on the 21st of November 2019. As soon as the EUSFTA entered into force, EU exports to Singapore became mostly fully liberalised. Before the agreement almost all goods from the EU could already enter Singapore free of customs duties, and this agreement cements that agreement and relationship.

The FTA is set on the backdrop that the EU and Singapore continue to implement the high standards set to goods entering their respective markets. The FTA also includes the principal of non-discrimination which sets that:

- Fundamental Rules of the WTO such as the principle of national treatment so that foreign goods are treated the same as domestically produced ones
- It prevents either partner from introducing new restrictions on imports and exports; and eliminates non-tariff measures on goods such as automobiles, electronics and pharmaceuticals and all agri-food products.

The EU and Singapore will strengthen cooperation in customs procedures. They have agreed on basic principles for simplifying, harmonising, standardising, and modernising procedures to reduce costs for businesses. Furthermore, the process of countries applying for approval for meat exports will be streamlined, with time limits applicable to the application process and prelisting for establishments to apply.

Furthermore, under the EUSFTA, 196 well-known **European food and drinks geographical indications (GIs) were initially listed for protection on the Singaporean market, of which 139 have finally been registered for protection at the time of writing, though this situation is fluid and more may still be registered.** This will benefit European farmers and small businesses producing these traditional products. Notable examples of GIs that will receive protection are:

- Alcoholic beverages: *Douro, St Emilion, Priorat*
- Dairy: *Danablu, Queso Manchego, Roquefort*

A full list of GIs that were listed for protection in Singapore under the FTA, along with those which have been finally registered at the time of writing is available in section 9.

Current import duties and taxes for the export of food to Singapore can be consulted here:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi

4.3.4 WTO disputes and other trade barriers

Singapore is currently involved in one WTO dispute. This lack of disputes can most likely be attributed to Singapore's long history as an open market trading hub which benefits from the ideals of the WTO. The sole dispute is the **lack of sufficient IPR protection rights except for Geographic Indications**. The Singapore Copyright Act provides for equitable **remuneration to performers** only for direct broadcasting, but explicitly precludes the paying of remuneration for other ways of communication to the public (for instance for music played in public).

Further information, as well as an up to date list of trade barriers can be found here:

https://madb.europa.eu/madb/barriers_crossTables.htm?isSps=false#letter-s

4.3.5 Summary of key trade barriers

As many of the standards set by the Singaporean government are compatible with or similar to the standards set by the EU, and so European companies should have few challenges in accessing the Singaporean market. The signing of the EUSFTA agreement brings down some of the last barriers to trade with Singapore although it is important to note that many products have been tariff free when entering Singapore for a long time from the EU. The trade agreement also guarantees protection to several EU geographical indicators in the Singaporean market. The trade agreement is therefore expected to boost trade between the EU and Singapore and should benefit key EU food and beverage products. For a full list of GI products protected under the EUSFTA please refer to section 9.

4.4 Operating in the Singaporean food and beverage market

4.4.1 Logistical services and transportation infrastructure

Singapore is a strong player in logistics and transportation due to its world/class logistics infrastructure, global connectivity, efficient customs handling, liberal taxation policies and the rise of the ASEAN region. The World Bank ranked the country to be the fifth best Logistics Hub in 2014 (after Germany, The Netherlands, Belgium and the UK).²⁵

Shipping

Due to its maritime and historically strategic location (see section 2.1.1), Singapore's seaport connectivity is high. The harbour is connected to 600 ports in 123 countries through 200 shipping lines and thus, reaches every important port in the world every day. Every year approximately 130 000 ships reach the country, which makes it the world's leading transshipment port. Singapore's first Container terminal was built in 1969 in Tanjong Pagar and pushed the country into the global league. In fact, this was the first container port in Southeast Asia. The port has grown and evolved since it was first built; continues to do so today; and will further change in the future. Currently the **Pasir Panjang Terminal** has a capacity of 34

²⁵Logistics Industry Singapore https://www.abh-ace.be/sites/default/files/downloads/BFTA%20-%20Logistics%20Industry%20in%20Singapore%20BD_nl.pdf

million TEUs and several city terminals (e.g. **Tanjong Pagar, Brani and Keppel Terminals**) accounts for a capacity of 16 million TEUs. The location of the ports and terminals are depicted in Figure 4-1.

The new **Tuas Terminal** will be built by 2040. This new terminal has a planned capacity of up to 65 million TEUs and will equip Singapore with a single and contiguous location, which will provide better economic scale as well as it eliminates the need for inter-terminal haulage. Furthermore, this new port is an indication that Singapore believes it can keep up with its growth in the long term.²⁶

Air freight

Singapore's **Changi Airport** (location depicted in Figure 4-1) is the country's main civilian airport and one of the biggest transportation hubs in Asia. The airport is about 20km away from the city centre and located in Changi. It is ranked first in Global Air Cargo Airport for performance, value and facilities and for several years it is ranked the world's best airport by Skytrax since 2013. Moreover it is one of the busiest airports by cargo traffic globally - in 2017, the airports airfreight shipments first surpassed the 2 million tonnes per year mark which makes it the 13th biggest cargo airport worldwide. However, since then shipments have fallen to under 2 million tonnes again. The airports key markets and destinations are mainly situated in Asia.²⁷

²⁶ Connecting to the World: Singapore as a Hub Port <https://www.csc.gov.sg/articles/connecting-to-the-world-singapore-as-a-hub-port>

²⁷ The 15 best airports in the world, ranked <https://www.businessinsider.com/best-airports-world-2019-skytrax-2019-3?r=US&IR=T>; Changi breaks through the 2m cargo tonnes barrier in 2017 <https://www.aircargonews.net/cargo-airport/changi-breaks-through-the-2m-cargo-tonnes-barrier-in-2017/>; CARGO We are one of the world's busiest airports for international air cargo <http://www.changiairport.com/corporate/partnerships/cargo.html>

Figure 4-1: Major International cargo airports, ports and terminals in Singapore



Source: Agra CEAS based on various

Rail freight

Singapore being a city state mainly limits the railway to people's transportation within the city. Cargo rail freight is not really a topic, which makes this way of transport uninteresting due to the country's small size. There are plans to build a high speed rail link connecting to the Malaysian capital Kuala Lumpur, though mostly for passenger transport.²⁸

Road Freight

The road network is highly urbanised. Most parts of Singapore, including Sentosa and Juro island are reachable by road. Within the transport and storage services industry, land transport made up over 12 % of the sector.²⁹ The Johor-Singapore Causeway is a road link between Singapore to Malaysia.³⁰ According to government statistics there were 9 081 lane km of roads in 2012, which accounts for 12% of all available space in Singapore. New road connections will especially focus on further increasing connectivity while keeping in mind the limited space available.³¹

²⁸ Singapore-Malaysia rail projects to boost connectivity, create thousands of jobs <https://www.straitstimes.com/singapore/singapore-malaysia-rail-projects-to-boost-connectivity-create-thousands-of-jobs>

²⁹ Transport and storage services industry <https://www.singstat.gov.sg/modules/infographics/transport-and-storage>

³⁰ The Causeway https://eresources.nlb.gov.sg/infopedia/articles/SIP_99_2004-12-30.html

³¹ <https://www.mot.gov.sg/About-MOT/Land-Transport/Motoring/Road-Network/>

Waterway freight

Singapore is only a small city-state with and therefore does not have major rivers. The biggest rivers originally were a few kilometres long (Sungei Kranji, Sungei Seletar, Sungei Kallan and the well-known Singapore river). Most rivers have been changed into canals and especially the Singapore River has been used for trade for almost over a century, since British colonial times (see section 2.1.1). However, this method of transport is not really of interest for European exporters.³²

4.4.2 Distribution

4.4.2.1 Retail channel overview

The retail industry in Singapore contributes about 1.4 percent to the GDP and employs three percent of the country's workforce.³³ Food consumption in Singapore is driven by its urban setting, lots of disposable income available and by stable consumer spending. Those three factors are important for Singapore's multi-billion-dollar food industry.³⁴ Most Singaporeans rely on hypermarkets and supermarkets, but some still prefer smaller more local shops and wet markets.

Hypermarkets

Superstores with large retail facility, combining supermarket and department store. They typically sell lots of different products from different branches ranging from regular groceries to merchandise products. Some well-known Hypermarket chains in Singapore are **Giant Hypermarket** and **Fairprice Xtra Hypermarket**.³⁵

Supermarkets

Normally these markets are cheaper than Hypermarkets and focus on selling food items, but also other consumer items. The following two big supermarket chains are dominating the retail market in Singapore: **Dairy Farm International Holdings Ltd** and **NTUC Fairprice**. The two chains target different consumer types. Dairy Farm International Holdings own Cold Storage brand stores try to reach middle- and higher-income consumers. The general mass-market on the other hand is being targeted by NTUC Fairprice, which also currently has the lead within the Singaporean food industry (approximately 30% of market share in 2015). Yet, according to the number of supermarkets Dairy Farm International Holdings wins with 123, which commonly sell European western-type products amongst other things. NTUC own about 100 supermarkets in Singapore. The largest cheaper and independently managed supermarkets are **Sheng Siong** and **Prime**, with their products originating mostly from China.³⁶

³² The DNA of Singapore – River <https://lkcnm.nus.edu.sg/dna/habitats/details/14>

³³ The shifting trend of retail in Singapore <https://www.guidemesingapore.com/business-guides/industry-guides/retail-industry/the-shifting-trend-of-retail-in-singapore>

³⁴ Retail Foods: Singapore, United States Department of Agriculture (2019)

³⁵ The best grocery stores, supermarkets and markets in Singapore <https://www.timeout.com/singapore/shopping/the-best-grocery-stores-supermarkets-and-markets-in-singapore>

³⁶ Singapore Country Profile <https://www.foodexport.org/get-started/country-market-profiles/southeast-asia/singapore-country-profile>

Department Stores

These stores sell all kind of different products from hardware over furniture to food. Some examples of Department stores in Singapore are **Robinsons Group** and **Metro**.

Discounters

Like the department store, it sells a variety of products, although at cheaper prices usually. Some discounters try to focus on some special products. Discounters in Singapore are e.g. **Mustafa Centre** and **Mega Discount Store Pte Ltd**.

Convenience Stores

Small shops, that can be found close to residential areas, at road corners or gas stations. Those shops normally sell everyday supplies and some of them are open all day long. Convenience store chains situated in Singapore are **7eleven** and **Cheers**.

Wet markets

A wide variety of fresh products can be found on wet markets and prices are generally lower than in supermarkets.³⁷ A big share of food items such as vegetables, fish, eggs, chicken, seafood and pork are sold on wet markets.³⁸ Traditional wet markets in Singapore are **Kebun Baru Market**, **Geyland Serai Market**, **Chong Boon Market**, **Tekka Market**, **Marine Terrace Market**, **Holland Village Market** and **Tiong Bahru Market**.

Specialised stores

Specialised shops are mostly situated in bigger malls and sell one kind of products such as alcohol or sweets.³⁹

E-commerce

Due to growing costs, less instore sales often caused by the growing demand for e-commerce, traditional stores in Singapore are struggling. In recent years, big international brands like Carrefour, and Banana Republic had to close their Singaporean stores. The same happened and still does happen to different local stores. However, the retail decline does not mean Singaporeans consume decreased, on the contrary, however, it demonstrates a shift to e-commerce. 97% of the Singaporean population owns a smartphone.⁴⁰ Already in 2014, a survey by Visa showed that Singapore is the top country in Southeast Asia, when it comes to online shopping.⁴¹ Another report by Google and Temasek Holdings suggests

³⁷ Wet Markets in Singapore <https://www.angloinfo.com/how-to/singapore/lifestyle/shopping/markets>

³⁸ Importing Food Products into Singapore <https://www.guidemesingapore.com/business-guides/industry-guides/restaurant-and-food-industry/importing-food-products-into-singapore>

³⁹ Singapore: Distributing a product <https://santandertrade.com/en/portal/analyse-markets/singapore/distributing-a-product>

⁴⁰ Report: Shoppers in Singapore are primed for experiential retail <https://www.adyen.com/blog/report-shoppers-in-singapore-are-primed-for-experiential-retail>

⁴¹ The shifting trend of retail in Singapore <https://www.guidemesingapore.com/business-guides/industry-guides/retail-industry/the-shifting-trend-of-retail-in-singapore>

Singapore's e-commerce sector to increase to EUR 5 billion by 2026.⁴² According to research 3/4th of Singaporeans search for products online and out of those, more than 70% ordered goods overseas before.⁴³

Experimental and activity-based retail

The decline in in-store retail does not mean the market will only focus on e-commerce in the future. Singapore is primed to try new and innovative experimental concepts offered stores and shopping malls, to motivate customers to come and buy directly in store.⁴⁴ Some places now offer permanent access, 24h a day, community areas with indoor or urban rooftop farms or activities such as indoor rock-climbing or indoor cycling.⁴⁵

4.4.2.2 Intermediaries

As a result of the small size of the Singapore market in population terms, the supply chain in Singapore is generally more straightforward and direct than in many other countries. The direct exports of European products are possible especially to bigger supermarket chains and some up-market retailers; the former in particular is possible if a company produces a wide range of products. Biscuits, snack products, juices, jams, confectionery, salad dressings, pre-packed deli meats and fresh fruit can all be exported directly to supermarkets (and any other product as long as its volume allows direct shipment).

Importer/distributors nonetheless generally play an important role in helping imported foods reach shop shelves in Singapore, as they will deal with distribution to wholesalers and retailers. These intermediaries typically focus on a specific type of product (e.g. alcohol). Other products local importers often specialise in are dry groceries tropical fruit, frozen chicken, beef as well as local sauces. In general, importers can be anywhere in the city-state. Smaller retailers usually acquire their products from local distributors.⁴⁶

The food service channel and processing industry typically work with more dedicated suppliers or centralised food suppliers/markets such as FNBmarket (<https://www.fnbmarket.com/>).

Intermediaries and the South East Asia Region

As previously noted, Singapore is a notable regional hub for many food and beverage products. This is particularly true for alcoholic beverages, though it extends to some other products as well. Subsequently, there are some companies which not only import for the Singapore market, but also re-export to neighbouring countries. Looking at some specific product:

⁴²S'pore e-commerce market will grow to S\$7.5b in 10 years: Report <https://www.todayonline.com/business/google-temasek-see-s-e-asia-web-economy-reaching-us200-billion>

⁴³ Who are Singapore's online consumers? <https://janio.asia/articles/who-are-singapore-s-online-consumers/>

⁴⁴ The rise of experiential and activity-based retail <https://www.businesstimes.com.sg/hub-projects/property-2019-september-issue/the-rise-of-experiential-and-activity-based-retail>

⁴⁵ Singapore malls offering experiential concepts to attract returning customers: Edmund Tie <https://www.businesstimes.com.sg/real-estate/singapore-malls-offering-experiential-concepts-to-attract-returning-customers-edmund-tie>

⁴⁶ Singapore Country Profile <https://www.foodexport.org/get-started/country-market-profiles/southeast-asia/singapore-country-profile>

- For **alcoholic beverages**, these companies are larger, long established companies with strong cashflow to purchase inventory, and good infrastructure for re-export.
- For **meat**, these companies generally have operations in meat processing for halal meats. It is important to remember that neighbouring countries such as Malaysia and Indonesia have strong Muslim populations, meaning halal certification is important. Companies engaged in this area will have to be able to ensure halal certification to comply with the re-export markets as well as Singapore.
- For **fruit, vegetables, dairy, confectionery and olive oil**, overall there are fewer companies that engage in regional re-export, as in general there is a fairly high level of regional supply of these products. Nonetheless, a few companies which re-export to the region do exist.
- **Higher end products requiring the cold chain** may pass through Singapore in order to leverage the country's cold chain and higher skillset for some elements of food processing (such as butchery skills). They tend to then be sent on to higher end regional retail markets.

As a general rule, when considering the use of Singapore as a gateway to the wider south east Asia region, it is necessary to remember the following:

- Countries in the region are different from each other and regulations can be complex. As well as regulatory, cultural and linguistic differences, each country in the region is at a different stage of market maturity; therefore, while e.g. some imported fruit may do well in Singapore the market for it may be more lacking e.g. in Indonesia.
- Following on from the above, even if Singapore is being used as a gateway, it may be worth looking for local counterparts in the different countries, or at least ensuring any company re-exporting has local partners on the ground with whom it is also possible to interact directly. This will help with adapting to some of the differences between countries outlined above.
- As a gateway to the south east Asia region, Singapore is one of the top destinations for MICE (Meetings, Incentives, Conferences and Exhibitions); and subsequently companies from the broader region may attend MICE, providing an opportunity to be in contact with them.
- Singapore is nonetheless a country with high rental and workforce costs. Indeed, it can be difficult to hire blue collar workers. This can affect the economics of sending products through Singapore.

Volumes

Local retailers and importers will generally expect a minimum quantity or weight (MOQ) on a fortnightly or monthly basis. Common indicative MOQs for selected products are provided in below. It should be emphasized that these are indicative, and that each retailer or importer that expects an MOQ will have their own expectations that may be higher or lower.

Table 4-7: Common indicative fortnightly/monthly equivalent MOQs for selected products

Product / end market	Local food service	Local retail	Regional re-export
Wine (<i>case of 12 bottles</i>)	5-6	10	100
Spirits (<i>case of 12 bottles</i>)	2-3	10	50
Beer (<i>carton of 330ml bottles</i>)	50	200	1200

Product / end market	Local food service	Local retail	Regional re-export
Chocolate	1kg	50 packets	1000 cartons
Dairy (cheese)	1kg	200 cartons (of 6 pieces)	
Fresh F+V	5kg	10 crates	
Olive oil	5kg	10 cartons of 6 bottles	

Source: Agra CEAS / Euromonitor International research

Final considerations

Some general dos and don'ts for conducting business are set out in section 7.2, and these can be extended to any business conducted with intermediaries. Some further considerations for dealing with intermediaries are as follow:

- Personal contacts are important and strong business relationships tend to develop over years.
- Try to be transparent and communicative with Singaporean partners so that they understand your progress with any obligations on your side. It is generally expected that any terms which are agreed are adhered to and fulfilled in their entirety.
- Try to identify your target consumer and develop your understanding of them so that this can be discussed with any intermediaries you work with. Section 5 provides a starting point for this.

Business Contact Database:

A database of importers, wholesalers, retailers and distributors can be found in [section 8.5](#)

N.B. due diligence will have to be performed for any contacts on this database as no warranty is given as to the standing of these individuals, organisations or firms and no corresponding responsibility or liability is accepted by the authors.

4.4.3 Business environment

Singapore has a pro-business friendly environment, due to its well-organised legal system, exceptionally well-trained workers, advanced shipping and logistics industries, nice living environment and political and economic stability (as already seen in section 2.1.2). Internationally, Singapore has been and still is ranked as a place with an excellent business environment, which is progressively boosting its reputation. According to the World Bank the city-state is the easiest place to conduct business worldwide; and has been for the last 8 years.⁴⁷

Businesses usually are open between 8:30 in the morning and 5 in the evening; from Monday to Friday. Government agencies and most private sector companies are closed on Saturday. However, shops remain open every day from 10 a.m. to 9 p.m.⁴⁸ Taxes are generally lower than in many other countries. The highest individual income tax rate is 22%, while the maximum corporate tax rate is

⁴⁷ Pro-Business Environment <https://www.mpa.gov.sg/web/portal/home/maritime-singapore/what-maritime-singapore-offers/pro-business-environment>

⁴⁸ Singapore: Business Environment <https://santandertrade.com/en/portal/establish-overseas/singapore/business-environment>

17%. Thus, the complete tax load equals 13.7% of total domestic income. Starting a business in Singapore is easy in procedural terms. Moreover, several subsidy programs are available for healthcare, transport and housing.⁴⁹

4.4.4 Key operational considerations and challenges: summary

Key challenges to bear in mind when operating in the Singaporean market are:

- Due to its big and exceptionally good connected port, shipping is one of the best options.
- Business is conducted in English.
- Singapore many different retail channels to choose from, suited for different products.
- There are no obvious challenges for entering the Singaporean market.

4.4.5 Other relevant information

4.4.5.1 Methods of payment in Singapore

The most common form of payment in Singapore are credit cards. European credit cards can be used, but it is more cost efficient to get an account at a local Singaporean bank. **DBS** and **ATM** are the major ATM networks. Sometimes credit card details are requested in advance of a payment, if the amount of money transferred is a bigger sum. European debit cards are accepted in many places as well. However, cash can be used everywhere as well and sometimes is the only payment method available. It is usually being used for smaller payments e.g. on wet markets.⁵⁰ For business to business payments, there is no one size fits all payment option. Moreover, many cashless payment options are available, which are mostly part of the Network for Electronic Transfers, short NETS. NETS is a domestic electronic payment service provider, set up by Singaporean banks back in 1985 to develop the national debit network. Its goal is to create a cashless society through:

- **NETS Cash Card** can be used to pay at retail stores, to pay phone bills, vending machines or car parks and can be bought at NETS service centre or 7eleven
- **NETS FlashPay** card can be used to pay for public transportation and at some selected gas stations as well as convenience stores.
- **NETS card** is a debit card issued by banks, when opening a bank account.⁵¹

4.4.5.2 Travel from the EU to Singapore

To travel to Singapore a passport that is valid for at least 6 more months at the time of departure is needed. All European Union citizens are allowed to visit Singapore for up to 90 days visa-free. However, to work in Singapore a valid pass is needed, which is usually referred to as work visa. There are many different work visas available to apply to and it is important to find the one that fits the purpose of work best.⁵²

⁴⁹ Singapore <https://www.heritage.org/index/country/singapore>

⁵⁰ Best methods of payment <https://www.justlanded.com/english/Singapore/Singapore-Guide/Money/Payment>

⁵¹ Methods of Payment in Singapore <https://www.internations.org/go/moving-to-singapore/banks-taxes/methods-of-payment-in-singapore>

⁵² Work passes and permits <https://www.mom.gov.sg/passes-and-permits>

Nonetheless, it is strongly advised that you contact the Singaporean embassy in your country well in advance of any travel to Singapore to confirm current visa requirements. They are also likely to provide the easiest way to obtain any required visa, even though an online e-visa application system exists (<https://www.ica.gov.sg/enteranddeparting/before/entryvisa>).

5 Market Snapshots for Selected Products

This section provides specific information for various food and beverage categories and products. This information covers three main categories:

- **Consumption:** data on the evolution of consumption; consumer profiles and any notable consumer trends;
- **Offer:** domestic production; imports and exports; the competitive landscape; relevant specific customs procedures/import considerations;
- **Distribution:** main distribution channels used; domestic and imported offer.

Furthermore, each category contains a SWOT analysis and a key takeaways message.

Fresh meat	Fresh fruit and vegetables	Dairy
Wine	Spirits	Olive oil
Chocolate and confectionery	Beer	Processed meat
Ice cream	Prepared baby food	Processed fruit and vegetables
Pasta	Baked goods	Biscuits and cereal bars

5.1 Fresh meat

5.1.1 SWOT analysis

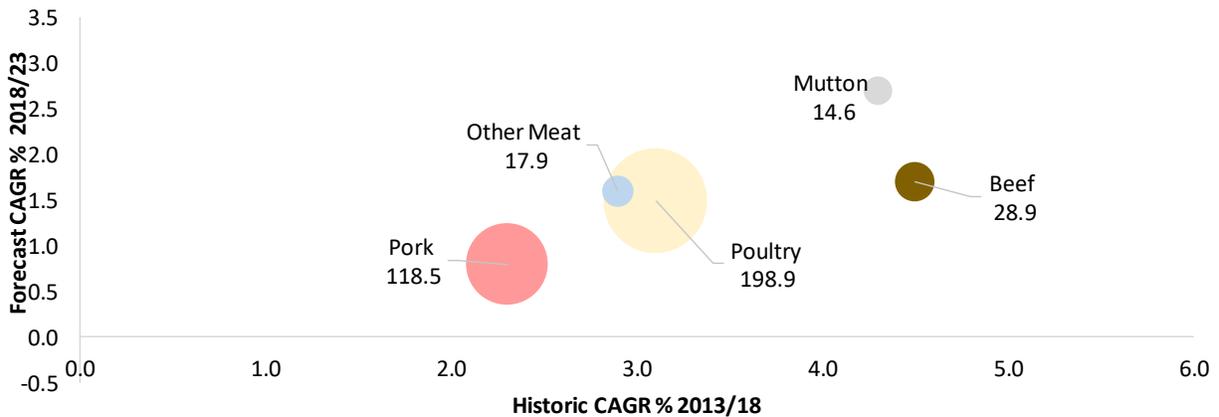
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Low domestic production means there is a strong structural shortage of meat. ▪ Consumption growing fairly strongly. ▪ Multicultural population means there is demand for a wide variety of meats and cuts. ▪ Market access requirements for EU producers less strenuous than for many other countries in the region. 	<ul style="list-style-type: none"> ▪ The small population and its heterogeneity subsequently create niches with small consumer bases (e.g. high quality beef cuts, halal meat etc.). ▪ To fulfil the preference for fresh meat, live animals are imported for slaughter in Singapore.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Opportunities across the board to some extent due to factors identified in <i>strengths</i> above. ▪ Increased recent focus on farming methods and animal welfare at the top end of the market. ▪ Some potential as a re-export hub. 	<ul style="list-style-type: none"> ▪ US, Brazil and Australia – all of which are geographically closer – have strong positions in the market. ▪ Increased interest in meat alternatives.

5.1.2 Consumption

5.1.2.1 Evolution of consumption

Poultry is the most popular meat in Singapore, accounting for around half of all meat consumption. Almost 200 000 tonnes were consumed in 2018, with consumption growing at 3.1% per year over the period 2013-18. Pork, which grew more slowly over the same period, comes in second place, with just under 120 000 tonnes consumed in 2018. Consumption of beef and mutton are both a fraction of the consumption of poultry or pork, at just under 29 000 and 15 000 tonnes respectively. The markets for these meats, however, did grow more quickly over the period 2013-18 at 4.5% and 4.3% respectively; and are forecast to grow more quickly than other meat types going forwards. There is a notable niche market for other meats in Singapore, with almost 18 000 tonnes consumed (Figure 5-1).

Figure 5-1: Evolution and forecast of fresh meat market (000 tonnes) in Singapore, 2013-2023; total volume



Source: Euromonitor International: Fresh Food, 2020.

5.1.2.2 Consumer profile and purchase criteria

Consumers

The various ethnicities and cultures in Singapore play a key role in defining the consumers of meat. Roughly 1/3 of Singaporeans are Buddhists, and while there are different schools of thought in the religion on the consumption of meat, certain schools do believe in vegetarianism. Therefore, while not all Buddhists are vegetarian, a notable part of this population are; and among Buddhists that eat meat, beef is generally avoided. Similarly, the 5% Hindu minority also avoid the consumption of beef. Furthermore, the consumption of pork is avoided by the roughly 1/6 of the Singaporean population which adheres to Islam. On the other hand, pork is a popular meat among ethnic Chinese Singaporeans. These cultural considerations combined, along with the limited space in Singapore for agricultural production (which therefore favours poultry) go some way towards explaining the position of poultry as the predominant meat in Singapore.

Secondly, while meat can be considered a staple in Singapore which is consumed by the majority of the population, income does play a role in the level of meat consumption. With the majority of consumed meat being imported, it can be expensive for low income earners, meaning that middle and higher income consumers are likely to consume more meat on average. While the reliance on imports to satisfy demand means that imported meat will be consumed by more or less all meat consumers, there are certain consumers who are more likely to consume higher value cuts or “exotic” meats such as veal and lamb shank. These consumers include:

- Higher income consumers, who may purchase wagyu beef, kurobuta pork or chicken breast from premium butchers.
- Singaporeans returning from overseas who may consume meats such as veal which are less consumed in Singapore.

- Youngsters who have been more exposed to western cuisine through the media and hence use more western style meats.

Drivers and method of consumption

As noted above, the ethnicities and cultures of Singapore’s diverse population are a notable driver of consumption. While chicken is very popular and accounts for the clear majority of poultry consumed, duck is also quite popular in Singapore influenced by Cantonese cuisine, and some exporters have identified a niche in this market. Expanding on the above, the different types of cuisine present in Singapore are also a notable driver of demand for meat. While many local dishes unsurprisingly rely on seafood given Singapore’s geographical situation, popular dishes with meat often use poultry. Haiwanese chicken rice, once of Singapore’s most popular dishes, generally uses whole chickens, while chicken cuts may be used in a variety of noodle and rice dishes as well as soup. Pork (belly and ribs in particular) may be featured in Cantonese dishes such as *chiar siu* and *bak kut teh*.⁵³

It should be noted that Singapore has a very well developed food service industry, and indeed over half of meat sales in Singapore occur through this channel, making it an important driver for consumption. The restaurant industry in Singapore includes some fine dining and Michelin starred restaurants which serve cuisine from a variety of countries and demand high quality imported meat. Some of these restaurants serve dishes based on more “exotic” meats or cuts such as veal or lamb shank.

Purchase criteria

Meat and cut type are key purchasing criteria for most consumers. The cultural differences referred to above will play a large role in the purchasing choice of many consumers (e.g. Chinese ethnicity Singaporeans will often look for pork. Price and intended use will play important roles for cut choice. Among the different types of meat, the most popular cuts overall are: pork – belly; beef – sirloin; chicken – varies, though breast popular among younger consumers.

Freshness is important for many consumers including most middle income ones. Fresh meat is generally 20% more expensive than frozen. That said, up to an estimated 40% of meat sold through retail channels in Singapore is sold as frozen. For higher income consumers, country of origin may be a consideration, as may farming practices. For lower income consumers, price is the main purchasing criteria (and this also impacts the cuts chosen, as noted above).

5.1.2.3 Recent market trends

Meat alternatives have been gaining attraction in Singapore in recent years, with the country towards among the most advanced in the region in this field. Quorn entered the market in 2015, and there are an increasing number of vegetarian or vegan food service outlets in the country. There are also innovative companies in the country such as ShioK Meat examining meat alternatives. This recent trend is putting downward pressure on meat consumption and is reflected in the lower levels of growth in volume

⁵³; <https://www.straitstimes.com/lifestyle/food/irish-ducks-all-the-rage-in-singapore-restaurants>;

expected going forwards.⁵⁴ Pork volumes, for example, are forecast to grow at only 0.8% per year over the period 2019-23; while poultry is forecast to grow at 1.5% per year over the same period. As well as meat alternatives, some consumers are showing increased interest in leaner cuts of meat as they become more health conscious.

One notable trend at the top end of the market is the rise of premium butchers in Singapore with the start of The Meat Club in Singapore in 2018. These butchers generally focus on premium cuts of meat farmed through sustainable practices (e.g. free-range chicken, meat cultivated in a hormone free environment, grass-fed beef, higher animal welfare products). There are now approximately 18 gourmet butcher brands in Singapore. Indeed, these premium butchers plug into a broader trend of sustainability of meat which is at the forefront of many consumers' minds.

At the same time and looking beyond the country alone, Singapore increasingly shows potential as a re-export hub for meat to the wider south east Asia region (as it is already commonly used for various other food and beverage products; alcohol in particular). Most notably, a new trade corridor between Singapore and Western China is being opened up which could greatly reduce transport times to this part of China for fresh foods such as meat.⁵⁵

Meat on retailers' shelves in Singapore

The price of meat inevitably varies on the type of meat and cut, as well as the quality/segment it targets. While difficult to generalise, economy meat will more generally retail at under SGD 10 per kg, premium meat at over SGD 35 per kg and mid-range in-between.

⁵⁴ <https://www.foodnhotelasia.com/are-southeast-asians-ready-to-consume-less-meat> ; <https://asia.nikkei.com/Business/Food-Beverage/Mock-meat-merchants-smell-16bn-opportunity-in-Asia-Pacific>

⁵⁵ <https://www.mla.com.au/news-and-events/industry-news/singapore-emerging-as-red-meat-intermodal-and-re-export-hub/> ; Euromonitor International: Fresh Food, 2020



Meat packaging tends to be of quite high quality, with brand, certifications, country of origin and expiry date all prominent (see above). In view of the large Muslim minority, the indication of halal (if compliant) or non-halal (if not compliant with halal requirements) is common; both on shelves and, in the case of halal also on the product (see below). Other differentiating factors, such as rearing methods, feed, etc are also often indicated; indeed for premium meats it is fairly normal that some differentiating factors are clearly communicated, and it can also be found on some mid-range meats. As Singaporeans tend to purchase meat every second day, smaller package sizes are quite common.



Pictures: © Agra CEAS / Euromonitor International, 2020.

5.1.3 Offer

5.1.3.1 Domestic production

Domestic meat production is constrained by the general factors limiting agriculture set out in section 2.3. The production of meat that exists is almost entirely focused on livestock that can be intensively farmed in the small area available – firstly poultry (around 100 000 tonnes produced), and secondly pork (around 20 000 tonnes produced). Indeed, livestock production in Singapore’s agrotechnology parks – the heart of Singapore’s agricultural production – is heavily weighted towards poultry production, with 48 of the 74 hectares used for livestock production dedicated to the poultry production of three farms.⁵⁶ There is a certain quantity of live animal trade into Singapore for slaughter; with live poultry generally being imported from Malaysia and live pigs from Indonesia.

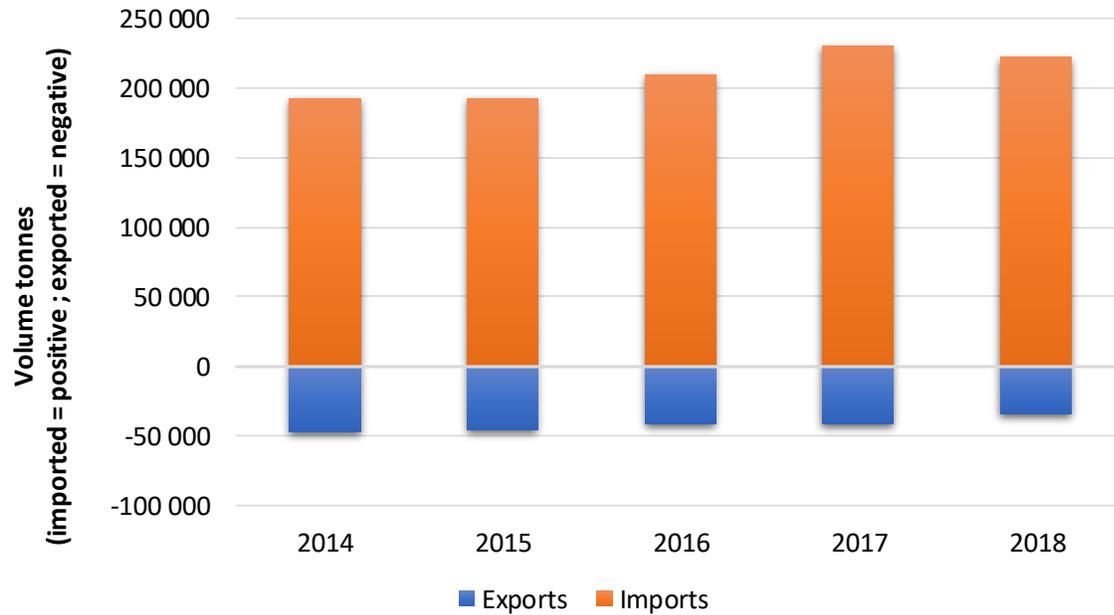
5.1.3.2 Imports and exports

As can be concluded from section 5.1.3.1, Singapore has a substantial structural shortage in meat, and hence must import significant quantities. As shown in Figure 5-2, these imports were just over 220 000

⁵⁶ <https://www.sfa.gov.sg/food-farming/food-farms/farming-in-singapore>

tonnes in 2018, compared to exports of under 35 000 tonnes (which can be assumed to be mainly re-export given the low quantities of meat domestically produced).

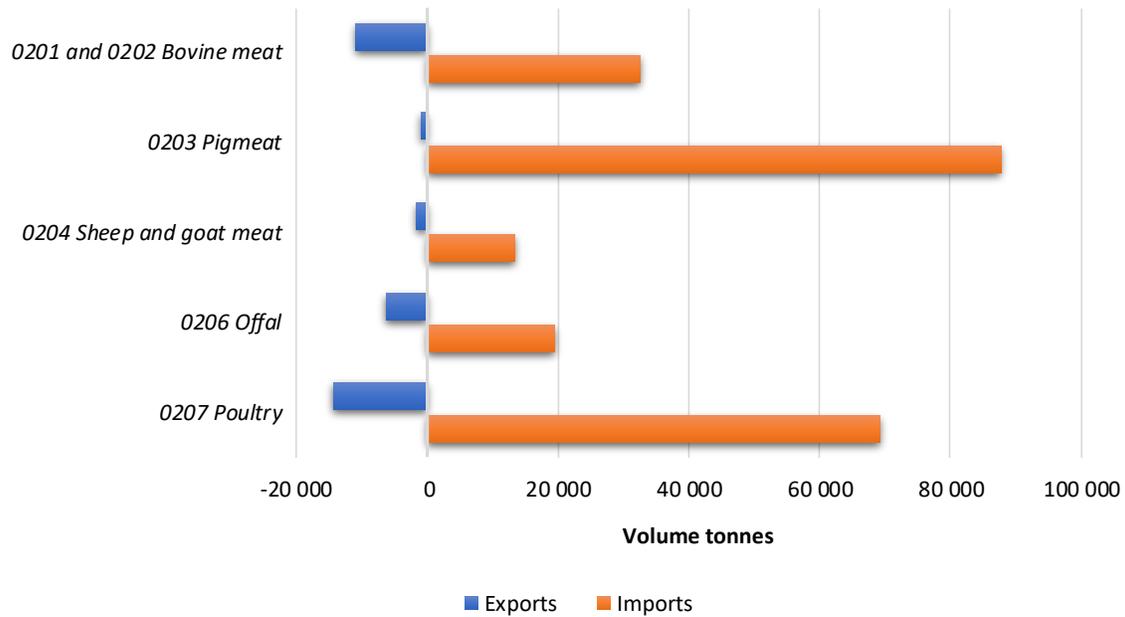
Figure 5-2: Trade balance (imports and exports) of fresh meat in Singapore, 2014-18; 000 EUR



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

Pig meat accounts for the greatest volume of exports, with almost 90 000 tonnes imported in 2018. Poultry meat follows with a bit over 70 000 tonnes imported (Figure 5-3).

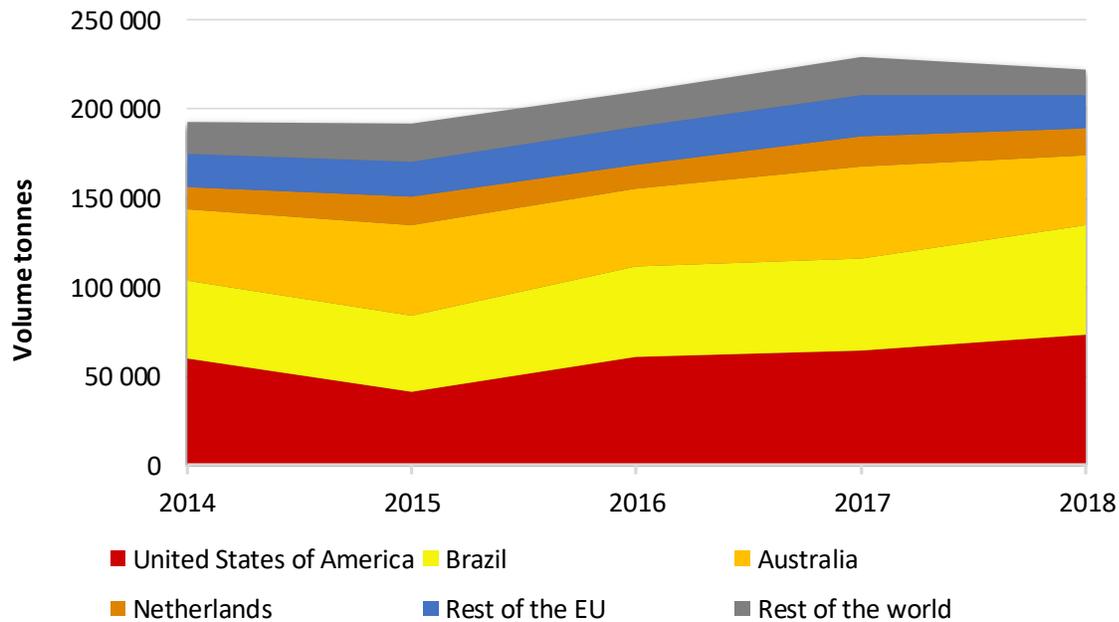
Figure 5-3: Trade balance (imports and exports) of fresh meat in Singapore, by type, 2018; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

In terms of source countries, the US and Brazil are the largest origins accounting for roughly 1/3 and 1/4 of imports respectively. The US dominates in poultry imports, while Brazil is of key importance for pork and beef imports. Australia is also an important source for meats other than poultry. The EU accounts for around 15% of imports; around half of this from the Netherlands (Figure 5-4).

Figure 5-4: Singaporean imports of fresh meat by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

5.1.3.3 EU GI products

No fresh meat products have been registered for protection under the EU-Singapore FTA.

5.1.3.4 Main competitors

Competition mainly comes from other importers: notably the US in the case of poultry; and Brazil and Australia in the case of beef, pork and the small sheep and goatmeat market. There is only notably competition from domestic producers in the case of poultry.

5.1.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, fresh meat in Singapore falls into the category of meat products; and as such must comply with the Sale of food act and the Wholesome meat and fish act.

Furthermore, countries must be approved before meat products can be exported. A list of accredited countries by product at the time of writing can be found at the following website:

<https://www.sfa.gov.sg/docs/default-source/tools-and-resources/resources-for-businesses/approved-countries.pdf>

Please note that the situation is constantly changing, and hence either the most recent version should be checked, or the ministry of agriculture in your Member State consulted.

Historically, overseas establishments also need to be accredited. Accreditation from the SFA can be applied for through the competent authority of the country in question. Two different forms exist: one for slaughterhouses / cutting plants (https://www.sfa.gov.sg/docs/default-source/e-service/food/application-form_slaughterhouse.docx?sfvrsn=161b1694_26) and one for canning / processing plants (https://www.sfa.gov.sg/docs/default-source/e-service/food/application-form_processingcanning.docx?sfvrsn=111b1694_21). However, under the EU-Singapore FTA, prelisting applies, meaning that the approved competent authority of the country for each member state may provide the list of establishments which comply with the requirements of the Singaporean authorities; and the Singaporean authorities have a set time frame of 40 days to approve these establishments without prior inspection, or to request extra information; any rejection will have to be justified).

A licence (valid 1 year) and import permit (per shipment) are required for the import of meat; and both of these incur fees. At the time of writing, these fees are SGD 84 per year for the licence and SGD 4.60 per 100kg for the permit.

In terms of tariffs, European fresh meat products do not face duties in Singapore.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by entering the corresponding CN code:
e.g. pork: <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=0203>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for fresh meat can be found on the website indicated in the box below; most notably, a veterinary health certificate is required.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website by entering the corresponding CN code:
e.g. poultry: <https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=0207&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of meat into Singapore are in line with international standards. However, there are a couple of challenges that EU exporters should be aware of:

- **Regionalisation:** in principle, regionalisation is accepted by Singapore. However, ultimately applications for regionalisation have to be made on an outbreak by outbreak basis so treatment and/or acceptance may vary between cases; and the method of regionalisation employed may differ from that used by the EU (e.g. a larger area may be regionalised). There are commitments under the EU Singapore FTA to further discuss the issue of regionalisation with an aim to further simplify it.

- **Born/raised/slaughtered:** Singapore effectively only accepts meat from animals which are born, raised and slaughtered in the same country. Discussions on this issue remain ongoing.

Furthermore, as outlined above a veterinary health certificate is required.

Up to date information on appropriate documents concerning SPS measures and provisions for meat can be found at:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=0201&countryid=SG#h16>

Labelling

Prepacked fresh meat products must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. Fresh meat can only be identified as such if no part of it has been frozen; while frozen meat must have been kept at under -18 degrees centigrade with the temperature never exceeding -12 degrees centigrade. As it is a product which needs to be stored at a chilling temperature to maintain or prolong its durable life, prepacked fresh meat requires date marking (as also set out in section 4.2.3).

5.1.5 Distribution

The **food service** channel plays an important role for meat distribution in Singapore, with around 60% of all meat sales occurring through this channel. While food service channels use a variety of meats, overall it is more common to find premium cuts (e.g. Wagyu beef, dry aged beef, kurobuta pork) through food service channels than through retail ones.

Among **retail** channels, the main channels through which meat is sold are:

- **Supermarkets**, which have grown greatly in importance in recent years and generally offer the widest range of meat products (fresh and frozen)
- **Wet markets**, which are estimated to account for up to 1/5 of meat sales.
- **Premium and gourmet butchers**, which have emerged in the last couple of years; 18 such gourmet butcher brands now exist. Notable ones include Swiss Butchery, Huber's Butchery and The Meat Club. They focus on premium cuts, paying attention to farming methods and animal welfare.

5.1.6 Challenges for EU products

Singapore is overall a fairly attractive market for meat, with fewer challenges than other markets in the region, partly due to the EU-Singapore FTA. That said, countries do have to be approved for individual meats and establishments prelisted before exports can begin; there are licence and permit fees for meat imports (albeit not excessively high); and there is competition from the US and domestic producers for poultrymeat plus Brazil and Australia for other meats.

Market Takeaway: Fresh meat

Consumption: poultry dominant, followed by pork. Consumption varied due to the multicultural composition of the Singaporean population.

Competition: US and domestic producers for poultry; Brazil and Australia for red meats.

Distribution: Food service accounts for 60% of all distribution. Retail channels varied but on balance supermarkets the most common.

Challenges: fewer than other markets in the region; though still some administrative challenges to overcome.

Opportunities: various opportunities traversing meats and types of cuts due to the multicultural and diverse Singaporean population, and the natural reliance on imports. At the top end, increased recent interest in premium butcheries focusing on farming methods and animal welfare.

5.2 Fresh fruit and vegetables

5.2.1 SWOT analysis

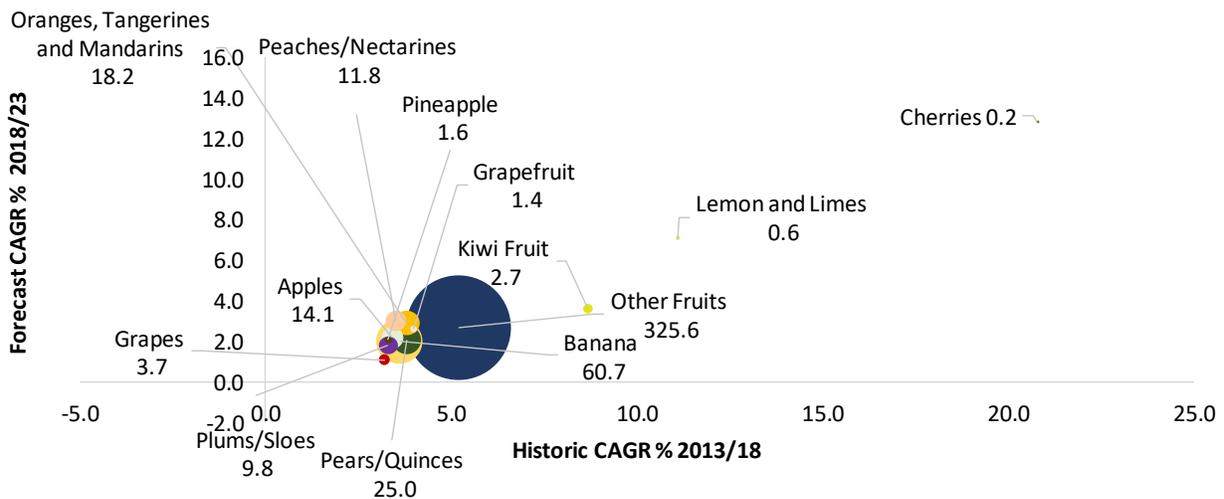
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ A population that is increasingly consuming fruit and vegetable products in a trend that is also backed by the highly influential government of Singapore. ▪ The demand for fresh fruit and vegetables is growing as the demand for processed fruit and vegetables is decreasing. ▪ Many local dishes across ethnic lines incorporate different fresh fruit and vegetable products in Singapore. ▪ Market access is fairly straightforward with no specific protocols required per country and per product. 	<ul style="list-style-type: none"> ▪ Other nations, including ASEAN members have had an FTA for longer allowing producers from these nations to develop relationships with Singaporean importers and distributors. ▪ The largest EU exporter of Fruit to Singapore, Spain is the 13th biggest exporter behind other nations such as Egypt and South Africa. ▪ The largest EU Exporter of vegetables to Singapore, the Netherlands is the 9th biggest exporter behind nations such as The USA and India.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ The expat community of Europeans in Singapore helps drive demand for EU produce including for some niche vegetables in small quantities. ▪ Singaporean consumers of apples, kiwis, and onions present a window of opportunity for EU producers, particularly during the Australia/New Zealand off-season. ▪ 95% of Singapore’s fresh fruit and vegetables supplies need to come from abroad. 	<ul style="list-style-type: none"> ▪ Regional countries like Malaysia and China can produce many of the same fruits and vegetables as the EU and have lower costs as a result of their geographic location. ▪ Singapore’s 30 by 30 strategy may cause domestic production to increase and imports of fresh fruit and vegetables to decline. ▪ Certain popular products such as durian and chikku are not typically produced in the EU.

5.2.2 Consumption

5.2.2.1 Evolution of consumption

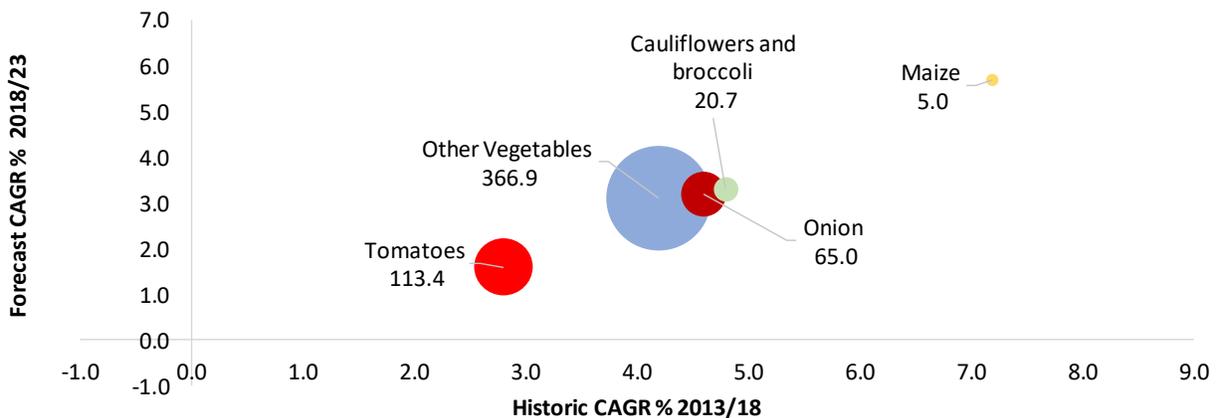
As Singapore is not an agricultural nation, 95% of its fresh food and vegetables need to come from abroad, and this fact, combined with an open trade policy allows an abundance of fruit and vegetable products to penetrate the Singaporean market. With the exception of the category of “other fruits” category (which includes popular fruits such as durian and chiku), bananas are the most popular fruit in Singapore in 2018 with a total market size of EUR 61m. This is followed by pears/quinces. The fastest growing fruit in the Singapore market in recent years was cherries which had a compound annual growth rate (CAGR) between 2013-2018 of 20.8% (Figure 5-5).

Figure 5-5: Evolution and forecast of fruits market (000 tonnes) in Singapore, 2013-2023; total volume



Source: Euromonitor International: Fresh Food, 2020.

Figure 5-6: Evolution and forecast of vegetables market (000 tonnes) in Singapore, 2013-2023; total volume



Source: Euromonitor International: Fresh Food 2020.

5.2.2.2 Consumer profile and purchase criteria

Consumers

Singapore imports a large and diverse supply of fruit and vegetables for all consumers. The diverse population of Singapore means that fruits and vegetables can be found from many regions of Asia and the wider world. Seasons have an effect on the availability of fruits, the following fruits are consumed more during these respective northern hemisphere seasons (as per section 2.2, wet and dry are more commonly used to describe seasons in Singapore, but for the following bullet points, northern hemisphere seasons are used):

- **Winter:** avocado, papaya, grapefruits, lemons, oranges, pineapples, bananas and apples.

- **Spring:** mangosteen, jackfruit, lychee, apricots, bananas, and apples.
- **Summer:** longan, Mango, Rambutan, Durian, Blueberries, Blackberries, muskmelons, cherries, honeydew melon, kiwifruit, nectarines, peaches, plums, raspberries, and watermelons.
- **Autumn:** dragon fruit, grapes, cranberries, pears and raspberries.⁵⁷

While consumers of many fruits, including apples and pears, span all income levels, those of kiwis and grapes tend to come from higher income groups.

Vegetables are available all year round due to import, however, the price of the vegetables can be directly affected by the arrival of the monsoon season particularly if it occurs in Malaysia, the largest origin of vegetables in Singapore. In such events, price changes are not offset by trading elsewhere as distributors import from Thailand, China and Australia and the greater differences in geographical locations tend to lead to higher transit costs. The price of some vegetables in Singapore rose by as much as 70% in 2019 due to the early arrival of the monsoon season.⁵⁸ There are some niches of more affluent consumers who consume red cabbage, beetroot and spinach – all from Europe due to a combination of little supply in the immediate region of Singapore, and the perceived quality of European produce.

Drivers and method of consumption

Singaporeans, being a largely urban population and for a long time, a British colony have been exposed to western consumption habits concerning food and vegetable products and general western lifestyle norms. This in turn allows for many similar trends in the consumption of food in the west to resonate with Singapore, such as in the increased attention on healthy eating habits. The ministry of health replaced the food pyramid to the current My Healthy Plate program, the program encourages fruit and vegetable consumption which can be increasingly effective in a nation where the government plays a large role in people's lives. In 2018 Singapore had a per capita consumption rate of 72 kg for Fruit and 96 kg for vegetables.⁵⁹

Despite this exposure to western consumption habits, it must be remembered that Singapore is a highly multicultural population; and, as noted below, the different dietary and culinary habits of different population segments are a notable driver of demand for the various types of fruit and vegetable, with particularly popular fruits and vegetables being durian, lychee, chiku, cabbages, carrots and onions.⁶⁰ While with such a multicultural population it is difficult to generalise about local dishes and the fruit/vegetables commonly used, certain combinations which stand out are *Bak Chor Mee* (cabbage and lettuce) and rojak salad (apples).

⁵⁷ ZuuOnline, Best Fruit Seasons in Singapore, 21/11/18, Available at <https://zuoonline.sg/life/dining/best-fruits-seasons-in-singapore/>

⁵⁸ Vegetable Prices Soar As Monsoon Season Arrives Early, 30/10/19 Available at <https://www.straitstimes.com/singapore/health/vegetable-prices-soar-as-monsoon-season-arrives-early>; Euromonitor International: Fresh Food, 2020

⁵⁹ 10 Year Per Capita Consumption trend, the food safety authority of Singapore available at <https://www.sfa.gov.sg/docs/default-source/tools-and-resources/yearly-statistics/per-capita-consumption.pdf>

⁶⁰ Fruit at Work, Fruit In Singapore <https://www.fruitatwork.com.au/blog/fruit-culture/fruit-in-singapore;> Euromonitor International: Fresh Food, 2020

Purchase criteria

In Singapore, some of the major factors that contribute to the decision-making process consumers make when deciding to purchase fruit and vegetables include freshness, origin, ethnic-specific diets and price. Singapore having a largely multicultural society brings in different culinary dishes with culinary dishes from ethnic Indians and Chinese incorporating a lot more fruit and vegetable products than Malay and western dishes. The origin of the product is also important due to the lack of domestic production, many consumers favour imports from Australia, the US, and Malaysia due to a perceived superiority of fruit and vegetable freshness from these nations over that of other nations such as China. This is also true for products such as apples and oranges, where lower income consumer tend to consume products from China due to price, but the US (and in some cases Australia) preferred as the origin of these fruits by more affluent consumers.

As stated in section 5.2.2.1, the arrival of the monsoon season directly affects the price of the fruit and vegetable products, and unexpected or poor monsoon season can lead to higher prices and push consumers away from purchasing fruit and vegetable products.

Fruit and vegetables pricing points and packaging

While economic fruits typically – often imported from China - retail at SGD 0.95/150g, premium and super-premium fruits such as various types of berries imported from the US may reach prices of SGD 3.50/100g or higher.

Packaging for fruit and vegetables varies. While loose fruit and vegetables are common, some imported fruit and vegetables will be prepacked with clear plastic packaging to provide the impression of cleanliness and freshness. Pre-portioned and convenient packaging is preferred for products which are intended for immediate consumption.

5.2.2.3 Recent market trends

Despite having a low obesity rate of around 6%⁶¹, the rate of obesity is slowly growing to a point where the government has stepped in to encourage a healthy eating campaign.⁶² This campaign benefits combined with a general increase in interest in fruit and vegetables are expected to have positive impacts on the market for fruit and vegetables.⁶³ Consumers are also increasingly showing a preference towards fresh fruit and vegetable products over processed fruit and vegetable products; and an increased interest in organic produce.

⁶¹ World Population Review, Obesity rates by Country <http://worldpopulationreview.com/countries/obesity-rates-by-country/>

⁶² Health Promotion Boards introduces My healthy plate to inculcate healthy eating habits amongst Singaporeans <https://www.hpb.gov.sg/article/health-promotion-board-introduces-my-healthy-plate-to-inculcate-healthy-eating-habits-amongst-singaporeans>

⁶³ Patterns of fruit and vegetable intake and physical activity among community-ambulant patients in Singapore: A cross-sectional study <https://journals.sagepub.com/doi/full/10.1177/2010105818769682> ; Euromonitor International: Fresh Food, 2020

5.2.3 Offer

5.2.3.1 Domestic production

Due to a largely urban environment, the room to grow fruit and vegetable domestically is strained resulting in the situation where 95% of fruit and vegetable products consumed in Singapore come from abroad. Of the 5% that is both consumed and produced domestically in Singapore, common products include durian, rambutan and mangosteens.

5.2.3.2 Imports and exports

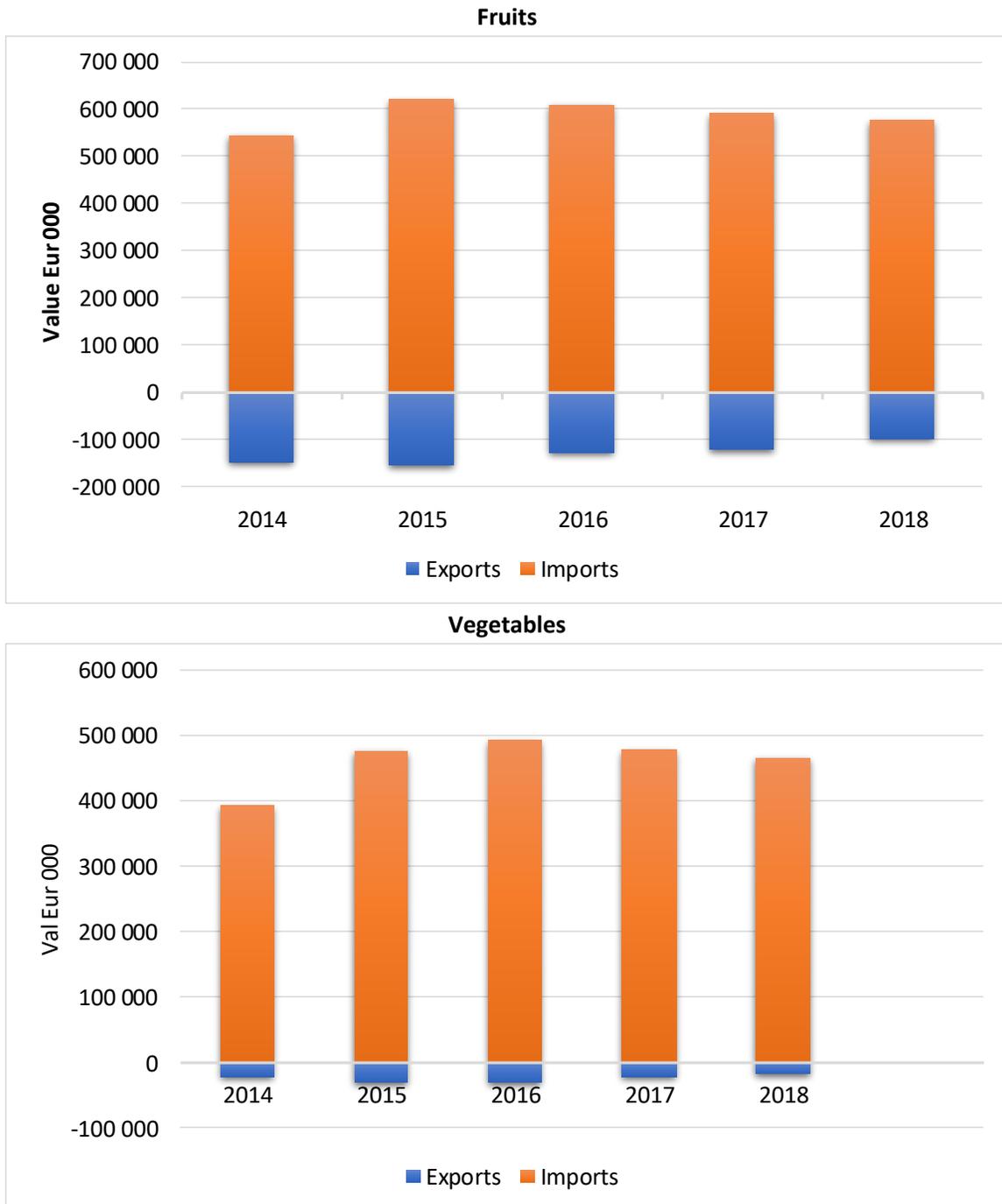
Firstly, it is important to note that Singapore acts as a transit hub for many companies exporting to wider Asian markets, therefore the graphs and figures in relation to exports from Singapore will not reflect the actual domestic production of the country.

As stated in section 5.2.3.1 Singapore imports 95% of its domestically consumed fruit and vegetable products. This is reflected in the trade balance, with imports greatly outweighing exports (Figure 5-7), though the above caveat on the country's status as a transit hub must be taken into account.

In terms of types of fruit and vegetables, the largest net imports can be seen in the categories of berries, apples/pears/quinces and citrus among fruit; and cabbage/cauliflower, onions and tomatoes among vegetables (Figure 5-8).

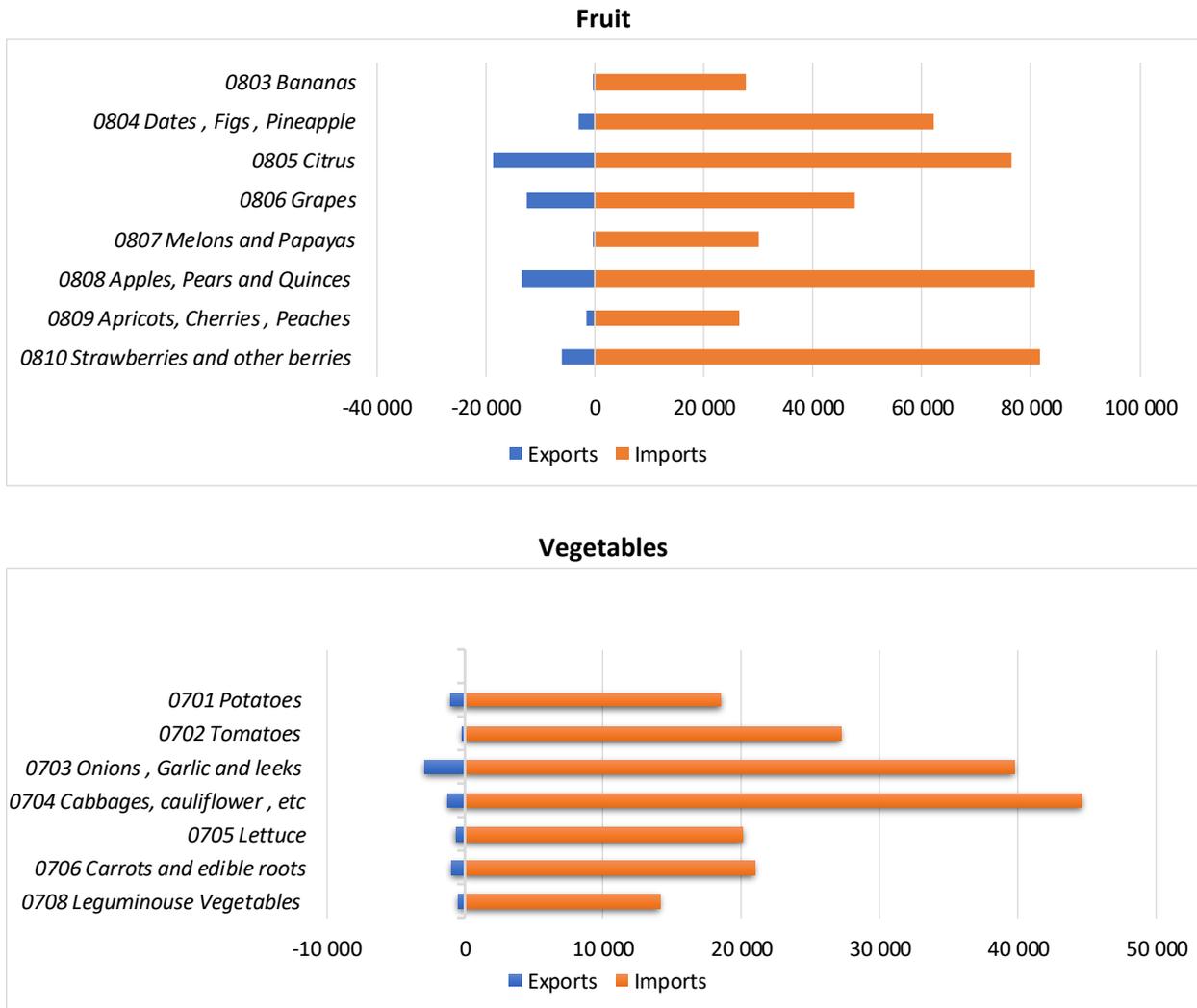
The products come from across the world as a reflection of Singapore's open trading policy. Malaysia and China account for the majority of Singapore's vegetable imports, and a large part of fruit imports (together with the US). This is a result of both the large-scale production of these products in those countries and their geographic proximity to Singapore (Figure 5-9). Australia and New Zealand are important origins for some fruits such as apples, grapes and kiwis; and the different harvesting seasons between the EU and these countries may provide some seasonal opportunities for EU producers.

Figure 5-7: Trade balance (imports and exports) of fruits and vegetables in Singapore, 2014-18; value 000 EUR



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 07 and 08.

Figure 5-8: Trade balance of fruit and vegetables by type, 2018 (value 000 EUR; selected types only)

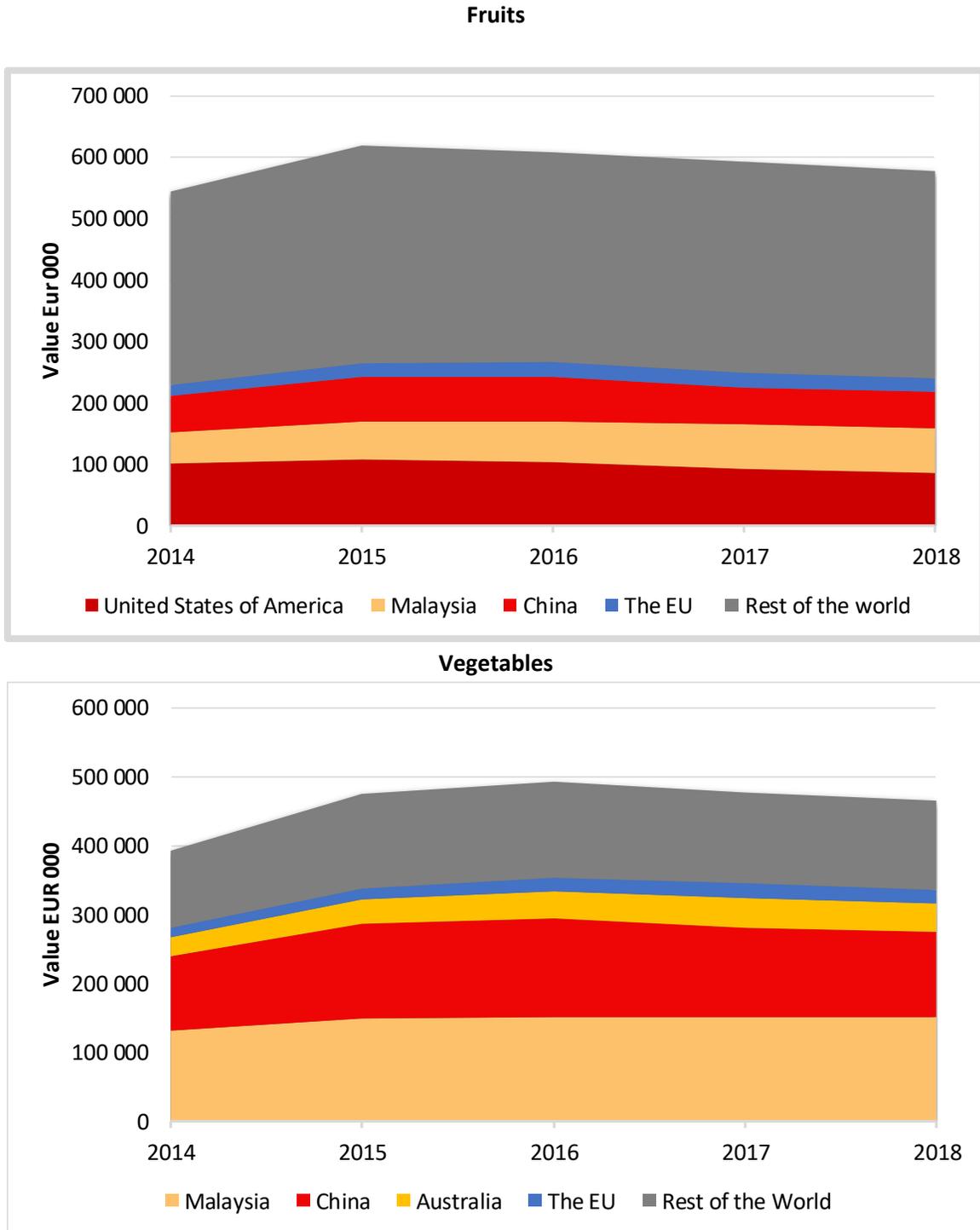


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Note: names for CN codes abbreviated in most cases.

Only indicated CN codes presented in these figures. 6 codes for fruit and 7 codes for vegetables are missing, which is why individual figures do not add up to totals in previous graphs.

Figure 5-9: Singaporean imports of fruits and vegetables by country, 2014-18; value 000 EUR



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 07 and 08.

5.2.3.3 EU GI products

Various EU GIs for fruit and vegetables were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration include:

- Pruneaux d'Agen (France)
- Ελιά Καλαμάτας (Elia Kalamatas) (Greece)
- Arancia Rossa di Sicilia, Mela Alto Adige / Südtiroler Apfel (Italy)

Section 9 can be consulted for a full list.

5.2.3.4 Main competitors

The main competition for EU producers is countries in the region producing fruit and vegetable products. This includes countries that have had FTAs and developed relationships with Singaporean importers and distributors. Competition in this market will present challenges for the EU as Singapore's open free trading outlook has led to an abundance of fruit and vegetable products from across the world. Singaporean consumers of apples, kiwis, and onions present a window of opportunity for EU products as well as the significant western expat community in Singapore which is more likely to purchase a potentially wider range of EU fruit and vegetable products.

5.2.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, fresh fruit and vegetables in Singapore fall into the category of fruit and vegetables; and as such must comply with the Sale of food act as well as the Control of Plants Act.

A licence (valid 1 year) and import permit (per shipment) are required for import. At the time of writing these cost SGD 378 (for the year) and SGD 3 (per consignment) respectively.

In terms of tariffs, currently European fruit and vegetables are not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by entering the corresponding CN code:
e.g. Potatoes: <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=0701>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for fresh fruit and vegetables can be found on the websites indicated in the box below. Most notably a phytosanitary certificate is required.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website by entering the corresponding CN code:

e.g. citrus fruits:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=0705&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of fresh fruit and vegetables into Singapore are in line with international standards.

Lists of pesticides and MRLs

The February 2019 version of the Food Regulations, which contains the list of maximum residue levels of pesticides by substance and type of food, can be found at the following link:

[https://www.sfa.gov.sg/docs/default-source/default-document-library/food-regulations-\(1-feb-2019\)](https://www.sfa.gov.sg/docs/default-source/default-document-library/food-regulations-(1-feb-2019))

The link above is to the most recent consolidated version of the Food Regulations at the time of writing. However, it is important to note that, as the Food Regulations are updated, the list in the ninth schedule may also change. It is therefore recommended that checks are made to see if a newer version of the Food Regulations, or any unconsolidated amendments, have been released.

A database of pesticides for commercial cultivation within Singapore can be found at the following link:

<https://www.sfa.gov.sg/tools-and-resources/pesticides-search>

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=0701&countryid=SG#h17>

Labelling

Prepacked fresh fruit and vegetable products must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. As it is a product which needs to be stored at a chilling temperature to maintain or prolong its durable life, prepacked fresh fruit and vegetables require date marking (as also set out in section 4.2.3).

5.2.5 Distribution

Singapore is known for its many wet markets dotted throughout the city-state which gifts fresh fruit and vegetable products a retailer that is familiar with consumers and an integral part of the local culture. However, the importance of this channel has slowly been declining due to the rise of modern supermarkets and consumer preference to purchase from them. Indeed, spurred by the attractive prices and ranges they offer, supermarkets are now estimated to account for the retail distribution of 70% of fresh fruit and vegetables.

The food service channel is important for fruit and vegetables in particular. A notable recent trend in the food service sector which has driven demand for certain vegetables is that of salad bars. There are various commercial kitchen suppliers which provide a range of fruit and vegetables to the food service industry (and in some cases may partly process them first).

Finally, due to the shortage of domestic supply of fruit and vegetables and following on from the above point, it should be noted that a certain quantity have to be imported for further processing. The juice industry in particular – led by the domestic producer Malaysia Dairy Industries Pte. Ltd - stands out as an industry which needs imports of fresh fruit for further processing. Nonetheless, opportunities may also exist in other industries which use fruit and vegetables as an ingredient for their further processed food.

5.2.6 Challenges for EU products

The major challenges for EU producers include the ability of regional nations like Vietnam and Malaysia to produce an abundance of fruit and vegetable products and export them cheaper to Singapore than the EU. Furthermore, the USA and Australia also hold an advantage as they are geographically closer plus have established FTAs with Singapore before the EU; the two factors allowing for some deeper relationships between importers and exporters to develop between these countries.

Market Takeaway: Fresh fruit and vegetables

Consumption: Singaporeans have increasingly adopted western consumer habits which have led to a growth in fruit and vegetable consumption, although ethnic background also plays a major role.

Competition: Regional and established exporters of fruit and vegetable products to Singapore present a major competition to the EU.

Distribution: supermarkets now dominant among retail channels.

Challenges: Establishing and competing against other nations in a field where other countries have had a long-established free trade agreement in place.

Opportunities: The adoption of the EUSFTA, the large expat community of Europeans in Singapore and Europe's northern hemisphere harvest season provides various small opportunities, both in more mainstream fruit (e.g. apples) as well as more niche fruit and vegetables (e.g. beetroot, spinach, kiwis).

5.3 Dairy

5.3.1 SWOT analysis

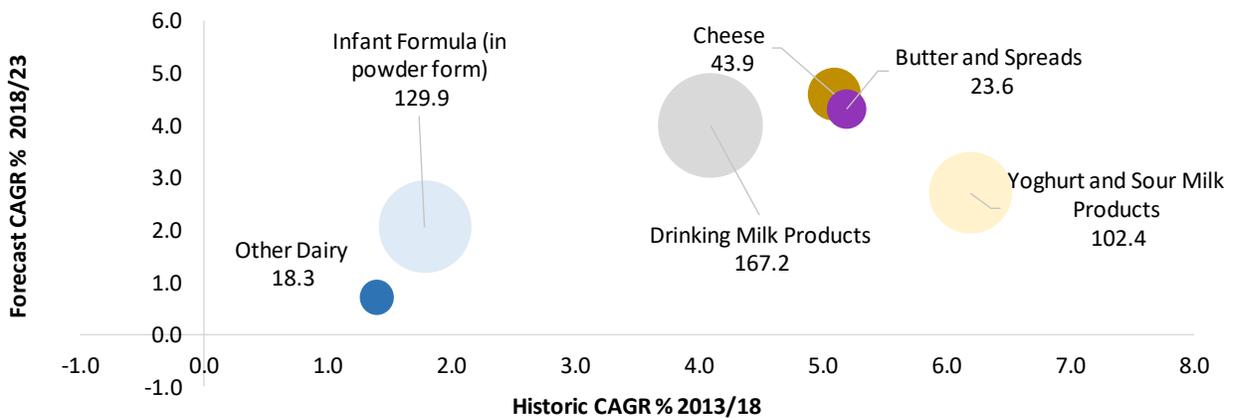
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Market growing strongly (4-6% per year for the main product categories). ▪ Comparatively simple market access requirements for dairy products compared to some other countries in the region. 	<ul style="list-style-type: none"> ▪ Limited tradition of some dairy products in Singapore. ▪ Population which can consume dairy limited by lactose intolerance. ▪ Cheese and butter markets quite small.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Growing butter and cheese markets. Unprocessed hard cheese in particular popular of late. Openness to new cheese products. ▪ Drinking yoghurt popular and widely consumed as lactose intolerance less of an issue. ▪ Niche for plant based dairy products. 	<ul style="list-style-type: none"> ▪ Strong competition from local dairy processors and Australia / New Zealand. ▪ Long shipping times may pose challenges for some products.

5.3.2 Consumption

5.3.2.1 Evolution of consumption

Drinking milk is the largest dairy segment in Singapore by value; it accounted for EUR 167m in 2018, having grown at 4.1% per year over the period 2013-18. Infant formula is the second largest segment (EUR 130m), followed by yoghurt and sour milk products (EUR 102m). At 6.2% per year, the latter has grown particularly quickly over the period 2013-18, though growth is expected to moderate going forwards. At just over 5% per year, the growth of the cheese and butter/spreads segments has outstripped that of most other dairy segments and is expected to continue to do so going forwards. The segments are, however, smaller in size; the cheese market was worth EUR 44m in 2018, and the butter segment approximately EUR 24m (Figure 5-10).

Figure 5-10: Evolution and forecast of dairy market (retail value, EUR millions) in Singapore, 2013-2023



Source: Euromonitor International: Packaged Food, 2020.

5.3.2.2 Consumer profile and purchase criteria

Consumers

Consumption and consumers of dairy in Singapore is constrained by its limited traditional use in the country and levels of lactose intolerance in the population. It is estimated that some 90% of Singaporean Chinese (who make up around $\frac{3}{4}$ of the population) are lactose intolerant⁶⁴. Against this background, the main consumers of dairy are those who do not suffer from strong lactose intolerance and/or those who come from cultures with a stronger historical use of milk (e.g. Indian and white Caucasian ethnicities)⁶⁵. Against the background of lactose intolerance set out above, it should be noted that there is a niche market for plant based dairy products in Singapore, which can of course be consumed by a wider range of consumers. It should, however be noted that this market, while in existence, is small; for example it accounts for under 10% of drinking milk consumed in volume terms.

Further specificities of consumers, where they stand out, are presented on a product by product basis below:

- **Milk** is not part of the traditional Singaporean culture/diet, and hence only roughly half of the population consumes it. As with dairy more broadly, high consumption is more associated with western diets and this is reflected among the consumers who drink it in larger volumes.
- **Cheese**: there is not a strong tradition of cheese use, other than the use of processed cheese on burgers and in sandwiches; indeed processed cheese accounts for around 60% of the total cheese market. Unprocessed cheese accounts for the remaining +/- 40%, and as it is primarily used in western cuisine, consumers of this cuisine – generally wealthier consumers, those which are well travelled or those with western origins - are an important consumer group for unprocessed cheese. Among unprocessed cheese, hard cheeses are slightly more popular than soft ones.

⁶⁴ <https://skinshare.sg/milk-intolerance-remedy/>

⁶⁵ <https://www.magnolia.com.sg/tips/the-surprising-story-of-milk-in-singapore/>

- **Yoghurt:** the consumer group is broader, as the fermentation process in drinking yoghurt digests most of the lactose; making the product consumable by a broader consumer base (and hence explaining its popularity in Singapore).
- **Butter:** the product accounts for roughly 2/3 of the butter and spreads segment, with margarine accounting for the remainder. Food service is important for butter consumption (indeed it is often seen as an indulgence product); and this determines to a large extent the consumers of butter.

Drivers and method of consumption

Milk is most commonly consumed alone. In some cases, it is consumed with cereal. While it is used with hot drinks such as coffee and tea, its usage in this context is not as high as in western cultures. Milk is most commonly consumed at home.

As noted above, western cuisine is a key driver for unprocessed **cheese** use, with mozzarella, parmesan and cheddar particularly popular. Sandwich and burger consumption are an important driver for processed cheese consumption. Food service is important for cheese consumption as a whole, with many new cheeses – Italian in particular - gaining a following through their use in high end specialised food service outlets. Cream cheese has recently been used in cheese tea (a trend which has emerged as Chinese bubble tea outlets enter the Singaporean market).

Yoghurt is most commonly consumed as a beverage, as reflected by the large market for drinking yoghurt products in Singapore, which indeed represent around ¾ of all yoghurt consumed.

While **butter** has been traditionally consumed mainly through food service channels and/or as a spread, it is increasingly being used inside the home for a variety of purposes including e.g. baking.

In terms of other dairy products, condensed milk is most commonly used in food service, namely dessert stalls and cafes. There is not a tradition of cream usage, though once again there is some demand for cream from food service outlets⁶⁶.

Purchase criteria

Singaporean consumers have been shown to be more open to trying new food products or brands in recent years, and one segment where this stands out in particular is dairy; meaning that brand loyalty is less of a consideration than it previously was. Looking at specific segments:

Milk: consumers increasingly favour fresh milk over shelf stable/UHT; and whole milk over skimmed or low fat. The market for powdered milk is rapidly shrinking as a result of these preferences. That said, health consciousness is an important criterion which reflects both in the increased preference of fresh over shelf stable and the avoidance of high sugar content in flavoured milk products (a category which account for around 1/5 of all milk consumption).

⁶⁶

https://www.eco-business.com/media/uploads/magazine/milk_perceptions_-_a_study_of_milk_consumption_patterns_in_singapore.pdf; Euromonitor International: Packaged Food, 2020

Cheese: for the more affluent consumer, who is a key consumer for premium unprocessed cheese, quality and unusual varieties are important criterion they take into account. Mass consumers, who are unlikely to purchase premium unprocessed cheese, price is a key consideration.

Yoghurt: there is a group of consumers that are health conscious, and hence actively look for high protein/low carbohydrate products.

Butter: brand loyalty is important for producers given the challenges in differentiating products, and this has historically led to brand being a consideration in the cases consumers purchase butter in retail outlets; though as with wider dairy this is now changing. However, the importance of the food service channel for distribution, which effectively bypasses consumer purchase criteria, should be borne in mind.⁶⁷

Dairy products on retailers' shelves in Singapore

Indicative price ranges for cheeses are as follow:

- **Economy cheese** such as sliced cheddar may retail at SGD 2 – 4 / 100g.
- **Mid-range cheese** – often used in cooking – such as mid-range mozzarella and parmesan tend to retail in the range SGD 4 – 6 / 100g.
- **Premium cheese** such as brie, camembert, raclette and various types of blue cheese tend to retail in the range SGD 6 – 10 / 100g.

Packaging inevitably varies by type of dairy product. For unprocessed cheese, the cheese type and expiry date tend to be quite prominent on packaging as they are looked for by consumers. Premium cheeses may make the brand and country of origin prominent. Cheese is most commonly sold prepacked in weights of between 100g and 250g (see images below).

⁶⁷ <https://www.businesstimes.com.sg/consumer/brand-disloyalty-the-new-normal-for-singapore-consumers-nielsen-survey> ; Euromonitor International: Packaged Food, 2020



Processed cheese typically comes pre sliced with each slice individually packaged to ensure freshness. Among other categories, thin wall plastic containers are most common for yoghurt, while gable top cartons dominate for milk. Claims and statuses such as fat-free and organic are often clearly displayed. For butter, mid-range butter tends to retail at under SGD 3 per 100g, and premium butter over this. Butter is typically sold in packs of 250g.



Pictures: © Agra CEAS / Euromonitor International, 2020.

5.3.2.3 Recent market trends

Milk is forecast to grow steadily at around 4% per year. Milk alternatives, though less than 10% of the milk market by volume, are expected to grow quickly in coming years, boosted by consumers who are concerned about health and wellness or who want to follow a plant based diet. Within this category, soy based products have been losing out of late at the expense of alternative such as almond, coconut and sweet potato based products.

Cheese is forecast to grow strongly going forwards. A few different trends can be observed in the market at present:

- Consumers are increasingly experimenting with various different types of cheese, whether by themselves or paired with bread/crackers; and the range of cheeses available, including notably unprocessed ones, is increasing as a result.
- Cheese mongers such as *The Cheese Ark* are utilising this curiosity to offer consumers the chance to taste different types of artisanal cheese, including types of cheese which have traditionally struggled more in Singapore such as goats cheese and blue cheese.
- As noted in drivers above, the use of fairly novel types of cheese in specialised restaurants (e.g. higher end Italian) is also a notable recent trend which serves to promote the consumption of these cheeses.

- Cheese tea, as noted above, is a new product on the market which is expected to continue to gain traction.

Yoghurt is forecast to grow more slowly going forwards. One of the reasons for this is concerns over a proposed sugar tax, which could impact the dominant segment of drinking yoghurt. Greek style yoghurt is gaining in popularity among consumers that (1) can digest its lactose content and (2) are more focused on healthiness and hence appreciate it for its nutritional characteristics.

The outlook for **butter** is more positive than the outlook for the combined butter and spreads category (which includes margarine). While prices have been volatile in recent years due to supply and demand mismatches, they stabilised in 2019. Additionally, as noted above, consumers are adapting butter for a wider range of uses; and furthermore, some positive aspects of butter in health terms are being recognised by consumers (though it should be noted that consumers acknowledge its high fat content). This latter factor in particular is leading to some demand for higher quality butter as a sort of indulgence / luxury product. Furthermore, some different flavours of butter such as garlic and herb have been introduced to the market recently.

Finally, a general recent trend which acts as a tailwind for a variety of dairy products is the trend of home cooking and baking. Consumers are increasingly interested in recreating inside the home foods that they have tried outside. This for example is leading to them buying different cheeses for home-made pizzas, or butter for baking; with the awareness of the use of cheese or butter in the recipe coming from having tried the food outside the home.

5.3.3 Offer

5.3.3.1 Domestic production

Actual production of fresh milk is, unsurprisingly, very limited in Singapore given the shortage of land. There are a handful of dairy farms in the country such as Dairyfolks. However, there are a variety of dairy processing companies which produce dairy products locally. Notable ones include: Malaysia Dairy Industries Pte Ltd which, contrary to its name, is actually a locally owned company which has been operating in Singapore since 1963 and is responsible for brands such as Marigold and Vitagen; and F&N Foods, a Singaporean-Malaysian company active in various food segments including dairy.

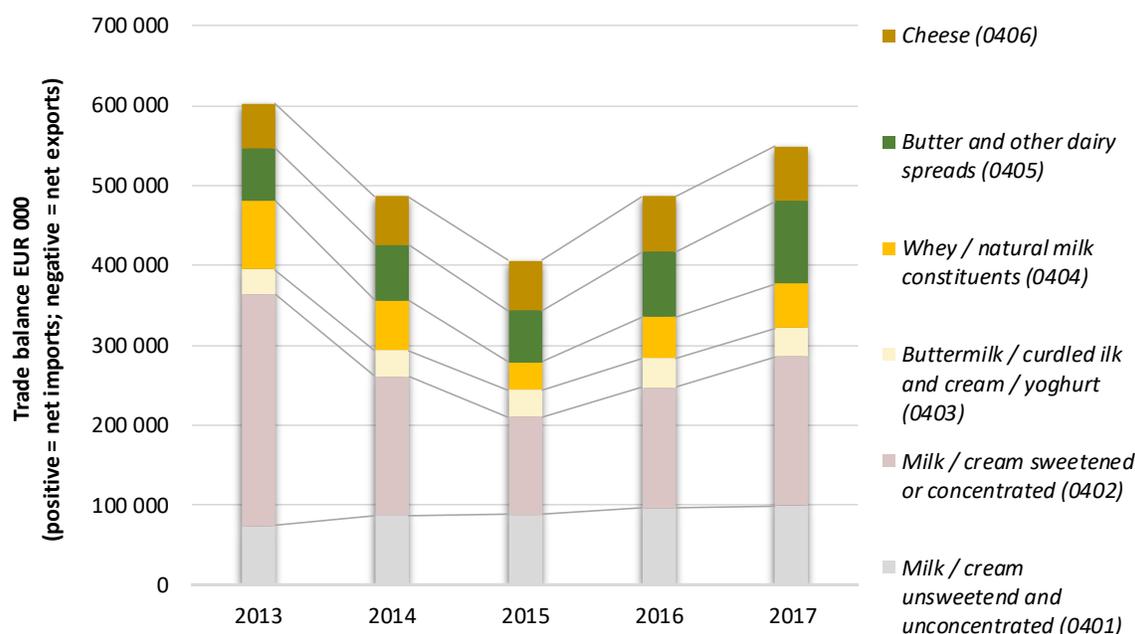
In addition to the above current major players, the company SMC Food 21 has announced its intention to establish its regional hub for the dairy industry in Singapore in order to fulfil increasing demand for products such as infant milk powder, chocolate, yoghurt and ice cream in the region. The company was one of the first outside China to receive the China HACCP (Hazard Analysis and Critical Control Points) certificate, clearly demonstrating its regional intentions. It should, nonetheless, be noted that the use of Singapore as a regional hub could be tricky due to tough domestic competition in some markets (e.g. Vinamilk in Vietnam) and varying standards in the different countries.

Against the background of the strong and further developing dairy processing industry but limited fresh milk production, it is unsurprising that there is the need to import raw ingredients for dairy processing.

5.3.3.2 Imports and exports

Singapore is unsurprisingly a heavy net importer of all dairy products. Milk/cream, both unsweetened and sweetened account for the majority of net imports, with some of this being used for the domestic dairy processing industries (Figure 5-11).

Figure 5-11: Trade balance (imports and exports) of dairy in Singapore, 2014-18; EUR 000



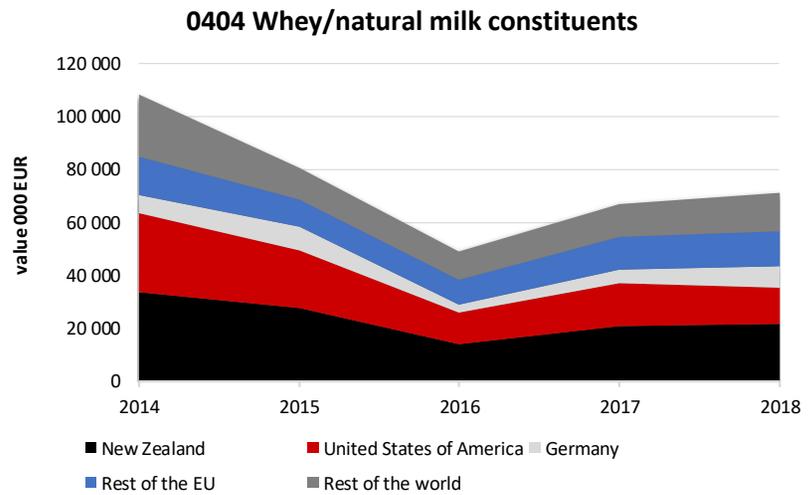
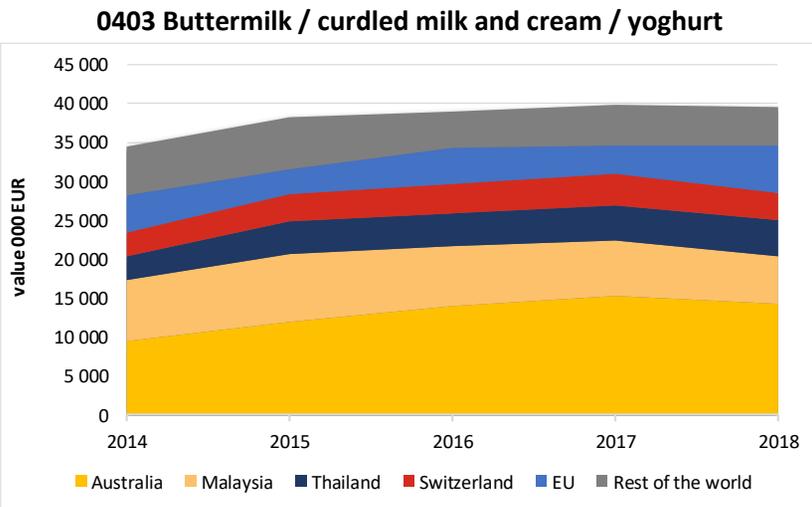
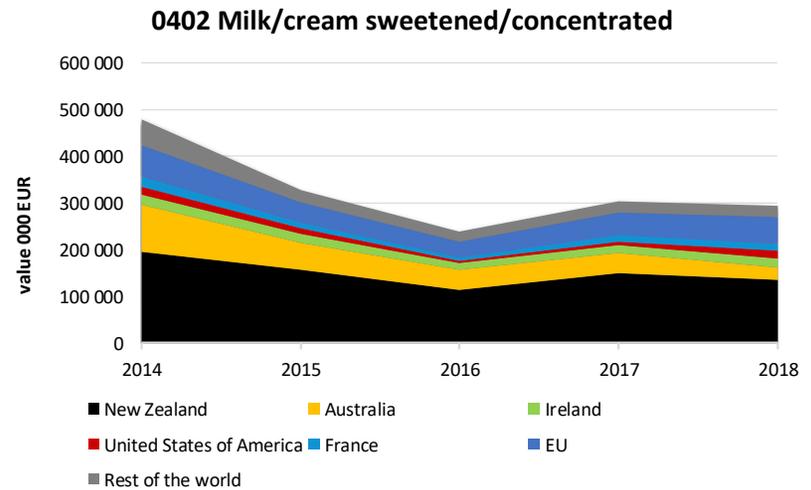
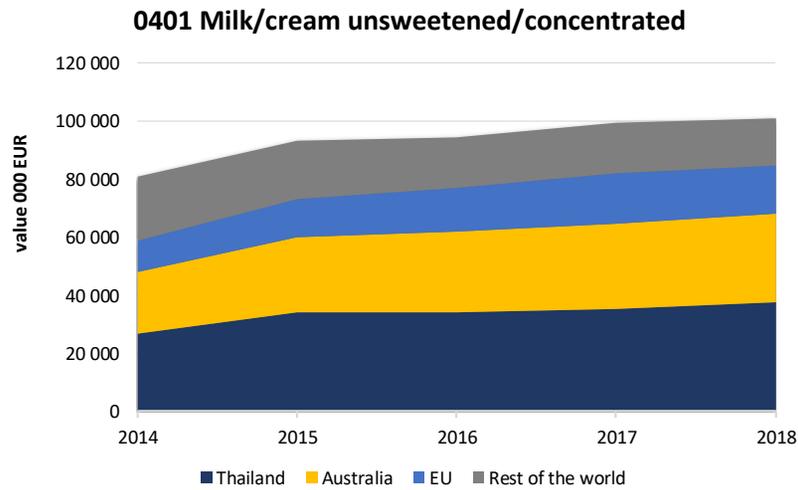
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
CN codes in brackets.

Origins of dairy imports do vary by product to some extent, though Australia and New Zealand are important origins for all dairy products to some extent. Most notably, New Zealand dominates sweetened/concentrated milk and butter imports; while Australia has leading positions in buttermilk and cheese imports. Aided by its geographical proximity, Thailand is the number one source of unsweetened/unconcentrated milk imports. Despite the strong competition, EU countries hold strong positions in multiple dairy markets, most notably the cheese market where EU countries combine account for around 30% of imports. The Netherlands and France also hold strong positions among butter/dairy spread imports (Figure 5-12).

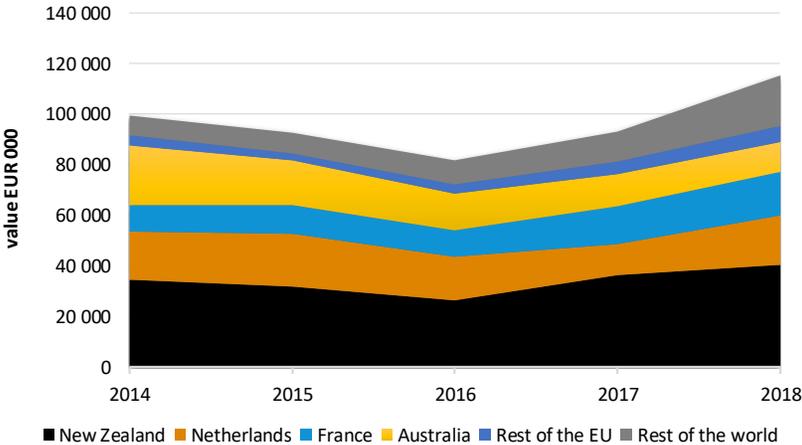
As noted in section 5.3.3.1, the use of Singapore as a regional hub for dairy does pose challenges. Against this background, the large scale re-export of dairy products imported into Singapore has not been identified. However, as identified in the same section, raw dairy materials are imported and processed into consumer products, some of which are exported; and with the intention of SMC Food to open its regional hub in Singapore, the extent to which this occurs is likely to increase going forwards.

Market Entry Handbook

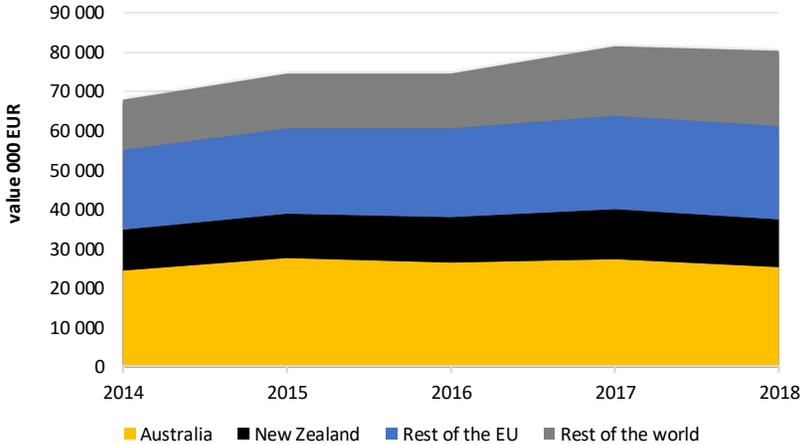
Figure 5-12: Singaporean imports of different dairy categories by country, 2014-18; EUR 000



0405 Butter/dairy spreads/



0406 Cheese



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

CN codes in brackets.

5.3.3.3 EU GI products

Various EU GIs for dairy products (cheeses) were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing include:

- Danablu (Denmark)
- Queso Manchego (Spain)
- Camembert de Normandie, Brie de Meaux, Reblochon, Roquefort (France)
- Asiago, Fontina, Gorgonzola, Grana Padano (Italy)
- Queijo S. Jorge (Portugal)

This list is non-exhaustive; section 9 can be consulted for a full list.

5.3.3.4 Main competitors

While there is very limited production of fresh milk in Singapore, there is significant processing for dairy products. The main competitors therefore include both local dairy processors, and foreign companies. The importance of the different players does vary by product. Most notably:

- **Drinking milk:** local processors Malaysia Dairies and F&N Foods account for over 40% of the market, though Japanese company Meiji also has a significant share, and there are strong imports from New Zealand as witnessed by the presence of Fonterra.
- **Yoghurt:** though Yakult is the largest player in the market, local company Malaysia Dairies also has a strong position.
- **Cheese:** New Zealand and Australia hold strong positions, and indeed Fonterra account for about ¼ of all cheese sold in Singapore, with Kraft foods accounting for another ¼. The remaining 50% of the market is quite fragmented, with only Lactalis (France) standing out as holding a notable share; and indeed this is reflected by the fact that imports are sourced from various places.
- **Butter:** though New Zealand has an important position among importers, large local companies – manufacturing and branding companies Auric Pacific Group and Goodman Fielder hold around half of the market. Most of the remainder is distributed between various well known international producers such as Ballantyne Foods, Fonterra, Unilever, Arla and Lactalis.

5.3.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, dairy products in Singapore fall into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European dairy products do not face tariffs.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by entering the corresponding CN code:

e.g. cheese: <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=0406>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for the main dairy products can be found on the websites indicated in the box below. Most notably, a veterinary health certificate for animal products is required.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website by entering the corresponding CN code:

e.g. cheese: <https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=0406&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of dairy products into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=0401&countryid=SG#h15>

Labelling

Prepacked dairy products must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. These Food Regulations contain definitions of various dairy products (e.g. *Ultra-heat treated milk or U.H.T. milk shall be milk which has been subjected to heat treatment by being retained at a temperature of not less than 135°C for a minimum of two seconds and immediately aseptically packed in sterile containers*) and these can be consulted to confirm products adhere to these definitions. Most fresh dairy products require date marking (as also set out in section 4.2.3); and the font size requirements for the labelling specifically of milk are greater than for other products (generally minimum 3mm-6mm height).

5.3.5 Distribution

Dairy products as a whole are predominantly (85%) distributed through modern grocery retailers. Supermarkets (64%) are particularly popular. Traditional retailers account for under 10% of distribution. At 6%, non-store retailing – led by direct selling - is increasing in popularity (Figure 5-13).

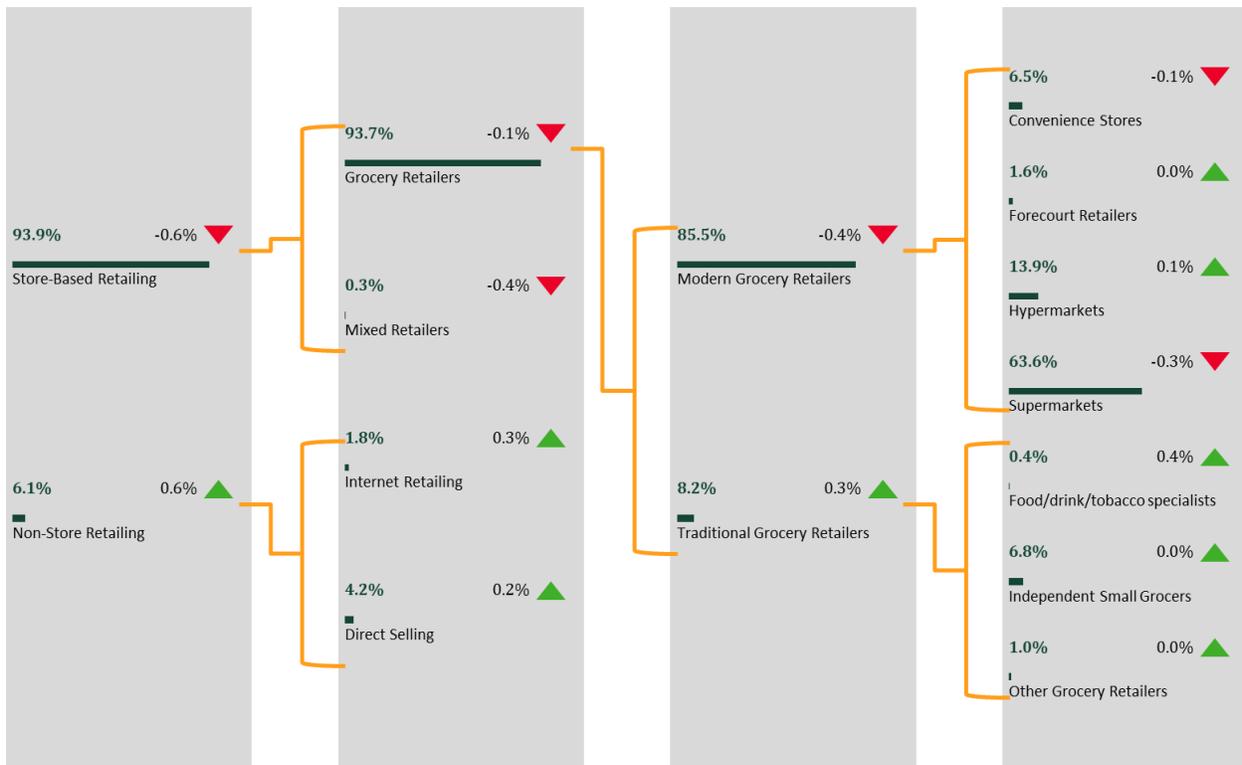
Nonetheless there are some specificities by dairy product:

- **Cheese, butter** - supermarkets are even more important (73% and 74% respectively). The importance of non-store retailing is minimal (just over 1%). Increasingly, dedicated cheese

mongers such as The Cheese Ark and restaurant/gourmet store crossovers such as So France are playing an important role in the distribution of more specialist cheeses.

- **Milk** – modern retail channels account for almost all distribution (93%).
- **Yoghurt** – non store retailing is important with a 17% share of sales. Most notably, direct selling accounts for almost 15% of sales.

Figure 5-13: Distribution channel overview of dairy in Singapore (2018); all dairy products; retail value



Source: Euromonitor International: Packaged Food, 2020.

5.3.6 Challenges for EU products

While there is minimal fresh milk production, there is considerable dairy processing in the country providing domestic competition. Australia and New Zealand are well established exporters to Singapore in many categories, providing further competition. Drinking milk and yoghurt/sour milk are the most popular dairy categories in Singapore; it may be difficult for EU producers to compete in these categories given the long shipping times to the country.

Market Takeaway: Dairy

Consumption: drinking milk and yoghurt/sour milk most popular, though cheese and butter growing strongly.

Competition: varies a bit by product, but in general popular local dairy processors and imports from Australia and New Zealand.

Distribution: modern retail dominates overall, though there are nuances by product type. Non store retailing popular for yoghurt. Food service important for cheese.

Challenges: strong competition, including growing domestic production, and distance to Singapore may pose challenges for fresh products.

Opportunities: the growing cheese (most notably hard unprocessed) and butter markets.

5.4 Wine

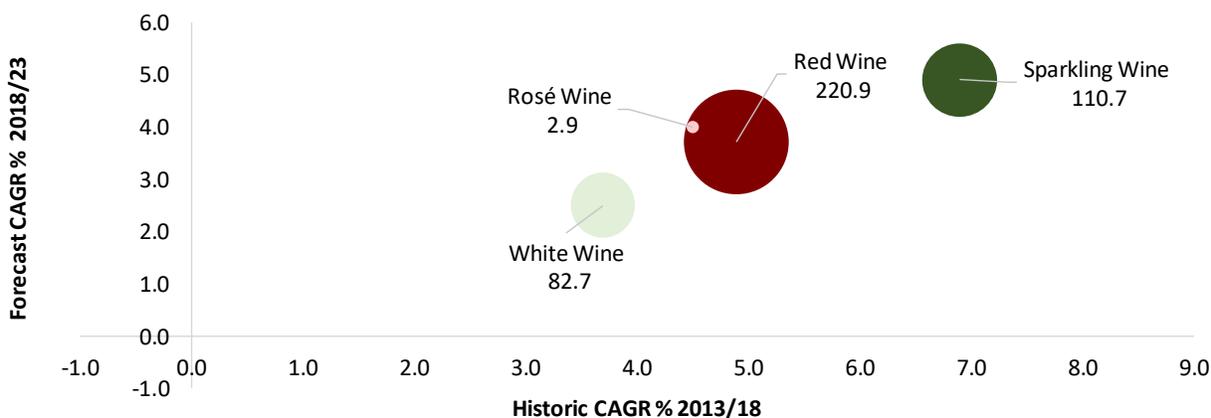
5.4.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> Market is growing at a moderate pace. Consumers in all age groups and social classes; and high disposable incomes facilitate the purchase of wine. Consumer have high knowledge about wine and there is a strong re-export industry. 	<ul style="list-style-type: none"> Muslim part of the population (15%) do not consume. It can be hard to get a permit for selling wine in Singapore.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> The online market is growing, and this has benefitted some smaller/niche producers. Consumers knowledge continues to grow and so they are increasingly open to tasting new products. Sparkling wine has grown rapidly, with Prosecco a particular beneficiary. Singapore's status as an important re-export hub for wine means it can open the way not just to the domestic market, but to the broader region. 	<ul style="list-style-type: none"> High taxes on wine products. Australia is historically dominant and the main competitor for high quality wines. Chile the main competitor for cheap wines.

5.4.2 Consumption

5.4.2.1 Evolution of consumption

Figure 5-14: Evolution and forecast of wine market (million Euros) in Singapore, 2013-2023; total value



Source: Euromonitor International: Alcoholic Drinks, 2020.

Singaporeans enjoy drinking wine, even though the country is far away from any commercial wine-producing area. Red wine is the most popular wine in Singapore, with a total market value of EUR 221 million in 2018. The red wine markets value was 50% higher than the market for sparkling wine, which was the second biggest market with a value of EUR 111 million, as shown in Figure 5-14. Due to recent trends the market for sparkling wine has become larger in value terms than the market for white wine.

However, white wine is still popular as well and in 2018 the market had a value of about EUR 83 million. Rosé wine consumption on the other hand is very low and the market valued about EUR 3 million in 2018.⁶⁸

5.4.2.2 Consumer profile and purchase criteria

Consumers

Singaporeans are wine enthusiasts and love good wines. And thus, the sector is growing rapidly. Some specific aspects about Singaporean wine consumers are listed below:

- **Diverse population:** consumers can be found across the different ethnic groups of Singaporean society, including Chinese, Indian and Western European groups. However, given their religious beliefs, Singaporean Muslims (which represent around 15% of the population) are not a notably consumer group.
- **Female vs male:** In general Singaporean men drink more wine than women. However, especially sparkling and white wines are preferred by women.
- **Age:** Most consumers are between 25 and 50 years old. The younger generations tend to drink in bars and restaurants more often, while the older generations mainly drink wine at home.
- **Knowledgeable:** Singaporean consumers are very well informed about where to get good wines, different products and brand and where to find them. Moreover, they like to experiment and taste new wines.
- **Income:** Due to different trends, taxation of wine products and preferences of consumers, most of them are part of the wealthier part of the Singaporean society.⁶⁹

Drivers and method of consumption

The Singaporean lifestyle and its highly diverse population create varying drivers for consumption. The diverse population enjoys drinking different kind of wines (as noted in purchase criteria below), which provides a market for many different products. Depending on their origin Singaporeans enjoy drinking wine while having dinner or at a bar and they are generally interested in trying out new beverages. For example, western expats have their wines with their meals and usually do not drink wine daily. Asians on the other hand, tend to drink on occasions like parties or group dinners.

Due to the steady growth of the Singaporean economy, consumers tend to have an increasing amount of disposable income, and thus, consumers increasingly prefer to buy more premium quality and expensive wines, rather than offers or mainstream brands. This so called premiumisation can be found across most wine categories, especially within the categories for sparkling wines; and is a notable reason for the fast growth rate of this category. The exception to this trend is the fortified wine category; it is expected to

⁶⁸The big red: Wine in Singapore, a red-hot market? <https://www.spiritedsingapore.com/2019/01/the-big-read-wine-in-singapore-a-red-hot-market/>;

⁶⁹Wine Drinking Preferences in Singapore <http://thewinestable.com.sg/Wines,Preferences,Singapore>; A quick guide to wine distribution in Singapore <https://www.tradegecko.com/blog/supply-chain-management/a-quick-guide-to-wine-distribution-in-singapore>

grow at a slower pace with consumers less likely to buy premium offerings; making it hard to sell those products in Singapore.

As a result of the above, a Singaporean wine culture is establishing itself and consumers are increasingly knowledgeable about wines. Wine is easily accessible, and a range of varieties are on the market, which makes it very easy for consumers to purchase, further driving consumption. It is forecast that the demand for wine will continue to grow in the coming years as shown in 5.4.2.3⁷⁰.

Purchase criteria

As noted above, most Singaporeans prefer higher quality wine and due to their high disposable incomes and do not mind paying higher prices. As stated in the section above, Singaporean consumers are increasing their knowledge about wines, which increases the drive of consumers to buy good quality wines. Another driver towards good quality wines is the high “sin tax” on alcoholic beverages. Due to this tax, even prices of originally cheap wines are quite high, which drives consumers to buy high quality wines because it better validates their high prices.

The mature and sophisticated Singaporean wine drinker usually prefers dry and complex wines, whereas younger or new wine drinkers tend to drink sweeter and lighter wines. However, it seems like the first group prefers to buy cheaper wines with good quality (from well-known brands), while new wine drinkers often prefer to buy higher priced products that are perceived to be of good quality. Chinese Singaporeans mostly favour red heavier wines such as Cabernet Sauvignon, Merlot or Shiraz, while Indian Singaporeans like their wines neither too heavy nor too light, but somewhere in the middle. However, the general consumer is open to try new tastes and novel exotic flavours.⁷¹

Against the background above, overall, Australian wine is the most popular in Singapore with around 1/3 of the market, while French wine holds around 1/5th of the market. French and Italian wines tend to be sought out by consumers with higher levels of wine knowledge, indicating a relationship between the level of knowledge and consideration of European origin at the time of purchase.

Wine on retailers’ shelves in Singapore

As a general rule, retail prices for wine are as follows

- **Economy:** between SGD 18 – 32/750ml
- **Medium:** between SGD 33 – 65/750ml
- **Premium:** above SGD 65/750ml

While there are occasionally 10-20% discounts, other methods of promotion tend to be preferred and more successful. For example, one common method of promotion is the offering of a free gift such as a wine glass. Some more mainstream/mass market wine producers use additional promotional method

⁷⁰ Euromonitor International: Alcoholic Drinks, 2020.

⁷¹ Singapore wine market to reach \$1 billion by 2021 <https://www.thedrinksbusiness.com/2018/05/premium-wine-sector-set-to-drive-singapore-wine-market/>; Euromonitor International: Alcoholic Drinks, 2020.

such as prizes/draws and other producer led promotions against the purchase of a certain number of bottles (see below).



The vast majority of wine comes in 750ml glass bottles. There are some manufacturers who offer 180ml single serving glass bottles.

For the medium and premium segment of wines, suitably premium/luxurious packaging needs to be provided, given that bottles are often seen as an important symbol of status/wealth (see below).



Pictures: © Agra CEAS / Euromonitor International, 2020.

5.4.2.3 Recent market trends

At the top level, wine is forecast to continue strong growth in coming years, with the market for sparkling wines forecast to grow the fastest at 5.1% per year over the period 2019-23. The red wine market is forecast to grow at 2.4% per year, and white at 1.7% per year.

The internet retail sector enables exporters to get higher margins due to competitive packages accessible through big online retailers such as RedMart and thus has helped bigger brands to intensify their online retail market. Furthermore, internet retailing is also interesting for producers of some niche products which find it too costly or difficult to sell their products through channels like super- or hypermarkets. However, the wine market is very reliant on on-trade sales as well. In 2018 the on-trade sector proportionally grew more than the off-trade sector in total volume sales. This is due to the fact that Singaporeans like to dine out. The preferred overall choice for accompanying a proper meal are light grape wines, though there are nuances between different consumer groups.

As previously noted, sparkling wine consumption is on the rise. The trend to drink Champagne decelerated in 2018 because consumers were interested in cheaper alternates and thus, Prosecco became number one in sparkling wines. As stated before, the average Singaporean consumer - to the extent that one can be considered to exist - is open to new tastes, which is one reason why the sparkling wine sector is growing in general and champagne does not dominate it. Many consumers like to go out for a drink to bars or restaurants. This trend has furthermore enhanced the popularity for Prosecco because it is an ingredient in many drinks like Aperol Spritz for example. The switch from Champagne to the cheaper Prosecco is moreover forecast to increase the interest in other sparkling wine brands in the future. This does not mean Champagne became unpopular; consumption of Champagne is still growing, just at a slower pace and well-known brands will have to promote their products, establish price promotions and stay innovative with their marketing as well as packaging.

Furthermore, referring back to the increase in Prosecco sales, it is seen as hip for the urban population to have a brunch with a glass of Prosecco and fourth, the market is accessible for many different products because consumers in Singapore are very open to try out new tastes and novel exotic flavours. Consumers health awareness is growing, as stated in 3.3.1.1, and this may in turn influence the wines they may choose going forwards.⁷²

Finally, Singaporean consumers show increased aggregate levels of knowledge about wines – something which bodes well for EU producers given the more knowledgeable consumers are those who are more inclined to try European wines, rather than the traditionally dominant Australian wines.

⁷² Euromonitor International: Alcoholic Drinks, 2020.

5.4.3 Offer

5.4.3.1 Domestic production

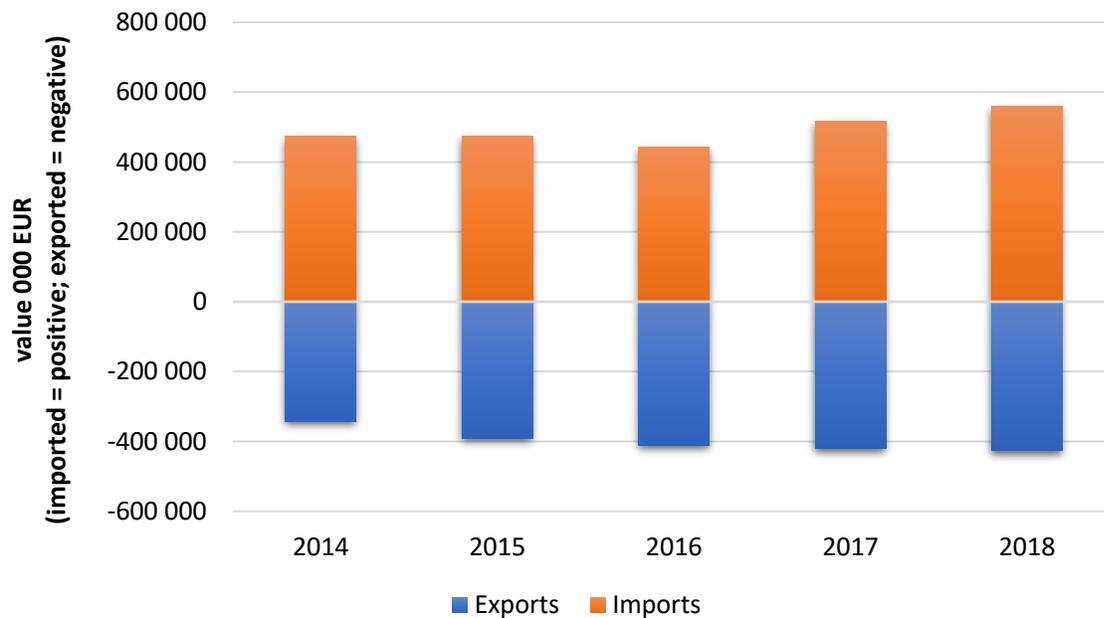
Singapore being a small city-state has no domestic wine production and is far away any commercial wine-producing areas. However, with its prime location and good connections (as explained in 4.4.1) it imports a lot of wine from different areas of the world, acting as a regional distribution hub.⁷³ The excellent location and infrastructure, together with tax regulations, which allow bonded warehouses to store wine with excise and sales taxes suspended until removal of the product for sale or consumption, facilitate this practice. There are several actors engaging in this practice as importers/re-exporters, many of which are listed in section 8.5. In addition, some operators choose to manage the import/re-export process themselves, either by partnering with bonded warehouses, or by setting up a company in Singapore for this purpose (sometimes with a specifically identified local partner).

5.4.3.2 Imports and exports

Singapore is importing a lot of wine from all over the world. The total imported value of this sector was close to EUR 560 million in 2018. As mentioned in 5.4.3.1 Singapore has no own wine production. However according to 4.4.1 Singapore is a hub for exports that enter Asia in general. This explains its high wine export value, which is about EUR 430 million. In volume terms, around 50% of wines exported to Singapore get sent to other destinations and thus make up the high export numbers seen in Figure 5-15; though the declared unit value of the exported wines is higher than their declared imported value, meaning that around in value terms around 79% of imports are re-exported. This is reflected in Singapore's trade balance for wines in 2018: around EUR 130m, which shows that it of course imports more than it exports, caused by the countries own wine consumption. Over the years (2014-18) Singapore's wine exports grew steadily, while its imports only show a small decline in 2016.

⁷³ The big read: Wine in Singapore, a red-hot market? <https://www.spiritedsingapore.com/2019/01/the-big-read-wine-in-singapore-a-red-hot-market/>

Figure 5-15: Trade balance (imports and exports) of wine in Singapore, 2014-18; EUR 000

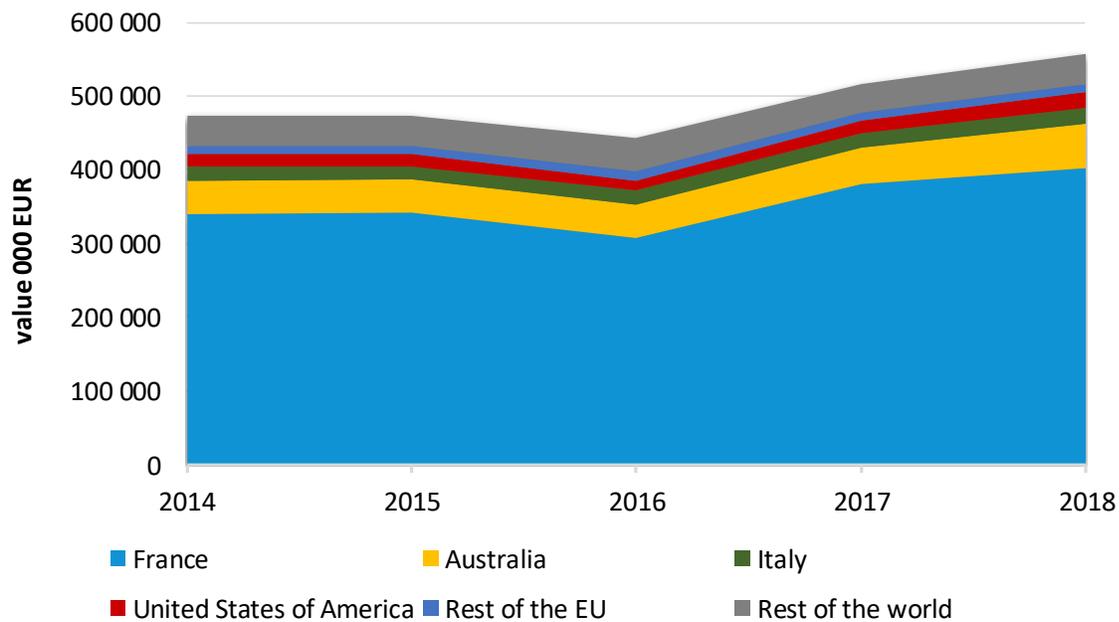


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

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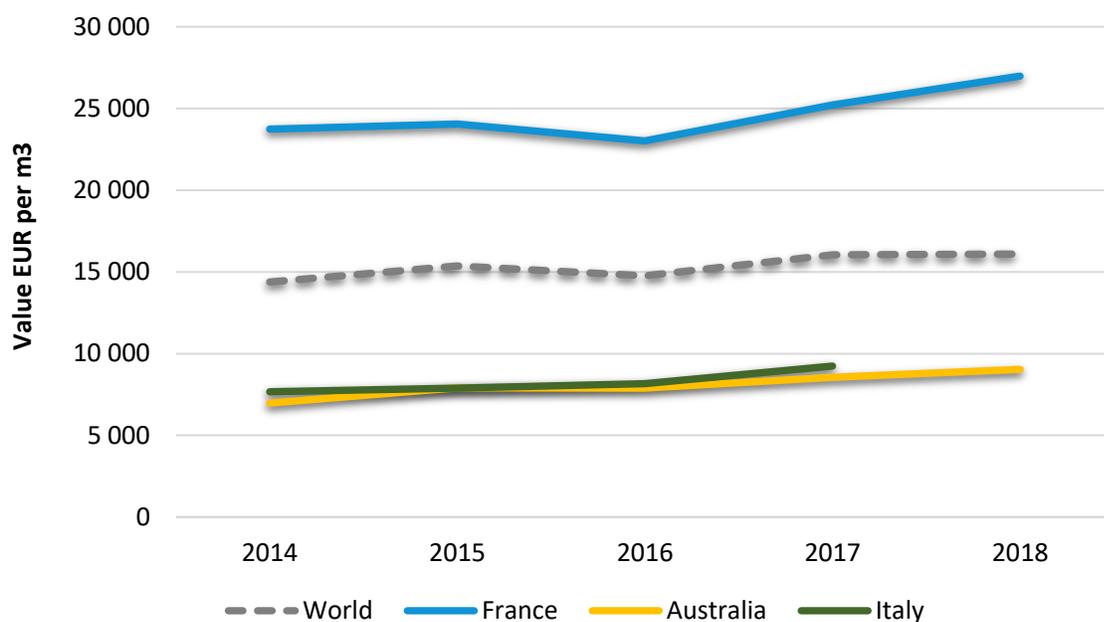
Its main sources of wine imports by value are France and Australia. France is still far ahead with a wine export value of more than EUR 400 million in 2018, whereas Australia's export value was around EUR 60 million in 2018. After those two big players another European Country follows. Italy's wine export value to Singapore in 2018 was around EUR 21 million. As depict in Figure 5-16 the US also is one of the main exporters of wine according to its value. In 2018, the US export value was more than EUR 20m. Figure 5-16 shows very clearly that the total value of imported wine by Singapore rose from 2014 to 2018, even though there was a small decline between 2015 and 2016. It must, however, be remembered that around half of the wine in volume terms that is imported into Singapore is re-exported, making it difficult to identify with certainty from the data the importance of different origins for the domestic wine market.

Figure 5-16: Singaporean imports of wine by country, 2014-18; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2204.

However other players are important as well, when it comes to the volume of exports. France and Australia stay the main exporters according to volumes as well, however, Chile is the number three in volume terms. The country exports cheaper wines than the EU or Australia for example and thus, is not high ranked in terms of value, but volume. For exporters planning to export cheaper wines to Singapore, Chile will be the main competitor.

Figure 5-17: Singaporean imports of wine by country, 2014-18; Value EUR per m³

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2204.

The value per m³ rose between 2014 and 2018. In 2018 French exports had a unit value well above the world average at EUR 27 000 per m³. While data for Italy for 2018 is not available, unit values of Italian and Australian wine over the period 2014-17 were comparable in the range EUR 7 000 – 9 000 per m³, with Italian wine slightly ahead as shown in Figure 5-17.

5.4.3.3 EU GI products

A large number of EU GIs for wines were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing include:

- **Cyprus:** Κουμανδάρια (Commandaria)
- **Spain:** Málaga, Rioja, Jerez – Xérès – Sherry or Jerez or Xérès or Sherry, La Mancha, Cava, Navarra, Valencia, Ribera del Duero, Priorat, Rías Baixas, Valdepeñas, Cataluña
- **France:** Beaujolais, Bordeaux, Chablis, Champagne, Graves (Graves de Vayres), Médoc, Moselle, Saint-Emilion, Châteauneuf-du-Pape, Côtes de Provence, Margaux, Touraine, Anjou, Pays d'Oc, Val de Loire
- **Italy:** Chianti, Marsala, Barolo, Vino nobile di Montepulciano, Bolgheri Sassicaia, Dolcetto d'Alba, Franciacorta, Lambrusco di Sorbara, Lambrusco Grasparossa di Castelvetro, Montepulciano d'Abruzzo
- **Hungary:** Tokaj
- **Portugal:** Madeira, Madère or Madera, Porto, Port or Oporto, Douro, Dão, Vinho Verde

- **Romania:** Dealu Mare, Murfatlar

This list is non-exhaustive; section 9 can be consulted for a full list.

5.4.3.4 Main competitors

France is the number one exporter of wine to Singapore, with Italy also a notable exporter; though it must be remembered around half of wine imported to Singapore is re-exported, and it is not possible to identify from trade data the importance of different sources for the domestic market alone. The main competitor for these EU countries in terms of pure import value is Australia. Indeed the available evidence indicates that Australia is the most popular origin of wine consumed on the domestic Singaporean market; it is estimated to account for around 1/3 of the domestic wine market, with five most popular brands of wine in Singapore are Australian. Some companies focus specifically in importing/distributing Australian wines. For example, Singapore Beverages Pte Ltd, the leader in wine sales in Singapore sells big Australian brands such as Penfolds, Lindeman's and Wolf Bass. That said, the market share of big brand Australian wines is shrinking as the market for niche products grows. Consumers like to try new wines and explore the variety of high-quality products from all over the world, and with increasing levels of consumer knowledge there are opportunities for European producers to try capture parts of the market. The consumption of niche wines especially has grown with the growth of online retail popularity.

However, the increased competition leads to the development of more innovative marketing techniques. With the large number of wine brands sold, exporters need to get creative to stay competitive. Those efforts may include lucky draws or holiday prizes. One negative aspect of the competitive market in Singapore is, that wine prices may come under pressure in the coming years due to many competing different brands.⁷⁴

5.4.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, wine in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, European do not face any duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hcode=2204>

⁷⁴ A quick guide to wine distribution in Singapore <https://www.tradegercko.com/blog/supply-chain-management/a-quick-guide-to-wine-distribution-in-singapore>; Euromonitor International: Alcoholic Drinks, 2020.

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for wine can be found on the website indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=2204&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of wine into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=2204&countryid=SG#h15>

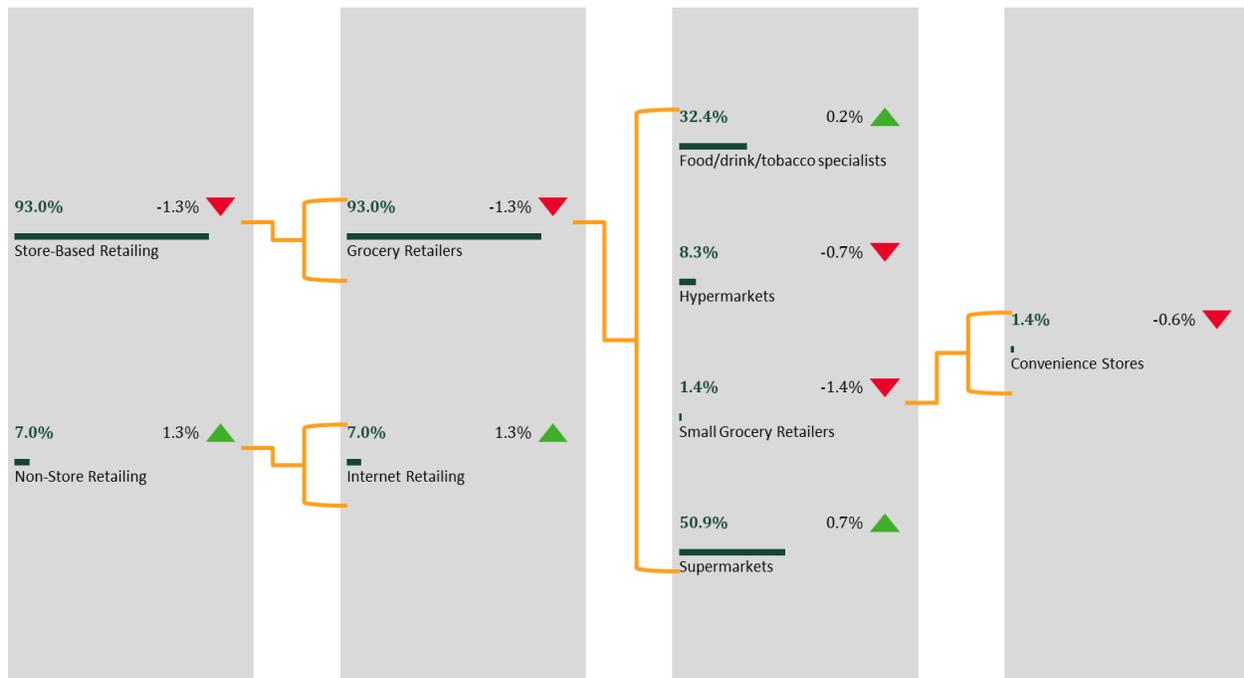
Labelling

Wine must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3.

5.4.5 Distribution

On- as well as off-trade sales are important for the wine business in Singapore. In volume terms, most wine – about 70% - gets sold off-trade. Among off-trade channels, supermarkets are dominant as depicted in Figure 5-18. Within off-trade, internet retail is becoming increasingly prominent and it the fastest growing off-trade channel in Singapore due to the high internet penetration within the country. In general, competition in Singapore is high. The city-state has over a hundred wine wholesalers and at least more than 300 wine retailers. Due to the preference of Singaporeans for Australian wines, some distributors are particularly focused on Australian wines.

Figure 5-18: Distribution channel overview of wine in Singapore (2018); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2020.

5.4.6 Challenges for EU products

Even though Singapore is a very good country for trading goods there are some specific challenges for the wine trade. The high sin-tax on alcohol makes wine more costly and hence impacts export volumes. Due to this tax all wines are very expensive in general, which is why Singaporeans tend to buy high-quality wines because the price difference is not so big anyway in relative terms. According to this the sin-tax is a challenge but also an opportunity because most wines from the EU are high-quality wines. However, the biggest challenge remains the preference of some consumers for geographically closer Australian wine, as witnessed by the five most popular brands in Singapore being Australian.

Market Takeaway: Wine

Consumption: Consumption is increasing rapidly, and consumers straddle all age groups and social classes.

Competition: EU wines have a strong position; though the main competitors are Australia (value – 1/3 of the domestic market share) and Chile (volume).

Distribution: 70% by volume through off trade, with supermarkets dominant but online gaining ground.

Challenges: Australia a notable competitor and Singaporeans like Australian wine the most.

Opportunities: consumers are increasingly open to new tastes and new products, driven by trends. Sparkling wine, and more specifically Prosecco has been a recent good performer. Singapore is a known re-export hub providing potential opportunities to enter not just Singapore but the wider region.

5.5 Spirits

5.5.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Bartenders are increasingly being trained to prepare spirit-based drinks of a wide variety. ▪ Business meetings and networking events are increasingly incorporating alcoholic beverages such as spirits. ▪ EU products such as Cognac and white spirits are popular in Singapore. 	<ul style="list-style-type: none"> ▪ Singapore is one of the world's most expensive countries to drink spirits. ▪ The government of Singapore actively advocates against alcohol consumption. ▪ Alcohol consumption in Singapore is one of the lowest per capita in Asia.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ A range of opportunities in the on-trade channel. ▪ Consumption of spirits is growing amongst the youth population of Singapore. ▪ A large expat community is likely to be more receptive to EU products. ▪ The EUSFTA provides GI protection for a large number of EU spirits. 	<ul style="list-style-type: none"> ▪ The government has implemented laws that restrict the sale and consumption of alcohol in Singapore. ▪ Korean soju has gained popularity among young consumers; and China's national liquor Baijiu is also gaining some traction in Singapore. ▪ Beer remains the largest consumed alcoholic beverage in Singapore.

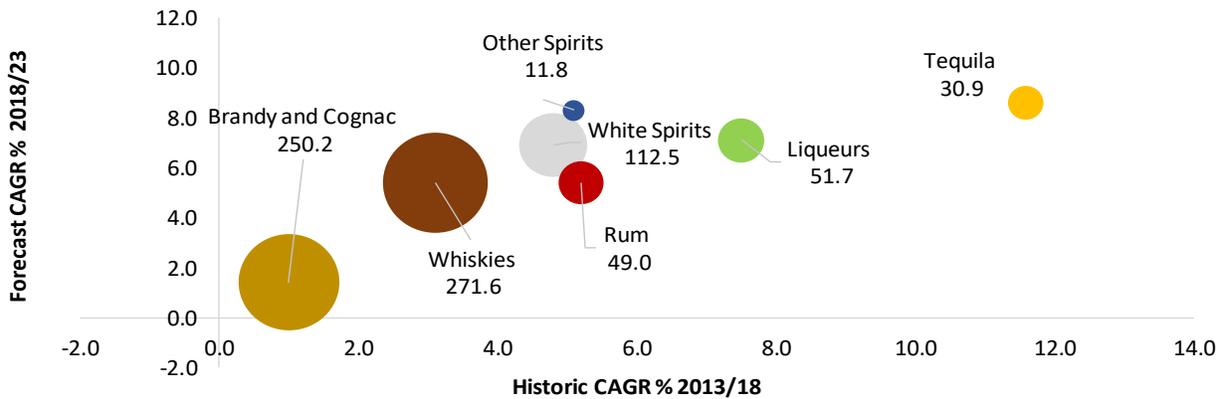
5.5.2 Consumption

5.5.2.1 Evolution of consumption

The sales of spirits in Singapore is gradually growing at a rate of 2% total volume CAGR to reach four million litres in 2023. Whisky had the highest market size in Singapore with a total value of EUR 271.6m and is expected to grow at an estimated rate of 5.4% CAGR between 2018-2023.

The second largest spirit is brandy and cognac which is not too far away from whisky with a total market size of EUR 250m in 2018. Brandy and cognac however are expected to grow at a much slower rate at just 1.4% through 2018-2023. White spirits have a market size of half that of brandy and cognac with a total value of EUR 112.5m. Other notable products include liqueurs at a market size of EUR 52m, rum at a market size of EUR 49m and finally tequila at a market size of EUR 31m (Figure 5-19).

Figure 5-19: Evolution and forecast of spirits market in Singapore, 2013-2023; total value, EUR millions



Source: Euromonitor International: Alcoholic Drinks, 2020.

5.5.2.2 Consumer profile and purchase criteria

Consumers

The consumption of spirits in Singapore is amongst the lowest in Asia and spirits have not been a key feature of the daily Singaporean lifestyle. The youth population of Singapore is more likely to drink cocktails containing spirits such as gin and rum. Older consumers are most likely to consume whisky, cognac and other higher quality imported spirits. Some of the most popular brands in Singapore include Scots Whisky, Pernod Ricard, Chivas Regal, and Absolute Vodka. Singapore being an extremely diverse nation lends itself to being attractive to multiple producers targeting specific consumers, who vary by e.g. ethnic and age groups. For example:

- Chinese:** Baijiu the national spirit of China is increasingly popular in Singapore. Baijiu is one of the world's most consumed spirits but is largely unknown outside of China, Singapore is largely viewed as a test market before expanding the product further and is attractive to Chinese migrants in the country. The Chinese are estimated to account for almost $\frac{3}{4}$ of the consumption of Baijiu in Singapore.⁷⁵
- Western Expats:** Expats are a common part of Singapore and have a significant effect on markets there. In regard to spirits, expats are likely to be younger and less brand loyal than older consumers. Having on average higher disposable incomes than other segments of the population allow Expats to splash out on premium spirits from the west such as Irish Whisky and Kentucky bourbon which is not generally popular amongst the average native Singaporean.
- Young Consumers:** Young consumers make up a large percentage of the growth rates of spirit consumption in Singapore as spirit and alcohol as a whole has not been a key element of the Singaporean culture. Young consumers are driving up demand for spirits used in cocktails such as gin and rum, and they are more open to changing preferences when compared to older consumers who typically will have a single preference. Indeed this is demonstrated by the fact

⁷⁵ Meet Baijiu, The bestselling liquor Singapore has never tasted <https://www.ricemedia.co/culture-food-baijiu-best-selling-liquor-youve-never-heard/>

that young consumers are the main group interested in Korean soju/sochu, which has quickly gained popularity in Singapore in recent years. Afterwork drinking and networking events provide many young consumers a scenario where spirit consumption is accepted and this is likely to remain a common feature of business life in Singapore.

Overall, men are the main consumer of spirits, though consumption among women is increasing, with the range of available products helping this. While the consumption of white spirits is particularly common among women, the popularity of whisky is also increasing, with some estimations indicating that up to 30% of whisky consumers may be female.

Drivers and method of consumption

Overall, on-trade is the main driver of spirit consumption in Singapore (see also section 5.5.5). It should be remembered that Singapore is home to many high end restaurants and bars (for example, seven of the best 50 restaurants in Asia – an area with 4.5bn inhabitants - have been rated to come from Singapore; as do three of the world's 20 best bars⁷⁶). With around 5 000 restaurants and bars across Singapore as a whole, there is on-trade demand for the whole range of spirits from economy to super premium.

Consumers are the most increasingly drinking spirit as an after-work activity and for social events; particularly younger consumers, as noted above. This is a result of the increased focus of companies on work related social activities in an attempt to even the work life balance. These events often combine food and drink. While beer is a major beneficiary of this trend, among spirits, this trend generally favours white spirits and whisky; in particular those which are used in cocktails. Gin is a particular beneficiary due to its common use in refreshing cocktails (the refreshing aspect being particularly popular in the humid Singapore climate).

The increase in pub and bar culture in Singapore has seen an increase in spirit consumption; however recent implementation of laws restricting the sale and consumption of alcohol in Singapore (see below) has threatened the progress of spirit consumption. Vodka is particularly popular at nightclubs and drinking only entertainment establishments. Business meetings and networking events are increasingly incorporating alcohol consumption which is common in other Asian countries but a relatively new concept in Singapore. Indeed, consumption of baijiu in particular is driven by this trend.⁷⁷

Laws restricting the sale of alcohol in Singapore

The legal drinking age of alcohol consumption is 18 and above in Singapore. The liquor (Supply and consumption) act prohibits consumption of alcohol in such public places and the sale of alcohol from retail outlets between 10.30pm and 7am. Certain areas including Little India and Geylang Seria are classified as Liquor control zones and laws governing alcohol consumption in these areas are even stricter. For more information please see: <https://singaporelegaladvice.com/law-articles/legal-drinking-age-singapore-drinking-related-laws/>

⁷⁶ <https://www.theworlds50best.com/asia/en/list/1-50>; <https://www.businessinsider.sg/6-of-the-worlds-best-bars-are-now-in-singapore-with-3-among-the-top-20>

⁷⁷ Euromonitor International: Alcoholic Drinks, 2020.

The Liquor Control (Supply and Consumption) Act 2015 can be found at:

<https://sso.agc.gov.sg/Act/LCSCA2015>

Purchase criteria

Singaporean consumers tend to value price as a key criterion for spirit consumption, with Singapore being one of the world's most expensive cities to purchase spirits. Different products have different criteria that determine the likelihood that a consumer will purchase them such as:

- **Cognac and whisky:** Most likely to be consumed by individuals with a large disposable income and a particular preference for this product most consumers of cognacs and whiskies are more likely to be swayed by the origin, brand of the product and smoothness of taste over the price and alcohol content. Among over 40s there is a preference towards smokier tastes and a favouring of cognac over whisky.
- **White Spirits:** The large variety of white spirits products allows consumers to expect producers to innovate in order to capture their attention, flavour plays a large role with brands like Absolut innovating and releasing in Singapore a number of flavours such as Absolut vodka lime and grapefruit to name a few. A combination of flavour, price and alcohol content plays a large role in the purchasing criteria of white spirits in Singapore. Women in particular are likely to focus more on taste, favouring lighter and refreshing spirits with a tinge of sweetness (whether alone or in cocktails). Subsequently, gin and flavoured vodka are quite popular among them. In contrast younger and lower income consumers are more likely to focus on the combination of price and alcohol content.
- **Liqueurs:** The price of liqueur in Singapore is quite high and it is common for travellers to bring a bottle into the country when traveling from abroad.⁷⁸ In bars there is a large variety of liqueurs available and method (Shot or cocktail), pricing and flavour play a large role in consumption.

Spirits on retailers' shelves in Singapore

As a general rule, retail prices for spirits are as follows

- **Economy:** under SGD 40/750ml
- **Medium:** between SGD 40 – 75/750ml
- **Premium:** above SGD 75/750ml

The majority of rum on the market falls into the economy pricing category, while white spirits, cognac and whisky more commonly fall in the premium category.

While price discounts are not common or generally successful, free gifts (such as a whisky glass) may be used to promote products during peak seasons.

⁷⁸ The import of duty free spirit purchases are only permitted if the passenger has been abroad in the destination country for a minimum of 48 hours. As a result of this and similarly high taxes in some neighbouring countries such as Malaysia, Singaporeans do not tend to visit neighbouring countries specifically to purchase spirits.

Generally, a premium look is important for spirits. In addition to this, anti-refill closure is fairly standard as a way of ensuring the authenticity of the liquid inside. One way that some more premium brands have created excitement around their products is through the use of limited edition designs. Brands aiming at younger consumers have tried to use more innovative and eye-catching packaging (e.g. copper coating on a transparent bottle). Premium packaging typically emphasizes the specific properties of the product; and in some cases, packaging for mid-range and economy products does as well.



Both 700ml and 750ml bottle sizes are common in Singapore.

Pictures: © Agra CEAS / Euromonitor International, 2020.

5.5.2.3 Recent market trends

The outlook for spirits in Singapore remains positive, with annual growth rates of over 5% forecast for all categories except brandy/cognac over the 2019-2023 period. Most notably the growth rates for tequila and other spirits exceed 8% per year. A business culture that is increasingly incorporating spirit consumption into business events and networking is expected to help accelerate growth rates.

Strong cocktail culture has continued to grow in Singapore, with a growing number of bars incorporating these cocktails into their selections. Bartenders in Singapore are also becoming more innovative with their

cocktails to entice consumers to drink in their establishments. Emerging trends include the use of local ingredients such as tea into cocktails; and cocktails that incorporate unique and exotic ingredients are likely to see the biggest growth rates as the target younger population that lacks a brand loyalty mindset and is more open to drinking a variety of cocktails. One example that demonstrates the growth of the popularity of spirit consumption is the creation of the gin tour in Singapore, the first of its kind outside of the UK.⁷⁹

This cocktail culture has seen strong increases in sales of spirits commonly used in cocktails (gin and rum in particular) at the expense of mainstream vodka brands. Indeed, craft gin in particular has been a particular beneficiary of this trend, with the emergence of dedicated gin bars and the premiumisation of gin cocktails benefiting this sub category. Some producers of all types of alcohol have tried partnering with bars or food establishments to create or promote signature cocktails which use their brand of spirit. Among higher end spirits, some producers have also partnered with high end bars to launch limited edition versions of their spirits.

5.5.3 Offer

5.5.3.1 Domestic production

Singapore lacking a large amount of agricultural space leads to a situation where virtually all of the ingredients required for spirit consumption has to be imported from abroad. Nonetheless, small independent distilleries are gaining in popularity in Singapore. In 2018 Singapore saw the opening of two local micro distilleries named Tanglin Gin and Brass Lion Distillery who specialize in producing gin that incorporates Asian ingredients such as dendrobium child kaffir lime. Compendium is a local producer which makes a wider range of spirits, including rum and honey mead. These initiatives prove that spirit production in Singapore is possible and likely to grow if the market continues to grow too. Domestic production is therefore small but growing.

However, the Singaporean spirit industry is dominated by companies which import and re-export spirits (generally from Europe and Australia, sending on to other countries in the region). Larger companies tend to have their own local subsidiary which engages in this practice; while a range of traders and distributors exist in Singapore who engage in re-export, primarily of the products of smaller producers who do not have their own local subsidiaries.

5.5.3.2 Imports and exports

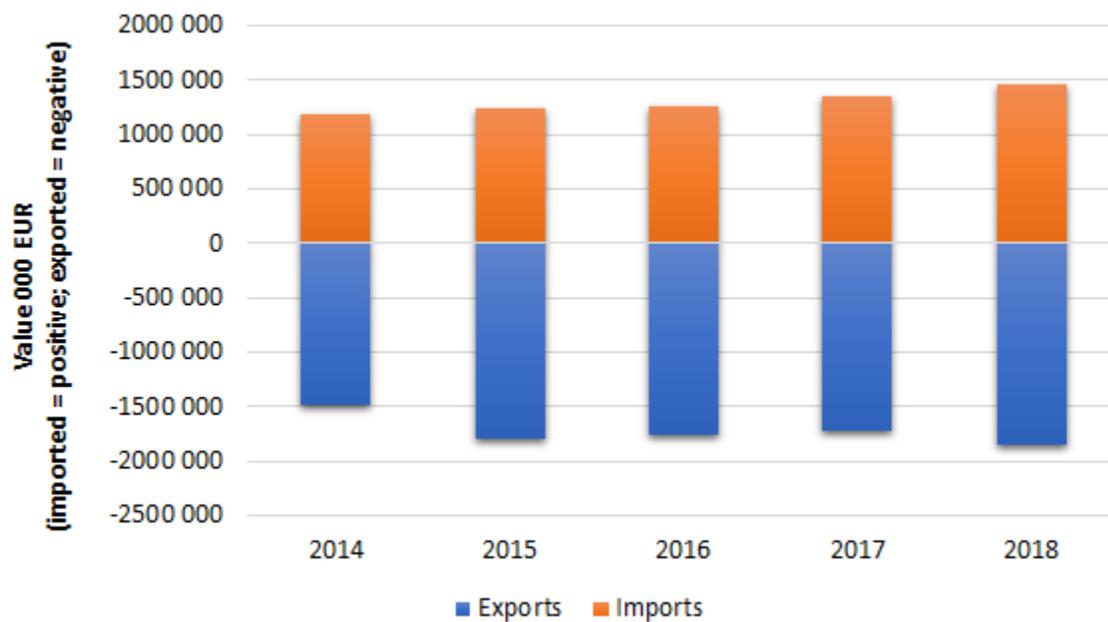
As Singapore acts as major transit hub for goods destined for wider Asian markets such as Vietnam and China it becomes difficult to narrow down how much spirit products enter and leave the Singaporean market. It is reasonable to assume that Singapore exports a negligible amount of domestic spirit product due to the lack of domestic production, with Tanglin gin and Brass lion distillery being rare examples. With this assumption, in volume terms, it can be estimated that 80-85% of the spirits which are imported into

⁷⁹ This new regular bar tour in Singapore is for the gin lovers <https://www.ricemedia.co/culture-food-baijiu-bestselling-liquor-youve-never-heard/>; Euromonitor International: Alcoholic Drinks, 2020.

Singapore are subsequently re-exported. However, the declared unit value of the re-exported spirits is higher than their declared imported value, meaning that the overall value of exported spirits outweighs the value of imported spirits (see Figure 5-20).

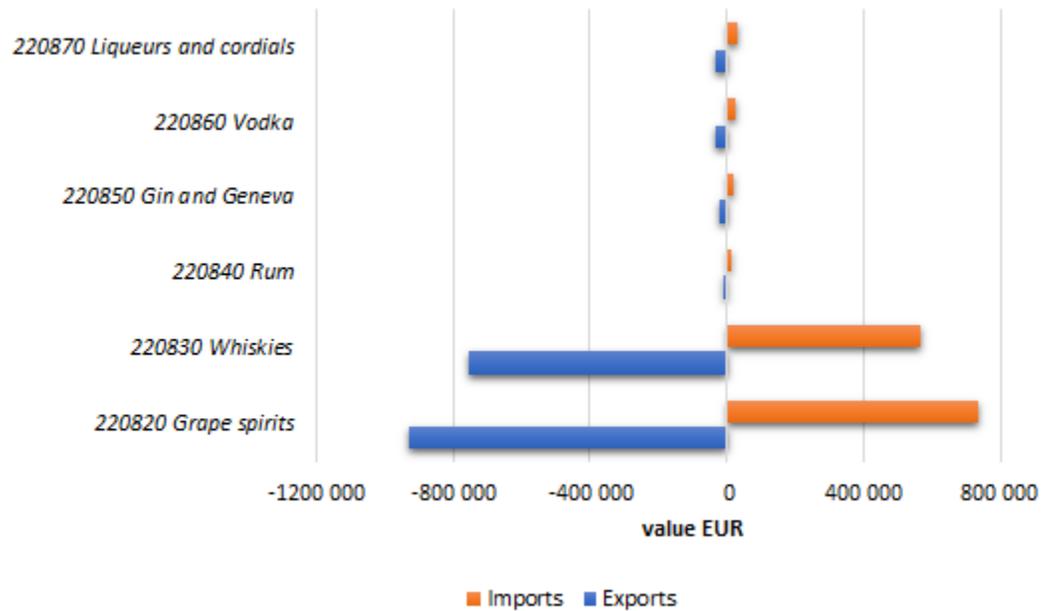
In view of the consideration above it is difficult to draw conclusions on imports of different spirits by type which are imported for consumption in Singapore. However, it can be seen that whiskies and grape spirits dominate import and (re)export (Figure 5-21)

Figure 5-20: Trade balance (imports and exports) of spirits in Singapore, 2014-18; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2208.

Figure 5-21: Trade balance (imports and exports) of spirits in Singapore, by type, 2018; EUR 000

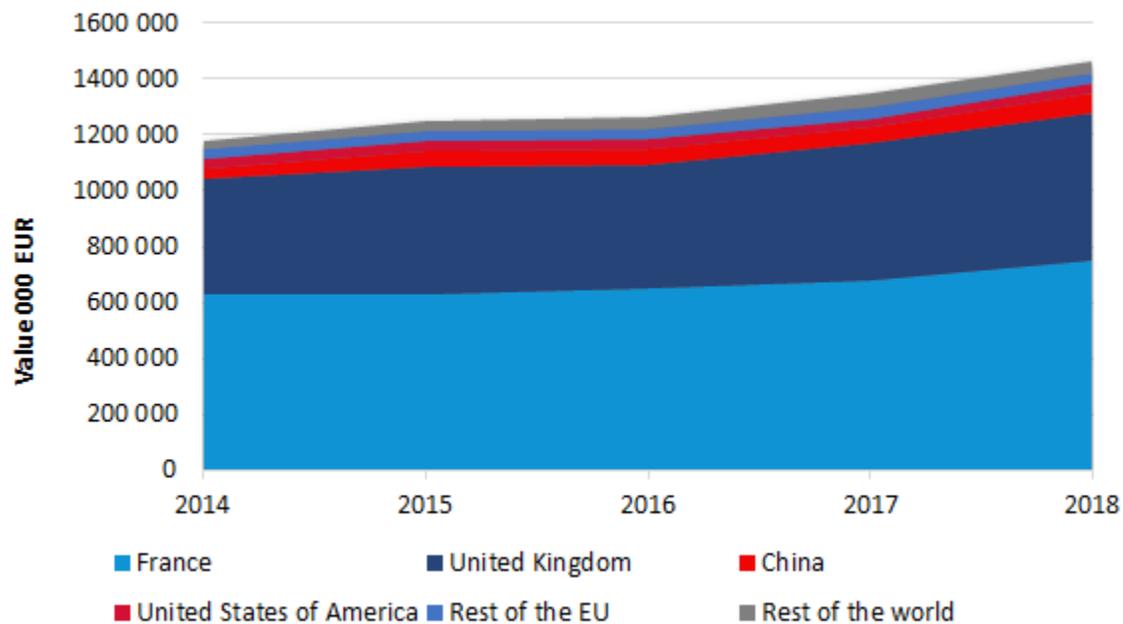


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Spirit names shortened. CN codes before spirit name.

Singapore imports a large number of its spirits from France and the UK (mainly grape spirits and whiskies respectively) with a sizable amount also arriving from China and the USA (Figure 5-22).

Figure 5-22: Singaporean imports of spirits by country, 2014-18; EUR 000



Source:

Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2208

5.5.3.3 EU GI products

Several EU GIs for spirits were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing include:

- **Austria:** Jägertee / Jagertee / Jagatee, Inländerrum
- **Cyprus:** Ζιβανία/Τζιβανία/Ζιβάνα/Zivania
- **Finland:** Suomalainen Vodka/ Finsk Vodka / Vodka of Finland, Finnish berry liqueur / Finnish fruit liqueur
- **France :** Cognac, Armagnac, Calvados
- **Germany :** Korn/Kornbrand
- **Greece:** Ούζο/Ouzo
- **Hungary:** Törkölypálinka, Pálinka
- **Ireland:** Irish Whiskey/ Uisce Beatha Eireannach/ Irish Whisky, Irish Cream
- **Italy:** Grappa
- **Poland:** Polska Wódka/Polish Vodka
- **Spain:** Brandy de Jerez
- **Sweden:** Svensk Vodka/ Swedish Vodka

This list is non-exhaustive; section 9 can be consulted for a full list.

5.5.3.4 Main competitors

Spirits is one of the sectors in Singapore to offer EU producers a large share of the market – around 50% of EU imports. France (cognac) and the UK (whisky) are the two largest exporters of spirits to Singapore and spirits like cognac and scotch whisky are amongst the most popular spirits consumed in Singapore. As well as the UK, China and the USA pose a competition to EU producers with Bourbon from the USA and Baijiu from China being popular in Singapore as well. However, when considering importers based on trade data it must be remembered that an estimated 80-85% of imports are subsequently re-exported.

5.5.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, spirits in Singapore fall into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European spirits imported into Singapore do not face duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=2208>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for spirits can be found on the website indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=2208&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of spirits into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFpubli.htm?doc=overview&hscod=2208&countryid=SG#h15>

Labelling

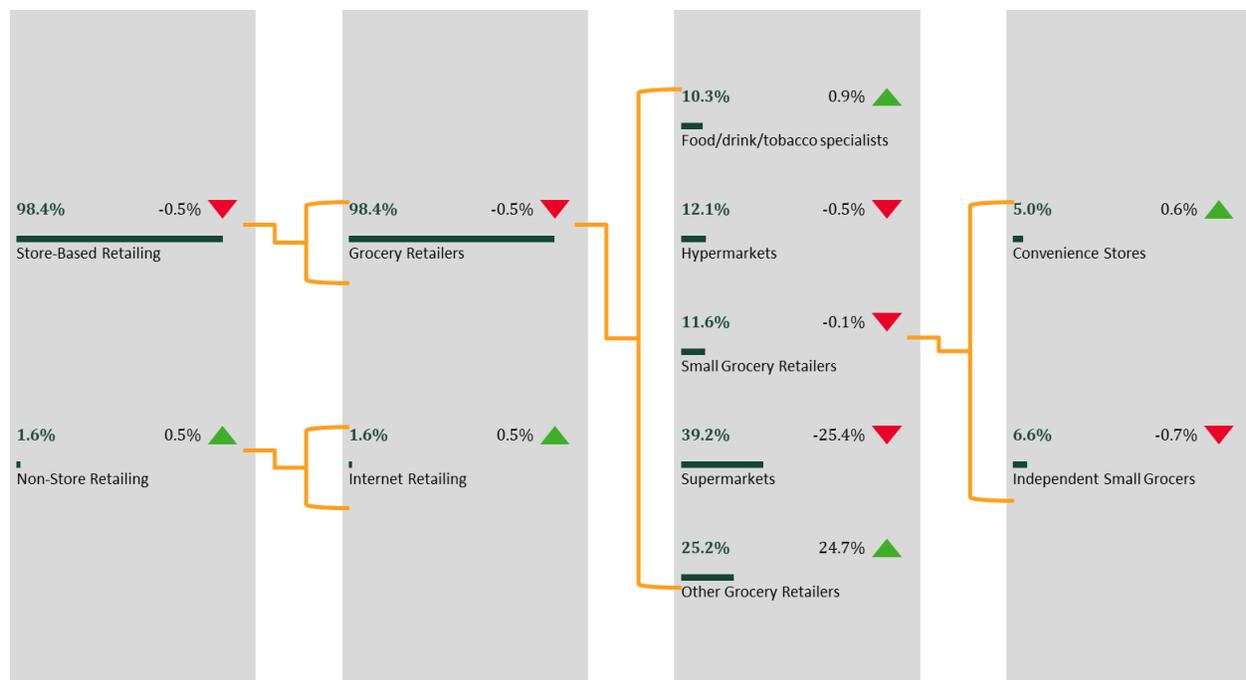
Spirits must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3 .

5.5.5 Distribution

The distribution of spirits in Singapore comes almost entirely from grocery retailers in the country at 98.4%. All types of grocery retailers account for a fair share of distribution, though supermarkets are the most important channel. Grocery retailers however are increasingly under pressure due to government laws restricting the sale of alcohol for the hours of 10.30 pm – 07.00 and the rise of internet retailing. However grocery retailers will remain the main source of spirit products in Singapore for years to come (Figure 5-23).

However, it should be noted that the graph shows off-trade volume sales. On-trade volume sales from bars and clubs for example are of key importance; they accounted for almost 85% of the distribution of spirit products in Singapore in 2018 compared to just 15% for off-trade.

Figure 5-23: Distribution channel overview of spirits in Singapore (2018); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2020.

5.5.6 Challenges for EU products

Challenges for EU products include entering a market that has one of the lowest levels of alcohol consumption in Asia coupled with a government that is increasingly advocating against the consumption of alcohol by limiting its sale and consumption hours and areas in recent laws. Singaporeans are however increasingly consuming spirits at social events and after-work activities which give EU producers room to sell their products. Spirits represent one of the key sectors in Singapore where the EU have a sizable share

of the market and looking towards the forecast years and the EUSFTA it is likely that EU producers, led by France, will remain on top.

Market Takeaway: Spirits

Consumption: Consumed at clubs and increasingly in pubs and bars, consumed as an after-work activity or during social events. A wide range of spirits are consumed.

Competition: Bangui and Bourbon from China and the USA respectively are popular and provide consumers an alternative choice from EU products. Korean soju and emerging threat.

Distribution: on-trade is of key importance, accounting for 85% in volume terms. Grocery retailers dominate among off-trade outlets.

Challenges: The government is actively advocating against alcohol consumption in a country that already has one of the lowest levels of alcohol consumption in Asia.

Opportunities: various differing opportunities in the on-trade channel. Consumption is rising amongst the youth population who are less likely to have brand loyalty and are more open to trying a variety of spirits. Cocktails increasingly popular.

5.6 Olive oil

5.6.1 SWOT analysis

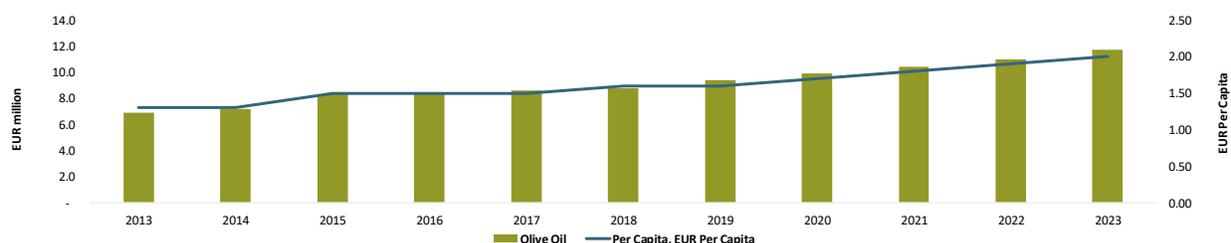
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> A large expat community that is likely to be accustomed to olive oil consumption, though local Singaporeans are increasingly important. Imports from Spain and Italy have grown each year since 2015. 	<ul style="list-style-type: none"> Olive oil is expensive and is largely imported from Spain and Italy which drives up already high costs for consumers. Foods that olive oil compliment play a large role in the preference of the product.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> The health benefits of olive oil is gradually resonating with some Singaporeans and there exists a very small niche market of consumers that consumes olive oil for health purposes. Interest in a range of products is increasing, with organic products and new flavours emerging recently. 	<ul style="list-style-type: none"> The average Singaporean consumer is not accustomed to the consumption of olive oil. Concerns about the authenticity of some products has increased consumer scrutiny, though many brands have taken proactive steps to appease these for their products.

5.6.2 Consumption

5.6.2.1 Evolution of consumption

Olive oil consumption in Singapore is slowly growing but remains a largely uncommon product. The retail growth rate of Olive oil in Singapore grew 4.5% in 2019 and is expected to see steady growth for the foreseeable forecast period which will lead to a market retail value of roughly EUR 12m by 2023, up from around EUR 9m in 2018. Despite the steady growth the market is expected to remain small. Per capita consumption is forecast to reach 0.2 litres per person by 2023.

Figure 5-24: Evolution and forecast of market for olive oil (value, EUR millions) and olive oil consumption per expenditure, in Singapore; 2013-2023



Source: Euromonitor International: Packaged Food, 2020.

Note: figures for 2019 to 2023 based on forecasts.

5.6.2.2 Consumer profile and purchase criteria

Consumers

The consumption of olive oil in Singapore is low and the product is not common in the country. Olive oil products struggle to break in this market due to the unfamiliarity of this product outside of western expat communities, which has historically been the main consumer group. However, in recent years the number

of local Singaporeans consuming olive oil has increased, and now the market is split roughly 50:50 between expats and local Singaporeans. The rise in health concerns has been a major driver for this shift.

Consumers of olive oil – whether local or expat – are generally over 25 with mid to high levels of income, due to the product's fairly high price. There is a segment of the Singaporean population who consume olive oil for medicinal reasons however this consumer group is very small.

Drivers and method of consumption

Historically in Singapore olive oil has not been used commonly for cooking and has been used mostly as a substitute item to enhance the flavour of other products such as salad dressings in western restaurants. However, with an increased focus on health, there is a group of consumers that is increasing using olive oil for cooking as well, despite its high price. There remains a small segment of the population who specifically consume olive oil as a medicine or for other health reasons – whether for its antioxidants, potential positive impacts on heart disease, or anti-inflammatory properties - but this segment of the population is extremely niche.

Purchase criteria

As olive oil is commonly used as a substitute good for other existing products the purchasing criteria can often depend on the goods olive oil is complimenting. Overall, extra virgin olive oil is preferred, though other qualities are purchased in certain situations (e.g. cooking).

Olive oil is generally highly priced in Singapore due to its scarcity and costs associated with importing the good into the country coupled with the general high cost of living in Singapore. As a result of this, consumers may pay attention to price; and for the growing group of consumers who use olive oil in cooking, price is likely to be a major criterion.⁸⁰

Finally, brand can play a role in the purchasing decision, with importance place on brands for their trustworthiness. This importance of brand emerged in the second part of the 2010s due to a series of reports of fake olive oil in Singapore. Some popular brands such as Naturel have run market activities (including on social media platforms) to engage with consumers against this background. Despite this, higher end consumers have shown a willingness to try new, premium olive oil brands as long as their concerns about trustworthiness can be appeased.

Olive oil on retailers' shelves in Singapore

In terms of price, olive oil typically retails at the following prices:

- **Economy:** under SGD 15 / litre
- **Mid-range:** SGD 15 – 50 / litre
- **Premium:** over SGD 50 / litre

⁸⁰ Euromonitor International: Packaged Food, 2020.

Olive oil is available in a range of bottle sizes in Singapore from 100ml upwards; though 500ml is the most common size. Large (e.g. 1 litre) bottles are only really common for the economy segment. Olive oil tends to be grouped together among other oils and condiments, with a reasonable amount of space dedicated to the product (see images below).





Pictures: © Agra CEAS / Euromonitor International, 2020.

5.6.2.3 Recent market trends

Olive oil saw a growth rate in Singapore of 4.5% in 2019 and is expected to keep growing but the market in general is quite small with a retail value of around EUR 9m. As noted above, it is expected that Olive oil will grow to a retail value of approximately EUR 12 m by 2023.⁸¹

Notable recent trends which stand out include:

⁸¹ Euromonitor International: Packaged Food, 2020.

- **An increase in demand for organic olive oil**, with organic products from some companies such as Global Organics and Terra Creta proving quite popular.
- **New flavours** (e.g. scented / infused olive oils), with oregano, saffron, basil, rosemary, white truffle, and lemon olive oil products being launched, backed up by consumer engagement to increase awareness of them.
- **Focus on brand, authenticity and quality**; against the background of authenticity concerns set out in the last section, this is unsurprising. Many brands have tried to ensure information on the product and its authenticity/quality is readily available to consumers. Going one step further, some players have invested in social media marketing to raise brand awareness.

Finally, it should be noted that the Singaporean government has introduced a regulation to ban artificial trans-fats and partially hydrogenated oil. The ban will take effect in 2021, allowing the industry to make the necessary adjustments to its products. This has led to global and local health organisations including Singapore's Ministry of Health encouraging consumers to use naturally occurring, unhydrogenated vegetable oils that are richer in polyunsaturated fatty acids – including olive oil - more often. This may in turn have a positive impact on demand for olive oil going forwards.

5.6.3 Offer

5.6.3.1 Domestic production

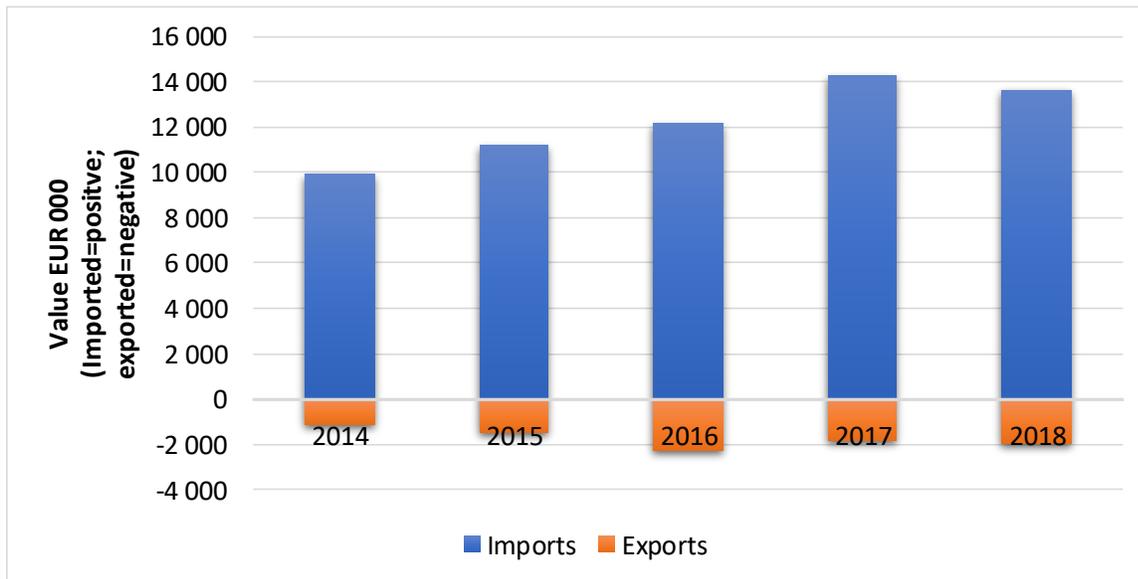
As is common in Singapore, the lack of domestic production leads to a situation where Singapore must import from abroad and Olive oil is not an exception, with no actual production of olive oil identified in the country.

Domestic distributors such as the Lam Soon Singapore sell organic olive oil however the products come from Spain which is a common trend throughout the olive oil market in the country, with importers such as Niche Market Exchange Pte and Lipid Global Pte involved in the import and marketing of products (the former specifically in Tunisian olive oils).

5.6.3.2 Imports and exports

Against the background above, Singapore is unsurprisingly a significant net importer of olive oil. Imports reached almost EUR 14m in 2018, having grown since 2014 but peaking in 2017. The exports which exist can be assumed to be the re-export to other countries in the region of the imported products (Figure 5-25); though it should be noted that overall, the re-export phenomenon is not common for olive oil (unlike for some other products such as alcohols).

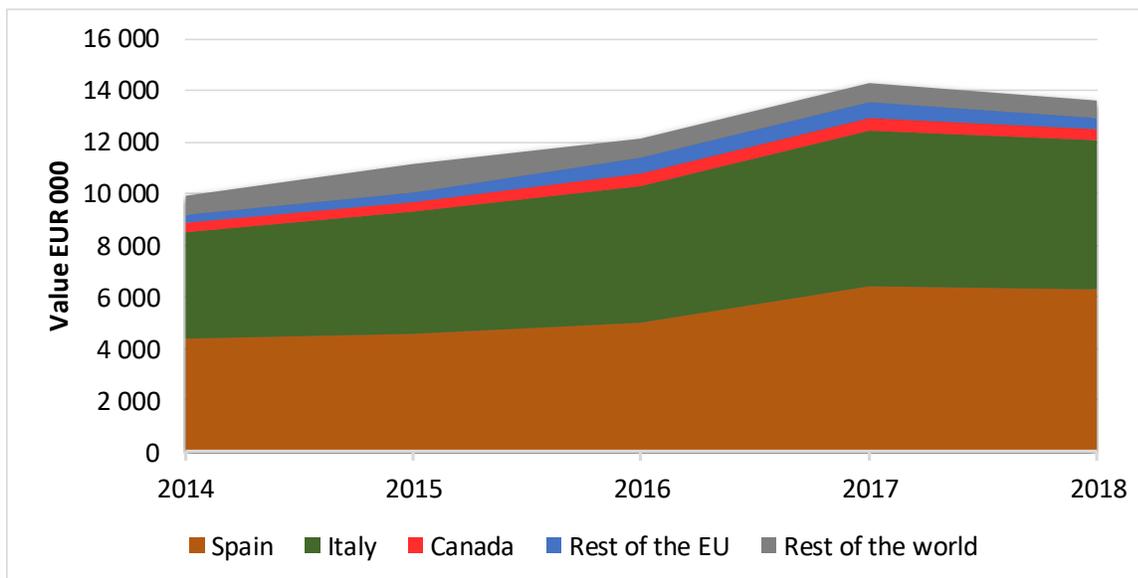
Figure 5-25: Trade balance (imports and exports) of olive oil in Singapore, 2014-2018; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1509.

In terms of origin, Spain and Italy dominate, each accounting for about 45% of imports, or 90% combined (Figure 5-26).

Figure 5-26: Singaporean imports of olive oil by country, 2014-2018; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1509.

5.6.3.3 EU GI products

A few olive oil GIs were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing are:

- **Spain:** Baena, Les Garrigues

It is recommended to consult section 9 for a full list of those which were listed for protection but have not completed registration (so are currently not protected).

5.6.3.4 Main competitors

While Spain and Italy are the largest exporters of Olive oil to Singapore, the market is quite small. Canada, Australia and Turkey also export olive oil to Singapore however at a much small rate than Italy and Spain, and Tunisian olive oil is beginning to enter the market. Despite this, it is foreseeable that Spain and Italy will be the two largest players in the Singaporean markets for the foreseeable future.

5.6.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, olive oil in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European olive oil products not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=1509>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for olive oil can be found on the website indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=1509&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of olive oil into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=1509&countryid=SG#h15>

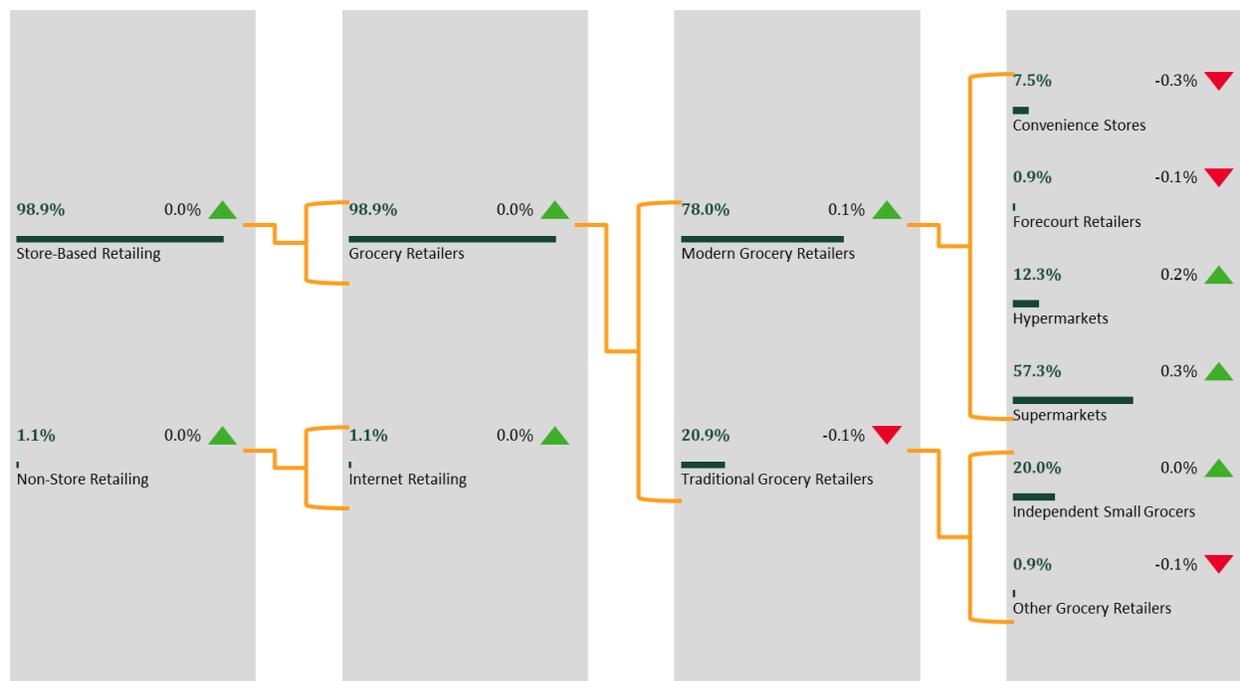
Labelling

Olive oil must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. As it is an edible oil, olive oil requires date marking (as also set out in section 4.2.3).

5.6.5 Distribution

As observed in Figure 5-27, grocery retailers distribute practically all edible oil products (including olive oil products) in Singapore. Of these grocery retailers, modern grocery retailers account for 78 % of this trade while traditional grocery retailers account for 21% of the distributed edible oil products. While this general oil market trend holds true for olive oil, the independent/small grocers tend to be food specialists retailing only organic/healthy products; and their importance for olive oil retailing is falling at the expense of supermarkets. Finally, due to Singapore’s well developed and varied food service industry, the on-trade channel is important for olive oil.

Figure 5-27: Distribution channels overview of edible oils (including olive oil) in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

5.6.6 Challenges for EU products

The main challenges for EU products come from the lack of familiarity of olive oil amongst the Singaporean population and the product’s high price. The government of Singapore is also engaging in a healthy eating

campaign which puts limits on certain products that may use olive oil as a dressing. It is expected that the market for olive oil in Singapore will remain small but will experience stable growth during the forecast period up until the year 2023.

Market Takeaway: Olive oil

Consumption: Consumed as a dressing for other products or for medicinal purposes in Singapore, though there is a group of consumers increasingly using it for cooking as well.

Competition: Limited competition from Canada and Australia however Italy and Spain are the dominant players.

Distribution: Commonly sold in Hypermarkets and supermarkets with a notable minority of smaller, specialist retailers. On trade also important.

Challenges: Lack of familiarity amongst the Singaporean population and the fairly high price limits consumption.

Opportunities: The range of products available is increasing, and health concerns – including an expected ban on trans-fats – may provide tail winds for olive oil demand.

5.7 Chocolate and confectionery

5.7.1 SWOT analysis

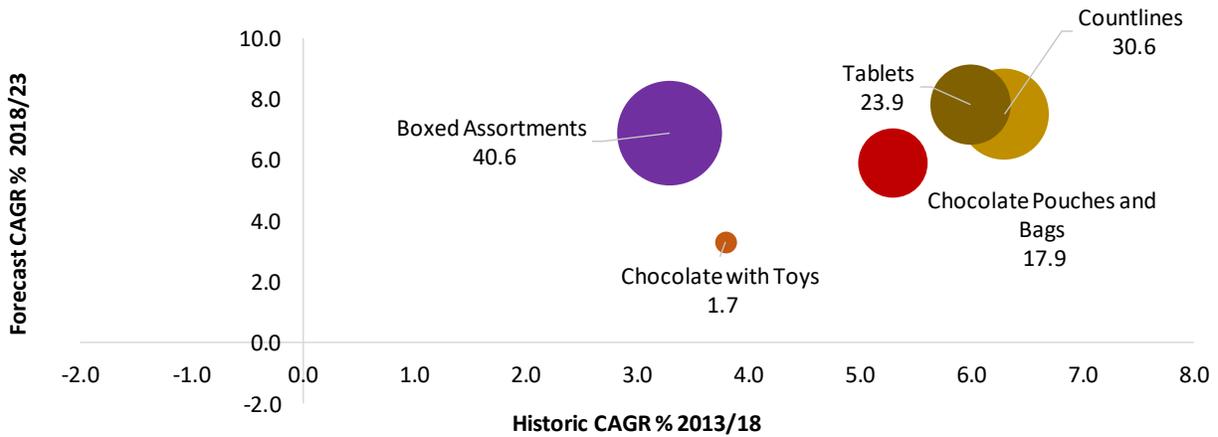
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Gift giving mentality. ▪ Open to new flavours and brands. ▪ Among chocolate, various European boxed assortments are well-known and regarded in Singapore. ▪ Singapore is used to some extent as a hub for re-export of confectionery products to the wider ASEAN region. 	<ul style="list-style-type: none"> ▪ Many products from other countries such as Asian countries and the USA are popular. ▪ Singapore is a net exporter of chocolate confectionery.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Premiumisation, trend towards high quality products (especially chocolate). ▪ Interest in healthier chocolate and confectionery. ▪ Market seems good especially for European chocolate products such as Boxed chocolate confectionery, mints, medicated confectionery and pastilles, gums, jellies and chews. 	<ul style="list-style-type: none"> ▪ Main exporters of confectionery are not European. ▪ Lots of choices available and market is already quite saturated.

5.7.2 Consumption

5.7.2.1 Evolution of consumption

The total value of the chocolate confectionery market was close to EUR 115 million in 2018. The categories of boxed assortments (EUR 40.6 million), countlines (EUR 30.6 million) and tablets (EUR 23.9 million) account for the majority of consumption in value terms; over 80 percent combined. Countlines and tablets are the categories that experienced the fastest growth between 2013 and 2018, with an CAGR of around 6%. In the same timeframe boxed assortments only grew at a CAGR of a bit more than 3%; comparatively slowly though it accounts for close to 35% of the whole chocolate confectionery market. However in coming years, between 2019 and 2023 the category is forecast to grow at a higher CAGR of about 7%. In general, the chocolate sector is forecast to keep growing in the coming years.

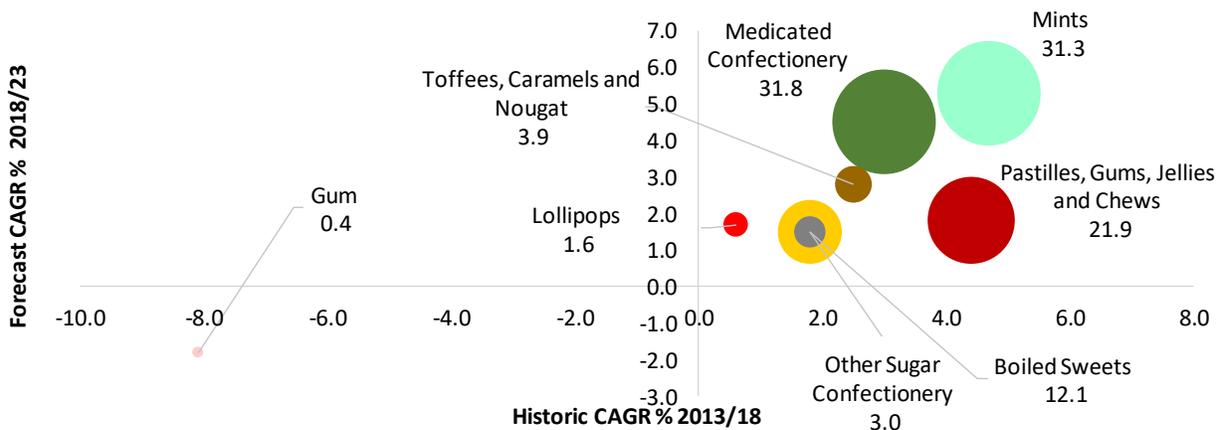
Figure 5-28: Evolution and forecast of chocolate confectionery market in Singapore, 2013-2023; total retail value EUR million



Source: Euromonitor International: Packaged Food, 2020.

The total sugar confectionery markets value is circa 7% less than the one for chocolate at about EUR 106 million in 2018. In value terms the three biggest markets are for medicated confectionery (EUR 31.8 million), followed closely by Mints with EUR 31.3 million and pastilles, gums, jellies and chews with approximately EUR 22 million. Those three categories made up about 80% of the total market in 2018. The biggest CAGR was seen for mints section, which grew nearly 5% between 2013 and 2018. The category with the second biggest CAGR was pastilles, gums, jellies and chews, which grew by close to 4.5% in the same time frame. Notably the sectors for mints, medicated confectionery and toffees, caramels and nougat are forecast to have the highest CAGR in coming years as visualised in Figure 5-29. The market for chewing gum in Singapore is almost non-existent, with the chewing of gum in public banned and only the import of chewing gum with therapeutic value permitted.

Figure 5-29: Evolution and forecast of sugar confectionery market in Singapore, 2013-2023; total retail value, EUR million



Source: Euromonitor International: Packaged Food, 2020.

5.7.2.2 Consumer profile and purchase criteria

Consumers

Overall, confectionery consumers span all ages and social groups. Some people prefer high-quality chocolate confectionery products and others enjoy countlines more; or a mix of different types. Sugar confectionery is often perceived as a treat for children, which is why the older generations do not consume a lot and tend to prefer chocolate instead. On the other hand, the younger generations, who grew up with sugar confectionery enjoy it a lot, even after becoming adults as it makes them feel nostalgic and it feels familiar to them. More luxury chocolates are typically purchased by older consumers.⁸²

Drivers and method of consumption

Chocolate confectionery is perceived to be something good and positive and is supposed to make people happy. Therefore it is often bought for special occasions and gifting; this is particularly true of boxed assortments. However, for the same reasons it is also purchased for self-indulgence and is often eaten as a small snack at some point during the day to treat oneself; though countlines and tablets are more commonly consumed in this way.

The health-trend is driving chocolate consumption - dark chocolate in particular - over sugar confectionery, which can be perceived as comparatively unhealthy. One important driver is premiumisation. Singaporean consumers have rising disposable incomes and prefer to buy high quality premium products that are usually more costly.

The general love of sugar confectionery often combined with good childhood memories are driving the consumption in this particular sector. Moreover, this sector is highly innovative when it comes to new flavours and innovative combinations and thus fulfils the consumers wish for novelty.

Purchase criteria

For chocolate confectionery, high-quality and brand are the two most common main criteria; with attention often paid to origin as a consequence of this. However, high-quality does not seem to play a big role in the purchase decision for sugar confectionery. For this category the brand as well as level of innovation that went into a product decides which product gets bought. For young adults, often there is a conflict in the purchasing decision: childhood memory vs. new exotic products. Overall, new and exotic flavours are quite popular in Singapore for both sugar and chocolate confectionery and likely to attract consumers, at least in the short term.

Moreover consumers are diverse, yet the average consumer ranks taste as the number one importance, followed by texture and quality. Singaporeans enjoy sweet chocolate more than consumers in other Asian countries. Consumers also enjoy crunchy textures, and this can be seen for example in consumer

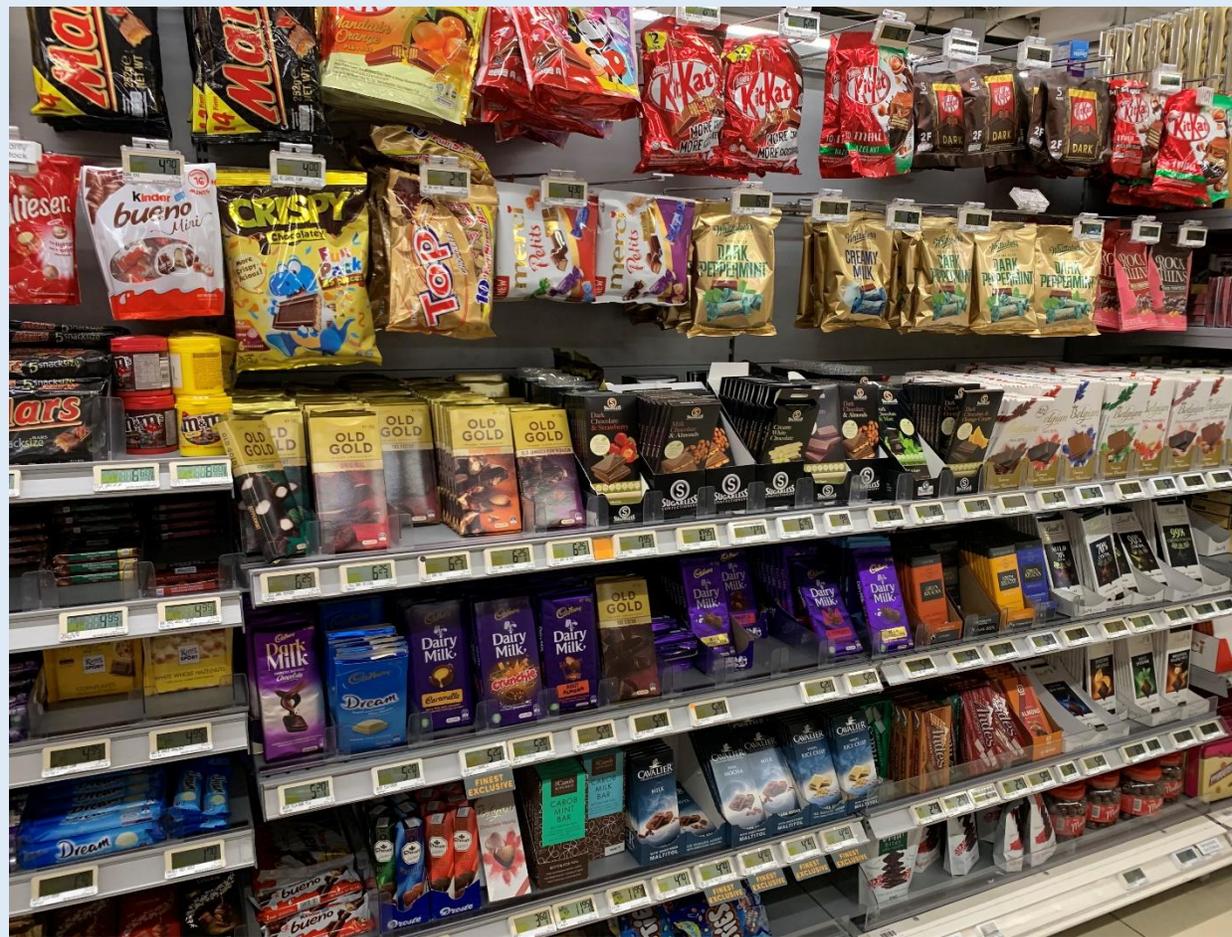
⁸² <https://www.confectionerynews.com/Article/2016/09/19/What-are-Asian-consumers-looking-for-in-chocolate-Kadence-research>; <https://www.confectionerynews.com/Article/2016/09/19/What-are-Asian-consumers-looking-for-in-chocolate-Kadence-research>

preferences for tablet chocolate; tablets with nuts (whether almonds macadamia, hazelnut or other) are the most popular type of tablets in Singapore, ahead of plain tablets in second place. These various taste preferences are similar for sugar confectionery. At the other end of the spectrum, liquorice is a flavour to avoid in both chocolate and sugar confectionery, as consumers are not acquainted with the sweet-bitter-sour taste of it.⁸³

Confectionery

The range of products on the market and channels through which they can be purchased makes it difficult to generalise on prices for confectionery. However, as a very broad rule, in the case of chocolate confectionery price ranges tend to be as follow:

- **Economy:** between SGD 0.9- 3.85 /100gm
- **Mid-range:** between SGD 3.85- 6.80/100gm
- **Premium:** above SGD 6.80/100gm

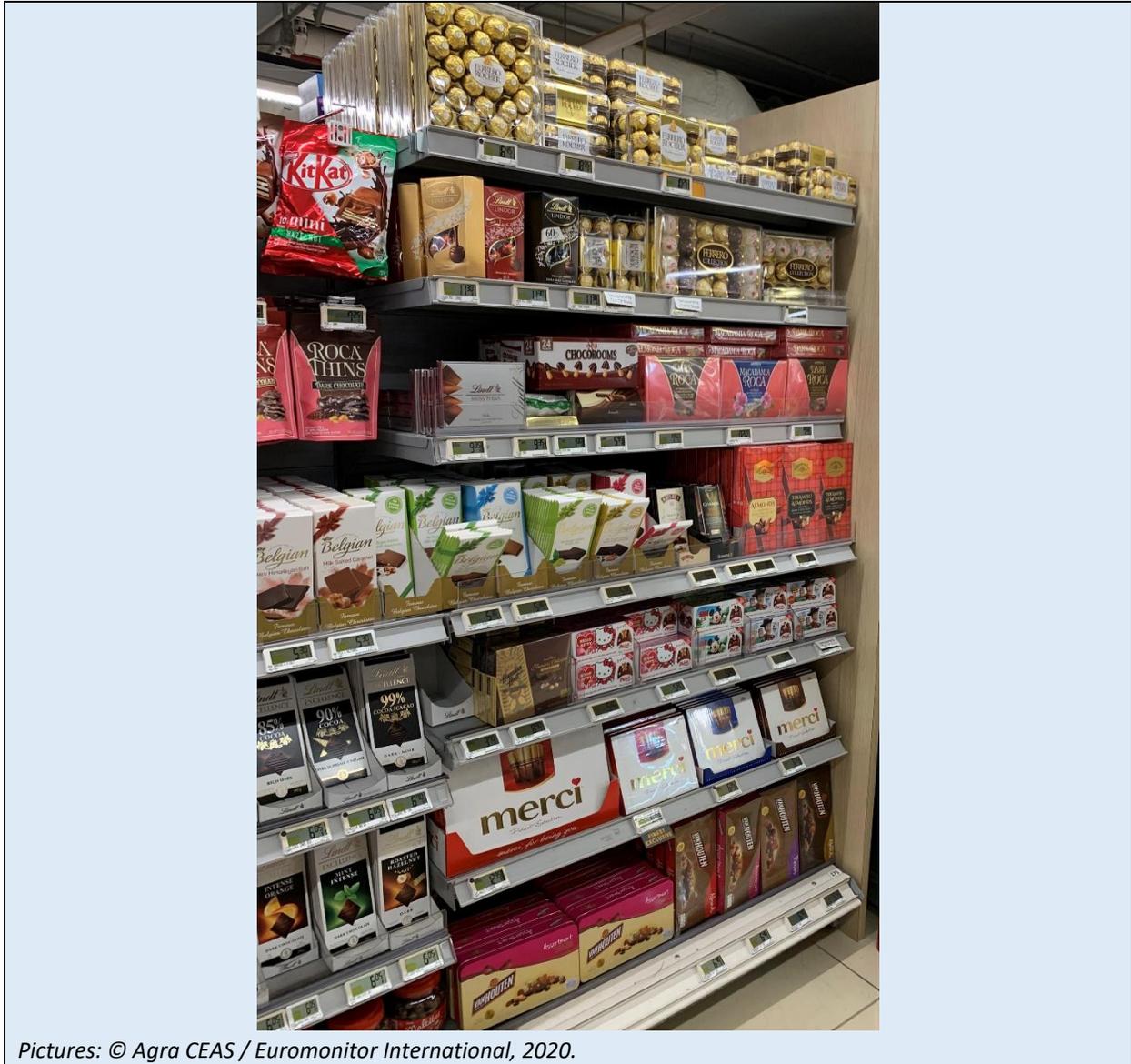


Packaging depends on the type of confectionery. Paper-based containers are more common for more premium products, including boxed assortments and higher end tablets. For pouches and bags,

⁸³ Euromonitor International: Packaged Food, 2020.

resealable containers with zip or press closures. However, with manufacturers trying hard to differentiate their products, the nature and design of packaging does vary. Some producers do use seasonal packaging and/or co-branding to attract consumers (see above and below).





Pictures: © Agra CEAS / Euromonitor International, 2020.

5.7.2.3 Recent market trends

Most chocolate categories are forecast to grow quickly in coming years. Notably tablets are forecast to grow at 7.8% per year over the period 2019-2023, and countlines at 7.5% per year, outstripping their already strong performance in recent years. The following trends in chocolate confectionery stand out:

- Recent growth in countlines, caused in particular by on the go consumption of Singaporeans, whereas the growth in demand for chocolate boxes is due to the increased giving of chocolate as gifts. Chocolate boxes are mostly gifts for special occasions or during festive times.
- Due to the premiumisation trend, chocolate from artisanal shops have been particularly favoured by consumers in recent years and thus, more artisanal shops have opened in of late. That said, some manufacturers have intentionally targeted the “affordable premium” niche recently in order to attract the more price sensitive consumer looking for products with a certain level of

luxury. Products targeting this segment typically either do not contain as exotic flavours or blend multiple flavours into one pack to compensate.

- Many consumers are interested in new and innovative flavours, as well as in healthier chocolates, such as sugar free ones. Some organic chocolate has even appeared on the market.
- Miniature versions of popular countlines have been popular recently as they allow better portion control; and various companies have hence launched miniature ranges.
- Increased interest in artisanal and more “personal” chocolates. While some producers have focused on artisanal chocolates recently, others have tried to take a more personal approach than the traditional mass market one by restricting the availability of their product to certain dedicated outlets outside the typical super and hypermarket channels. Some producers have gone a step further by even allowing either customisable flavours and/or packaging.

In recent years the market for pastilles, gums, jellies and chews has grown and is expected to continue to do so going forwards due to several reasons. First, because the products flavours improve and new innovations are introduced quite often. Second, consumer in their 20s enjoyed some of these snacks as kids and are now going back to consuming them in adulthood. Interestingly, medicated confectionery is the biggest segment in sugar confectionery with strong growth forecast going forwards. This trend mirrors the growing consumer demand for healthy lifestyle choices. The growth will be mostly due to sells related to throat and nose relief, which is often needed due to many weather changes and strong air pollution in Singapore.

5.7.3 Offer

5.7.3.1 Domestic production

Despite its small size Singapore produces quite a lot of chocolate. Aalst Chocolate is a manufacturer of industrial chocolates as well as gourmet chocolates and other chocolate confectionaries. The factory opened in 2003 and is the first chocolate factory in Singapore completely owned and managed by locals. Already in 2014, the company produced 11 000 tonnes of chocolate and by the end of the year even expanded their production capacity up to 30 000 tonnes per year for the years to come. Today, they export about 98% of their products to more than 45 countries worldwide. Aalst Chocolate is the leading Chocolate manufacturer in Asia due to Singapore’s good connectivity to many markets.⁸⁴

Furthermore, there are several other big players who have production facilities in the country such as Barry Callebaut, a company based in Switzerland. This company is one of the biggest chocolate manufacturers and cocoa processors worldwide and its Singaporean factory has a yearly production

⁸⁴ Sweet deal for chocolate makers here <https://www.straitstimes.com/business/companies-markets/sweet-deal-for-chocolate-makers-here>; The Aalst promise: Delivering confidence and success to your creation <https://www.aalstchocolate.com/about>; A Day in the Life of a Chocolate Manufacturer

capacity is around 28 000 tonnes, which makes it one of Barry Callebaut's biggest factories worldwide. Another big producer is Mondelez, particularly known in Singapore for its Cadbury's products.⁸⁵

There are a lot of sugar confectionery stores in Singapore such as Candy Empire, Victoria 1938 and Sticky. However, most premises are not originally Singaporean and thus domestic sugar confectionery production is low.⁸⁶

5.7.3.2 Imports and exports

Singapore is a net exporter of chocolate confectionery. In 2018 it exported more than EUR 354m of chocolate confectionery, while it imported about chocolate confectionery with a value of EUR 213m (Figure 5-30). Even though Singaporean chocolate production relies on one main producer (section 5.7.3.1), this producer exports nearly all of its domestic manufactured products.

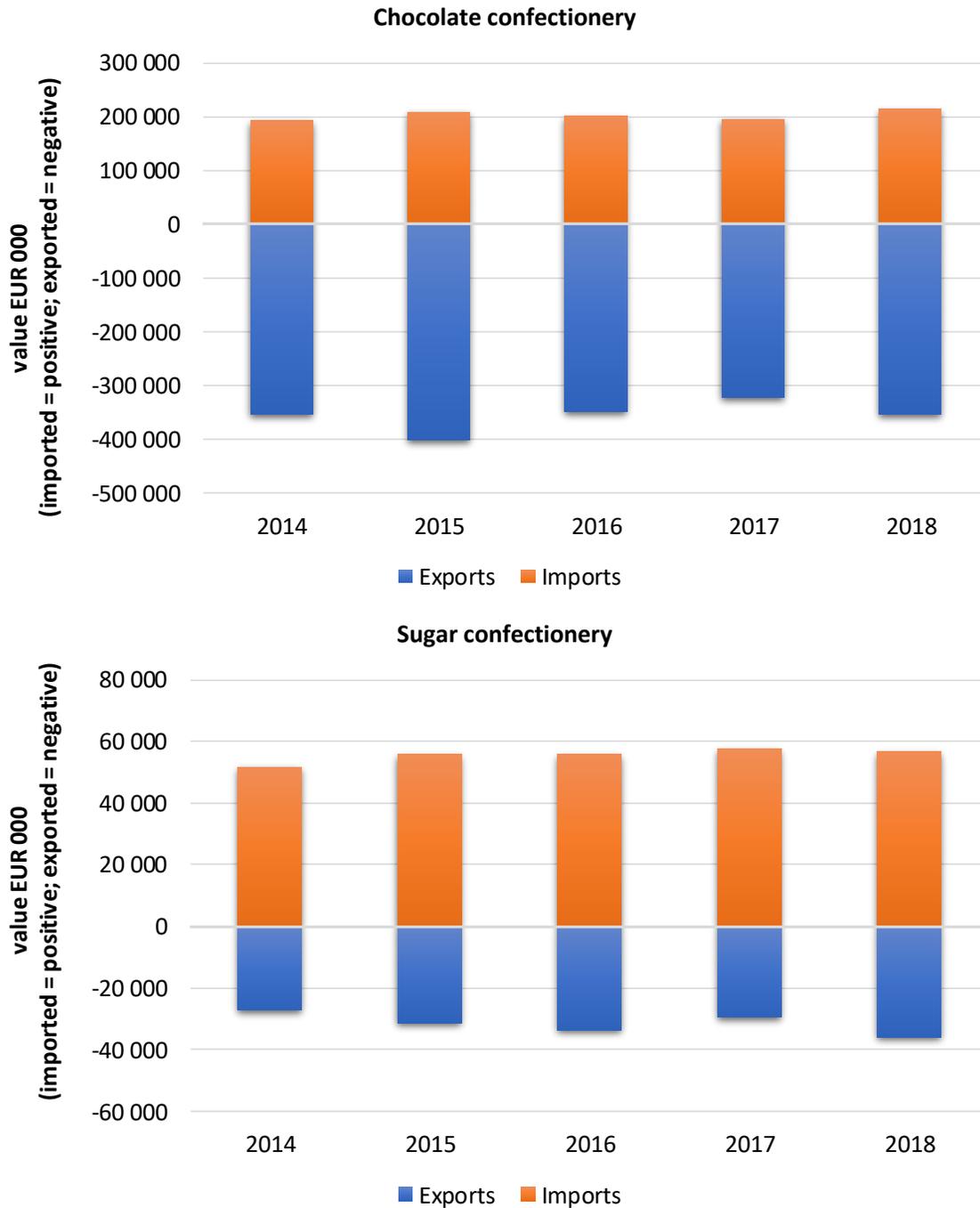
Singapore is a net importer in the sugar confectionery sector due to its low domestic production and because a lot of preferred sugar confectionery brands originate in other countries. In 2018 the city-state imported value of sugar confectionery was EUR 56m and exported value of about EUR 36m (Figure 5-30). Exports are at least partly due to Singapore's status as an entry door to many Asian markets in different countries due to its good location and big ports as explained in sections 2.1.1 and 4.4.1. Indeed, it is estimated that Singapore re-exports chocolates to over 30 different countries, and sugar confectionery to around 50 different countries. Roughly half of these re-exports are estimated to be to the ASEAN region.

⁸⁵Sweet deal for chocolate makers here

<https://www.straitstimes.com/business/companies-markets/sweet-deal-for-chocolate-makers-here>

⁸⁶ Candy shops in Singapore: Where to buy sweets, chocolates, lollipops, customised sugar treats and artisanal confectionaries <https://thehoneycombers.com/singapore/candy-shops-in-singapore-where-to-buy-sweets-chocolates-lollipops-customised-sugar-treats-and-artisanal-confectionaries/>

Figure 5-30: Trade balance (imports and exports) of confectionery in Singapore, 2014-18; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1806 and 1704.

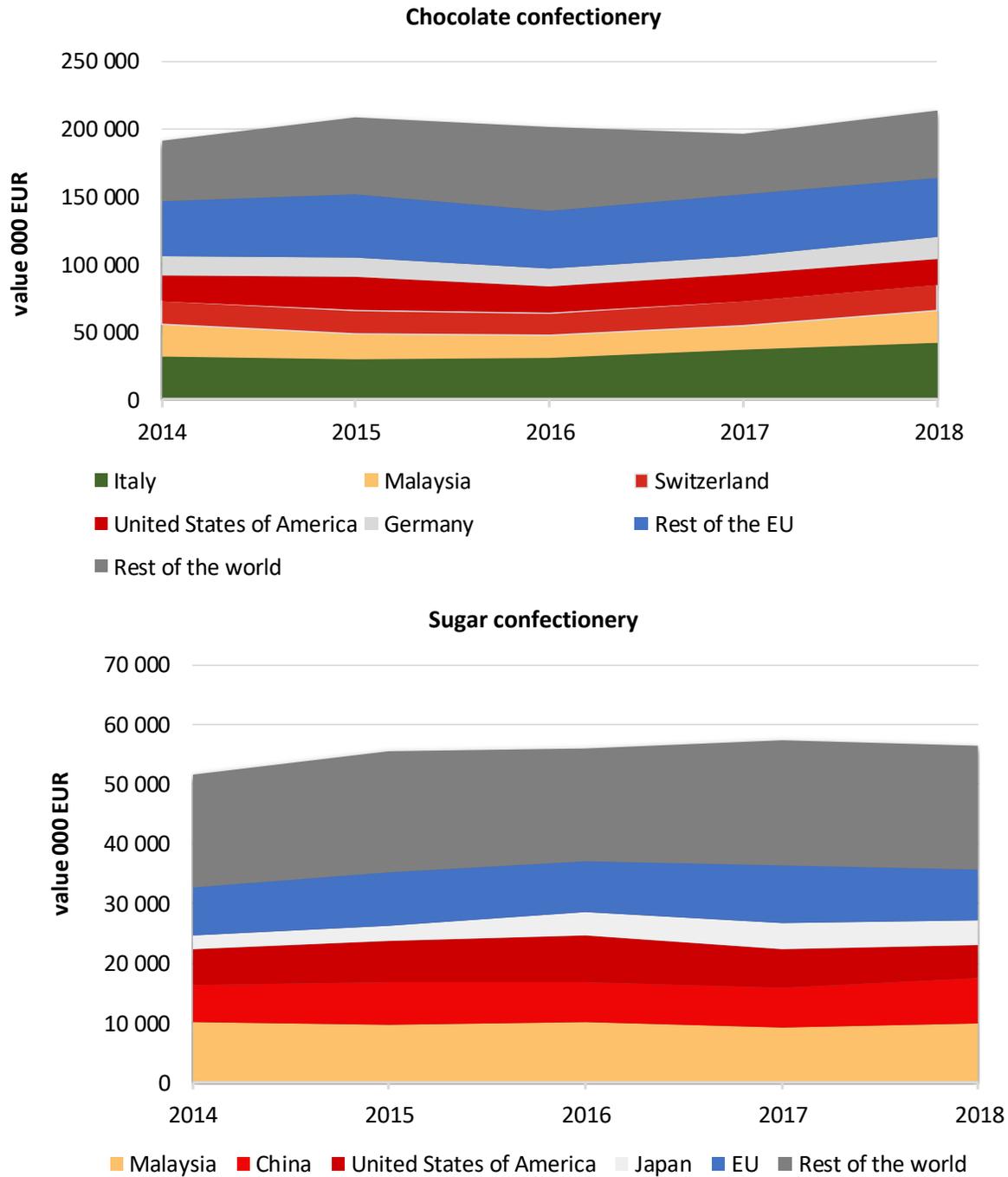
Origins of imports both chocolate and sugar confectionery are quite fragmented. For **chocolate confectionery** some European countries are part of the main exporters such as Italy (EUR 42m) and Germany (EUR 16m). European boxed assortments are particularly prominent in Singapore. The two main

non-EU exporters of chocolate to Singapore are Malaysia with an exported chocolate confectionery value of EUR 24m and the US which exported chocolate confectionery with a value of EUR 19m in 2018. A little bit less in value terms, but still important to keep an eye on is Australia who exported chocolate confectionery with a worth of EUR 9m to Singapore in 2018 as well. According to the exported volume Italy is number one, followed by Germany, Turkey, Australia and Russia.

When it comes to **sugar confectionery**, no EU country features among the four biggest exporters in value terms. Germany (EUR 2.5m) ranked 6th in 2018. The main players for the sugar confectionery category are Malaysia with EUR 10m, China with EUR 7.5m followed by the US with an exported value of EUR 5.5m in 2018 and Japan with EUR 4 m. The EU as a group, including Germany, accounts for around 1/6 of imports in value terms. When it comes to exported quantities EU countries are far behind. Most of the countries that export high volumes to Singapore are situated in the Asian region, plus the US and Turkey (Figure 5-31).

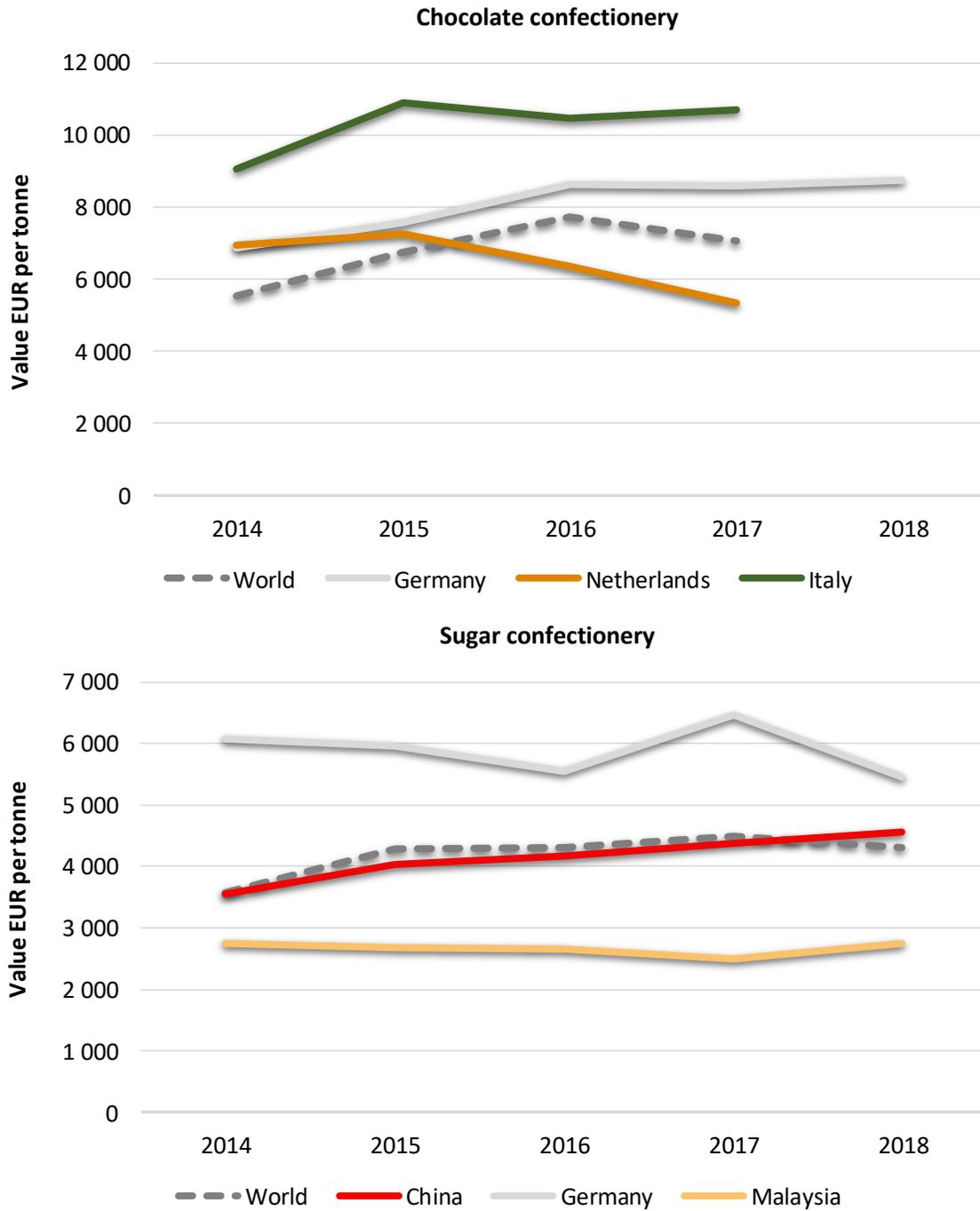
In terms of unit values, the major EU exporting countries generally exceed the world average unit value. While complete data for 2018 is not available for chocolate confectionery, 2017 shows the unit value of Italian (10 687 EUR/tonne) and German (8 587 EUR/tonne) imports into Singapore to be substantially ahead of the world average (7 055 EUR/tonne). The unit value of Dutch imports is below the average, however. The unit value of the EU's largest sugar confectionery exporter, Germany, is also substantially ahead of the world average (Figure 5-32).

Figure 5-31: Singaporean imports of confectionery by country, 2014-18; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1806 and 1704.

Figure 5-32: Per unit value of Singaporean imports of confectionery for selected countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1806 and 1704.

5.7.3.3 EU GI products

A few confectionery GIs were listed for protection under the EUSFTA, but only one, Lübecker Marzipan (Germany) has completed registration at the time of writing. It is recommended to consult section 9 for more details.

5.7.3.4 Main competitors

The main competitors vary for the two different sectors. In the chocolate confectionery sector several European countries export a lot. However, there is a high level of domestic production (even though most of this is exported), and the main foreign competitors are Malaysia, and the US. In terms of companies Ferrero SpA is ranked as number one on the market, being particularly strong in the boxed chocolate confectionery segment as it is present in nearly all off-trade retail channels. Despite the competitive environment, some companies have managed to enter or grow in recent years by targeting very specific niches (e.g. premium artisanal chocolates sold through dedicated outlets or specific channels rather than mass market supermarkets).

The market for sugar confectionery is fragmented in terms of origin, but other Asian countries such as Malaysia, China, Japan hold notable shares of imports; though but also the US. This market is highly competitive for EU exporters because of the wide range of different products from many different countries with a lot of different flavours and usually cheaper prices compared to general EU product prices. In company terms, international players such as Mars Foods Inc, Lofthouse of Fleetwood Ltd and Ricola Asia Pacific Pte Ltd are leaders in the sugar confectionery sector. However, Korean and Japanese brands are increasingly gaining popularity due to their exotic and innovative flavours.⁸⁷

5.7.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, chocolate and confectionery products in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European chocolate and confectionery products are not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=1806>

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=1704>

Customs procedures

⁸⁷ Euromonitor International: Packaged Food, 2020.

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for sugar and chocolate confectionery can be found on the websites indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=1806&countries=SG>

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=1704&countries=SG>

SPS measures

Sanitary and Phytosanitary measures concerning the import of sugar and chocolate confectionery into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=1806&countryid=SG#h15>

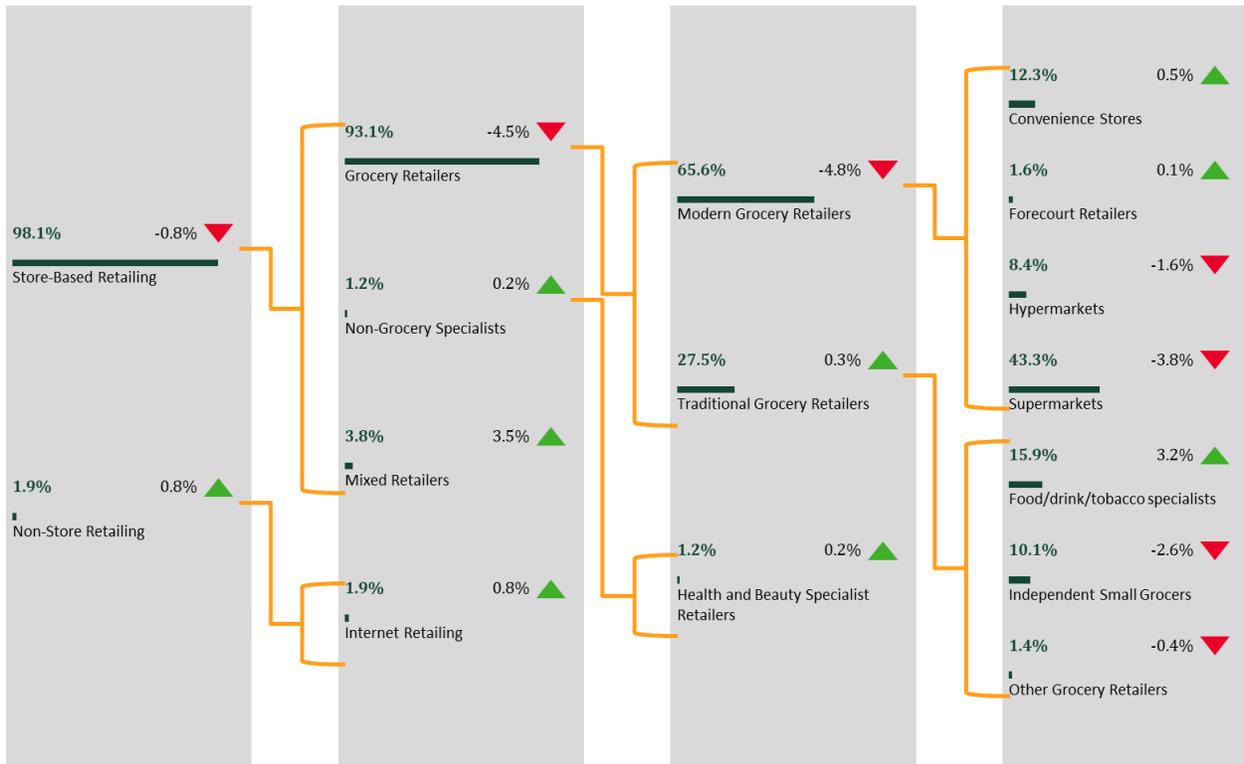
Labelling

Sugar and confectionery products must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. Chocolate requires date marking (as also set out in section 4.2.3).

5.7.5 Distribution

Modern and traditional retailers are the main distribution channels for chocolate confectionery and sugar confectionery in Singapore and reach most people. Although most confectionery is sold in supermarkets, high-quality chocolate confectionery products in particular are often sold through special chocolate boutiques such as Godiva or Hello Chocolate. Those food specialist stores account for 15% of the retail value as depicted in Figure 5-34.

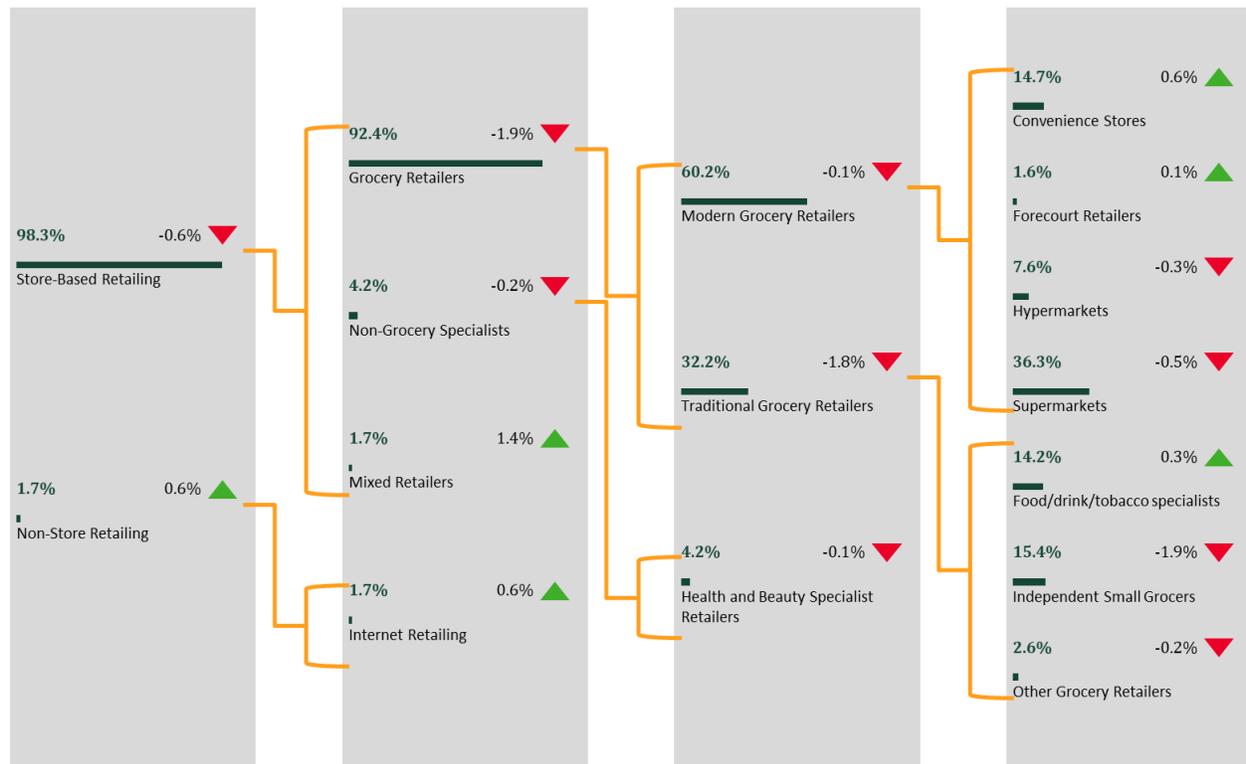
Figure 5-33: Distribution channel overview of chocolate confectionery in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

Specialist stores for sugar confectionery are common as well, accounting for 14% of sales. In addition, fewer products are sold through supermarkets (only 36% of sales by value) but therefore more are sold through convenience stores (15%) as seen in Figure 5-34. Online retail is not as popular as for most other products.

Figure 5-34: Distribution channel overview of sugar confectionery in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

5.7.6 Challenges for EU products

The markets for chocolate and sugar confectionery seem quite saturated. There are many small artisanal chocolate stores in Singapore already as well as strong domestic production, and competition in volumes and prices from other Asian countries especially in the sugar confectionery section is high. Besides those two main challenges it is not too complicated to export those goods.

Market Takeaway: Chocolate and confectionery

Consumption: chocolate confectionery among all age groups; sugar confectionery especially young adults and kids.

Competition: high competition in the sugar confectionery sector; EU is very competitive in chocolate confectionery sector.

Distribution: mostly off-trade in supermarkets or in special chocolate or confectionery boutiques.

Challenges: to compete with the high number of products coming from all over the world and the cheaper prices of some products.

Opportunities: new high-quality products as well as new and interesting taste innovations in products. European boxed assortment hold a strong position which could be further built on.

5.8 Beer

5.8.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ A high-income population that has yet to adapt to beer consumption provides a market with room to grow. ▪ The EUSFTA agreement allows for EU producers to export products to Singapore with fewer barriers. 	<ul style="list-style-type: none"> ▪ An increasingly health-conscious population which is increasingly unlikely to consume alcohol at levels witnessed in other nations. ▪ A government which has implemented laws to restrict the distribution and consumption of beer during certain hours and places.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Demand for imported beers has grown steadily in recent years, while that for the historically strong domestic beer has fallen as consumers look for something different. ▪ The annual beer festival continues to grow each year providing producers a window of opportunity to exhibit their products to Singaporeans. ▪ The market of non-alcoholic beer has exploded into life following recent product launches. 	<ul style="list-style-type: none"> ▪ New Producers in countries nearby trade more beer into Singapore than established EU producers. ▪ Successful domestic beer brands in Singapore and local craft beer production is growing.

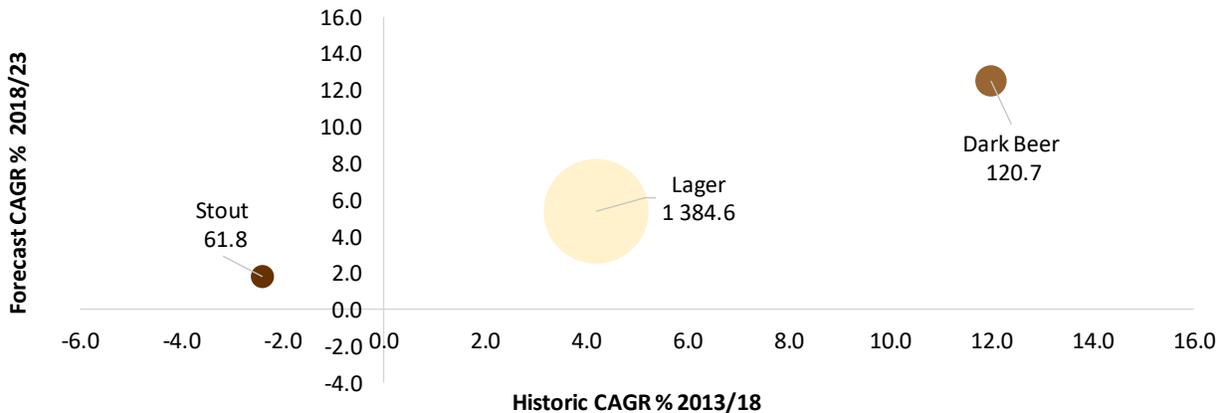
5.8.2 Consumption

5.8.3 Evolution of consumption

The consumption of beer in Singapore is one of the lowest in Asia. A combination of strict laws in Singapore implemented by a highly influential government such as the liquor control (supply and consumption) act of 2015 which limits trading and consumption hours of beer reduces consumption. Singapore also has a population of Muslims of around 15% who traditionally abstain from alcohol consumption. Despite these factors, the consumption of alcohol is growing in Singapore. The market for lager, the most popular beer, was worth almost EUR 1.4bn in 2018, having grown at 4.2% per year over the period 2013-18.

Dark beer had a market size of EUR 120m and stout's market stood at EUR 62m with dark beer having the advantage on strong growth over the period 2013-18 of 12% per year; and a healthy forecasted growth rate 12.5% for the period up until 2023. The market for stout on the other hand shrank in recent years and is forecast to only grow at 1.8% per year in the near future.

Figure 5-35 the beer market in Singapore (value, EUR million); 2013-2023



Source: Euromonitor International: Alcoholic Drinks, 2020.

5.8.3.1 Consumer profile and purchase criteria

Beer was first brought into Singapore by the British when under their rule in the 19th century. In the 1930s the commercial production of beer in Singapore began and it was during this time that the country's largest domestic producer of beer, Tiger beer was founded.

Consumers

While beer consumption in Singapore is amongst the lowest in Asia – partly due to the negative perceptions and high education levels - it is growing. Furthermore, despite this beer is the most common alcoholic beverage in Singapore and is easily available throughout the nation. Subsequently beer is consumed by a range of different consumers. Looking at a couple of consumer groups of specific interest:

- **Younger consumers** – predominantly males in the 25-40 age range - are increasingly interested in imported specialty beers such as Heineken which has the effect of lowering demand amongst younger consumers for domestic beers such as Tiger.⁸⁸
- Off-trade distribution channels are gradually appealing to many **consumers with less disposable incomes** as an alternative outlet from on-trade distributors who are far more expensive, in a country that is already one of the most expensive in the world.
- Consumers in the city centre (central region – south eastern segment) are more likely to consume beers imported from the EU. This part of the country comprises a large number of people with higher incomes and levels of exposure to foreign cultures.

Drivers and method of consumption

It is estimated that there are almost 700 bars in Singapore which offer consumer ample opportunities to purchase beer throughout the country and these provide a considerable driver. The consumption of beer

⁸⁸ Grasping opportunities in Singapore's beer industry <https://www.craftdrivenresearch.com/singapore-beer-industry/>

which has commonly been very low is growing spurred by trends such as after work drinking and networking events which are increasingly common. Most notably, beer is particularly popular at office/after work gatherings among the over mid-high income over 30s due to the low alcohol content. Many sport bars showing live events from the UK and Europe attract western expats due to it being the evening in Singapore, an ideal time for consumers to purchase beer.⁸⁹

Other notable drivers include: the combination of humid year round weather and spicy food, which makes beer popular as a meal accompaniment; and the music and outdoor festivals.

Despite the low overall low level of alcohol consumption in Singapore, the country hosts an annual beer festival that takes place named Beerfest Asia, the festival which began in 2008 attracts 30 000 consumers and features over 500 different beer and cider products for consumers to taste which drives up demand during this period. Singaporeans also drink to celebrate occasions; however consumption of alcohol remains one of the lowest in Asia and Singaporeans are increasingly consuming alcohol free alternatives.

Purchase criteria

Alcohol is expensive in Singapore, with Singapore being ranked as the world 7th most expensive nation to purchase a beer ahead of countries like Switzerland and Sweden. A feature of Singapore is that domestically produced beer is priced as a mid-range product. As is usual with many developed nations, wealthier consumers who usually pay attention to their health are more prone to purchasing a beer based on quality or alcohol content. Many imported beers, including brands like Stella Artois are priced as a premium product and appeal to wealthier consumers while domestically produced beer Tiger is a mid-range product and appeals to average consumers, although there is a growing trend of preference towards imported beers such as Skol and alcohol free beer such as Heineken 0.0.

Beer on retailers' shelves in Singapore

Typical retail prices for beer are:

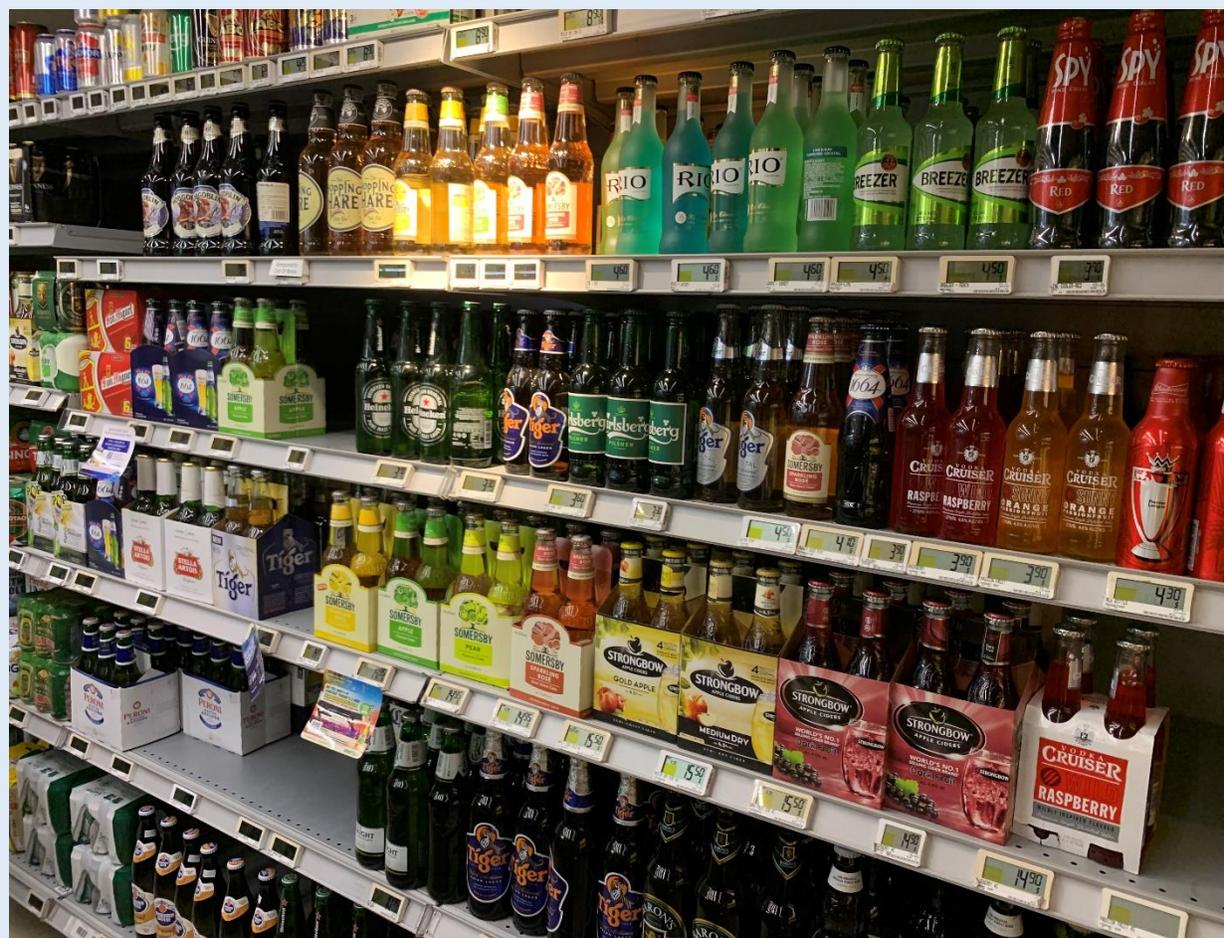
- **Economy:** below SGD 6/litre
- **Domestic mid-range:** between SGD 6 – 9/litre
- **Domestic premium / imported mid-range:** SGD 9 - 15/litre
- **Imported premium:** above SGD 15/litre

Multipacks or buy 5 get one free offers are fairly common promotional methods for beer as a whole. In addition to this, some producers do offer free beer mugs/glasses as a promotional method during peak seasons.

Metal cans have become increasingly popular for beer. Consumers are losing the perception that they are less premium than bottles; and appreciate the lighter weight and convenience of this packaging. Cans are particularly common for the e-commerce channel. The most common container size for

⁸⁹ Worldscitiescultureforum, number of bars <http://www.worldscitiescultureforum.com/data/number-of-bars>

imported beer is 330ml, though some other sizes can be found (most notably 500ml in the premium imported segment).



Pictures: © Agra CEAS / Euromonitor International, 2020.

5.8.3.2 Recent market trends

The consumption of alcohol is growing in Singapore. Craft ales, in particular, are growing in popularity in the country as sales of the product grew 9% in Singapore in 2018. Craft beer in Singapore is limited as licenses limit producers to brew no more than 1.8 million litres a year and is particularly enjoyed by young professionals. Connected to this trend, imported beers are also growing in popularity as Singaporeans look for alternatives to the traditional domestic beer. While the biggest beneficiary of this trend has been the economy imported segment, the mid-range and premium segments for imported beer have grown steadily in recent years while the corresponding domestic segments have either stayed still or contracted.

Non-alcoholic alternatives are also growing in demand as the population is highly educated leading to a health-conscious society. While products like Asahi Dry Zero, Erdinger or Krombacher alcohol free beers have been on the market for some years now, the 2018 launch of Heineken 0.0 alcoholic beer seems to have spurred interest in the category. While the segment is historically small, it is believed to have

rocketed in the last couple of years and it is now estimated to be over 1 million litres per year, with growth likely to continue; though it is likely to face continued competition from other non and low alcoholic drinks (including cocktails fulfilling these criteria).

5.8.4 Offer

5.8.4.1 Domestic production

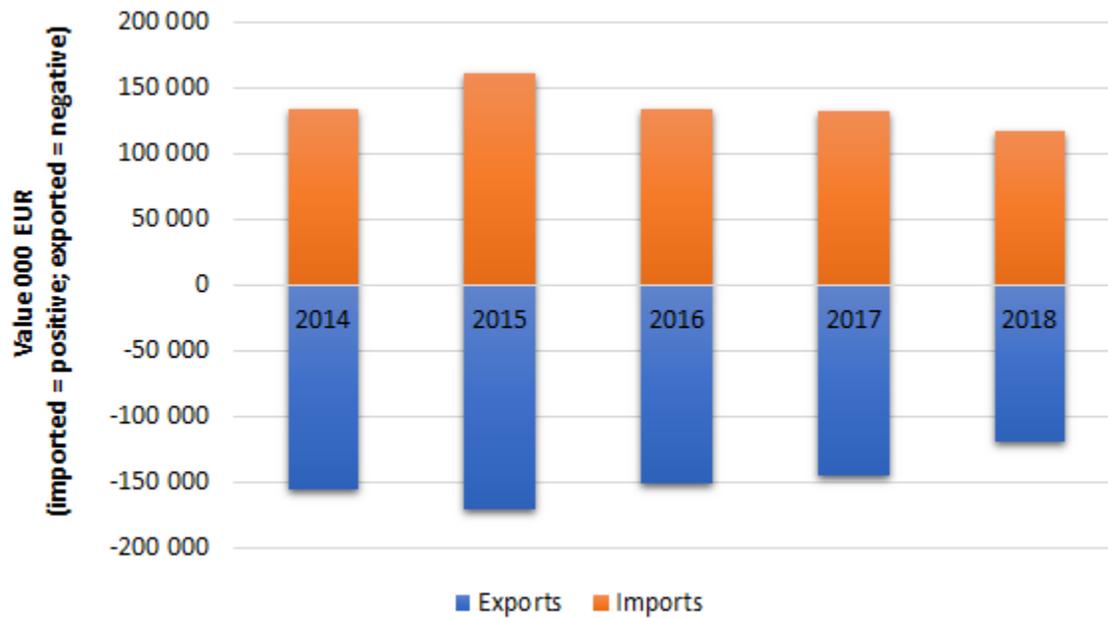
Beer production is one of the sectors that allows for domestic production at an industrial scale in Singapore. Singapore also imports roughly the same amount of beer that it exports which is rare for the country with an entirely urban population. The biggest brand to emerge from Singapore is Tiger beer which is sold across the world. Tiger, though originally conceived and still brewed in Singapore, is ultimately now owned by Dutch Company Heineken who is behind many beer producers in Asia including the Archipelago brewery another Singapore-based brewery.

5.8.4.2 Imports and exports

Due to a number of domestic producers and the popularity of Tiger beer internationally, beer exports of domestic Singapore production are unusually high among food and beverage categories. Tiger is one of Singapore's top ten valued products, though as noted above other beers are also produced locally. Overall, Singapore exports roughly the same value of beer as it imports, with both imports and exports worth just over EUR 100m in 2018; both having fallen from a peak of over EUR 150m in 2015 (Figure 5-36). Singapore imports most of its beer from Malaysia, Vietnam and the Netherlands (Figure 5-37).

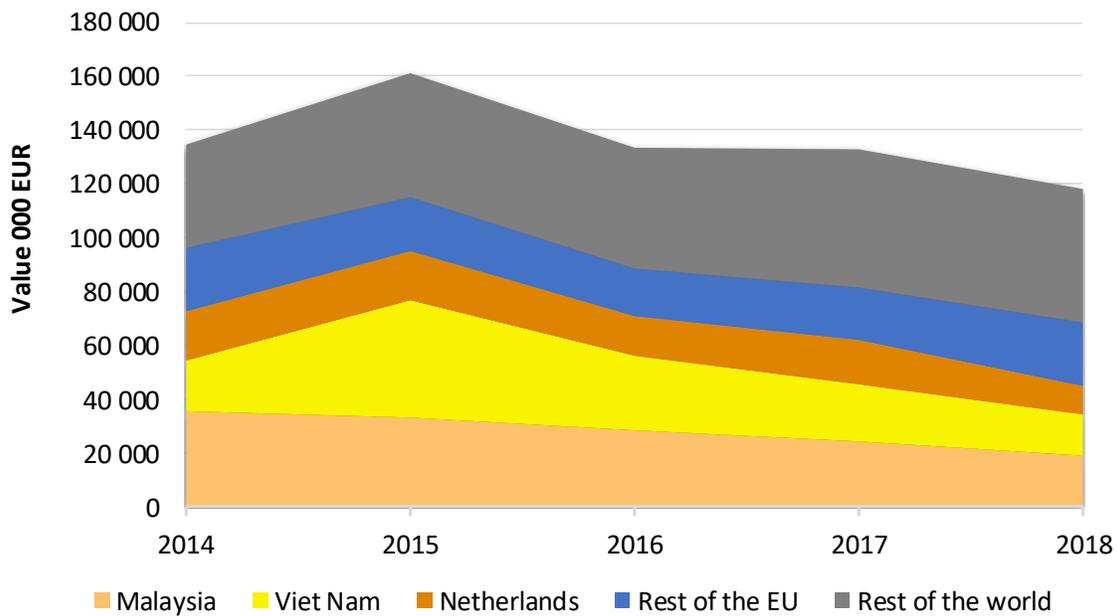
In terms of unit value, the unit values of Dutch and Belgium imports are consistently slightly ahead of the world average of +/- 1 000 EUR per tonne (Figure 5-38).

Figure 5-36: Trade balance (imports and exports) of beer in Singapore, 2014-18; EUR 000



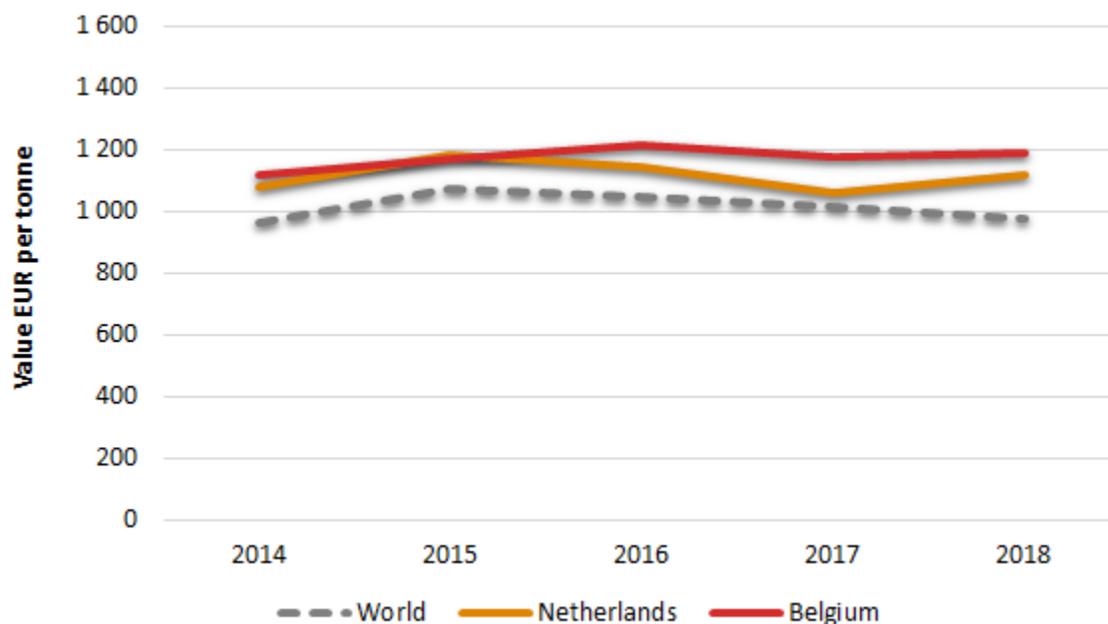
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2203.

Figure 5-37: Singaporean imports of beer by country, 2014-18; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2203.

Figure 5-38: Per unit value of Singaporean imports of beer for selected EU countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2203.

5.8.4.3 EU GI products

A few beer GIs were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing include:

- **Czech Republic:** České pivo, Českobudějovické pivo
- **Germany :** Münchener Bier

It is recommended to consult section 9 for a full list of those which were listed for protection but have not completed registration (so are currently not protected). Bayerisches Bier has registered but is currently being contested.

5.8.4.4 Main competitors

One of the main competitors to EU producers on the beer market in Singapore is domestic production (notably Tiger beer); a situation which is a rare agri-food products in the country given Singapore's general reliance on agri-food imports. The growth of beer production in neighbouring countries also presents a challenge to EU producers which leads to a situation where two major EU beer-exporting countries - Belgium and the Netherlands - come behind Malaysia and Vietnam in beer exports to Singapore. While interest in imported beers is increasing – a good sign for importers – some of the larger companies are using strong marketing campaigns and introducing ranges of products to try and capture the market – providing potentially stiff competition to smaller producers of imported beer.

5.8.5 Specific market entry requirements

As set out in section 4.2, beer in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European beer products are subject to not duties.

Market Access and Entry

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=2203>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for beer can be found on the websites indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=2203&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of beer into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=2203&countryid=SG#h15>

Labelling

Beer must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3.

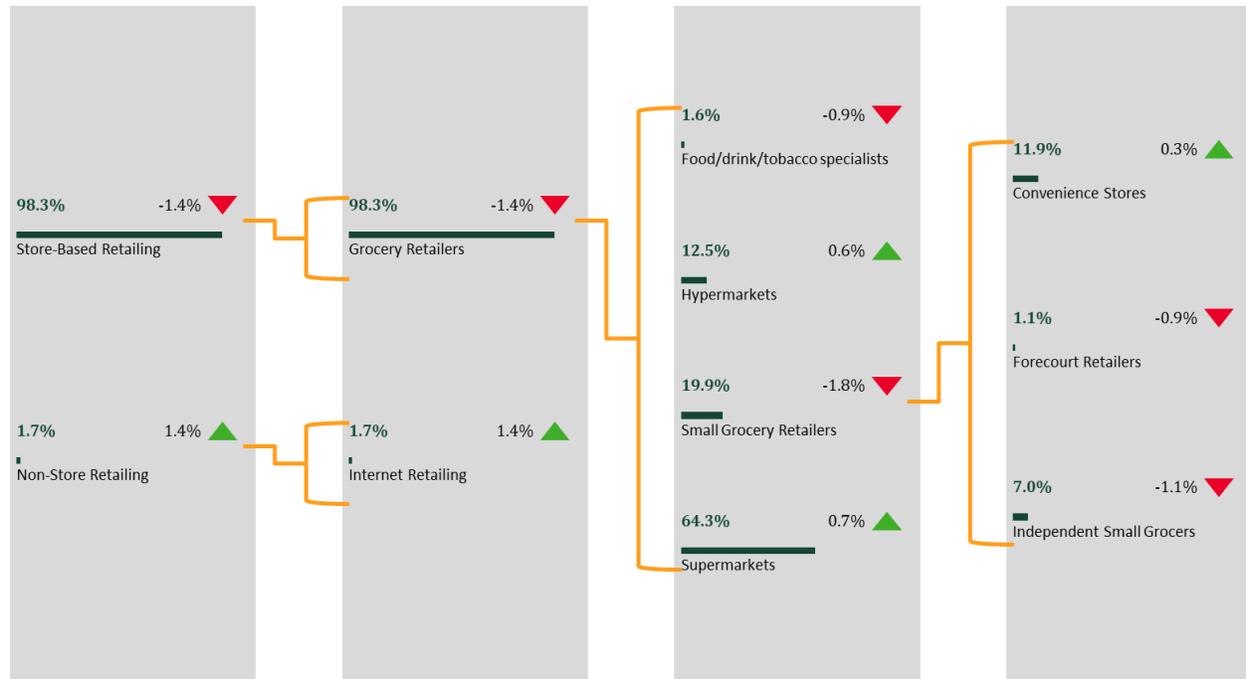
5.8.6 Distribution

Off trade account for just 35% of sales by volume in Singapore, on-trade sales from bars, clubs and restaurants accounting for 65% of the distribution of beer in Singapore.

As observed in Figure 5-39, grocery retailers are the main source of purchasing beer products off-trade. Supermarkets and hypermarkets, which lead grocery distribution with an over 75% share, are further growing

in beer distribution. Internet retailing is also growing in popularity but is still in its infancy only accounting for 1.4% of sales, a figure that is expected to grow going forwards.

Figure 5-39: Distribution channel overview of beer in Singapore (2018); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2020.

5.8.7 Challenges for EU products

The influential government of Singapore has also taken actions to limit alcohol consumption in the country which may in turn have a knock-on effect on the market for beer. EU Producers face challenges from domestic and geographically close nations to Singapore who has scaled up production of beer; notably Malaysia and Vietnam. Furthermore, domestic production of beer is also strong, with Tiger a well-known Singaporean brand both locally and internationally. Beer in Singapore is also expensive typically consumed on occasions as Singapore has one of the lowest consumption levels of beer in Asia. Nonetheless, demand for imported beer is rising, providing opportunities, though some bigger players are employing large marketing campaigns to try to take advantage of these opportunities.

Market Takeaway: Beer

Consumption: Singapore has one of the lowest consumptions per capita rates of beer in Asia, usually reserved for special occasions such as the annual Beerfest which leads to a rise in demand.

Competition: Domestic beer Tiger and beers produced nearby from Malaysia and Vietnam provide significant competition for EU producers. Increasing competition between importers and from local craft breweries.

Distribution: Mainly on-trade (65% of volume). Off-trade is sold through hypermarkets and supermarkets and prohibited from sale between the hours of 22.00pm and 07.00 am.

Challenges: A rising health-conscious society combined with an influential government who actively advocate against beer consumption.

Opportunities: A consumer base with a high income allows for market growth provided that consumers adapt to beer consumption habits that are common in other nations. Imported beer segment growing at a rate well ahead of the domestic one.

5.9 Processed meat

5.9.1 SWOT analysis

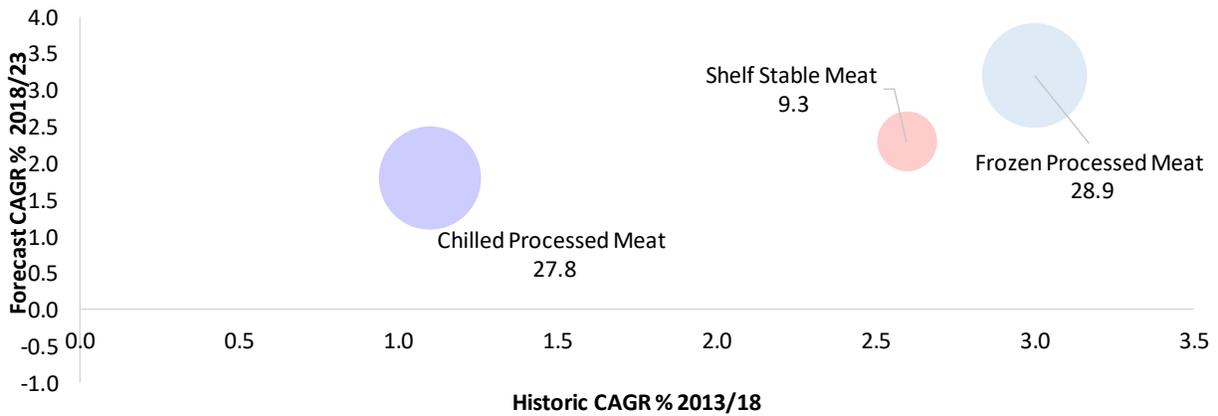
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Singapore's high standards for processed meat imports, which EU products are generally well positioned to fulfil. ▪ Many western expats, who prefer European style processed meat. 	<ul style="list-style-type: none"> ▪ Market for shelf stable meat is relatively small. ▪ (Frozen) meat substitutes are gaining in popularity.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ The market for frozen processed meat is forecast to grow in particular. ▪ High-quality processed meat is preferred, and this may favour EU high-quality processed meat products. 	<ul style="list-style-type: none"> ▪ Asian swine flu a threat for shelf stable meat ▪ Competition with Asian neighbours, which are geographically and culturally closer and in addition have cheaper products.

5.9.2 Consumption

5.9.2.1 Evolution of consumption

In 2018 the processed meat sector in Singapore had a value of EUR 66 million. The products within this sector are distinguished into 3 different sections, namely frozen processed meat, chilled processed meat and shelf stable meat. The markets for frozen and chilled processed meat are the biggest and combined accounted for over 85% of the markets value in 2018. Between 2013 and 2018 the market for frozen processed meat had the biggest CAGR with 3%. This trend is forecast to accelerate slightly with a growth rate of 3.2% between 2018 and 2023. Moreover, the market for chilled processed meat is forecast to increase by 1.1% per year between 2018 and 2023 (compared to 1.8% historically), while the CAGR for the smallest section shelf stable meat is forecast to be 2.3% over the same period compared to 2.6% historically (Figure 5-40).

Figure 5-40: Evolution and forecast of the processed meat market in Singapore, 2013-2023; retail value EUR million



Source: Euromonitor International: Packaged Food, 2020.

5.9.2.2 Consumer profile and purchase criteria

Consumers

Consumers of processed meat can be found in all age groups and income groups. Due to the diverse Singaporean culture, people from different backgrounds prefer different products. Some religious people do not consume meat products at all (see section 5.1.2.2). However, Singaporean consumers are always curious about new flavours and health-conscious products with good quality, that consumers in general are from all different kind of backgrounds.

Drivers and method of consumption

Most consumers of European charcuterie products probably are part of the western expat community because most Asian cultures prefer different local tastes, that are usually not found in original European processed meat products.⁹⁰ In addition, some cultures, especially due to religious reasons do not consume processed meat at all. In particular, western expats mainly purchase products they associate with their cultural backgrounds because they feel familiar to them.

Purchase criteria

Processed meat is often consumed as a side dish or a snack and thus is not eaten on a regular basis. Consumers like to have a variety of those products, which should suit their taste preferences. This openness opens the market for all kind of processed meat products.⁹¹

⁹⁰Is Singapore still attractive for Western expats? <https://sbr.com.sg/economy/commentary/singapore-still-attractive-western-expats>

⁹¹ Euromonitor International: Packaged Food, 2020.

5.9.2.3 Recent market trends

Due to African swine fever outbreaks, consumers have started to become careful, particularly in regard to shelf stable red meat. The Singaporean food agency forbid imports of meat from affected regions. This ban and the media presence of this problem led to a stagnation of the growth shelf stable meat. Consumers tend to avoid it and exchange it with other products since problems first occurred. In coming years, this negative trend is forecast to continue, also due to negative impacts of other meat borne viruses such as H5N1 and Nipah virus.

Another recent trend is the growing popularity of meat substitutes in Singapore. Since products became available in supermarkets and hypermarkets their market value grew. However, it is forecast to not grow at the current fast rate forever due to several reasons. First, because those products are still novel and consumers are curious about them and second because meat substitutes are usually very expensive.

5.9.3 Offer

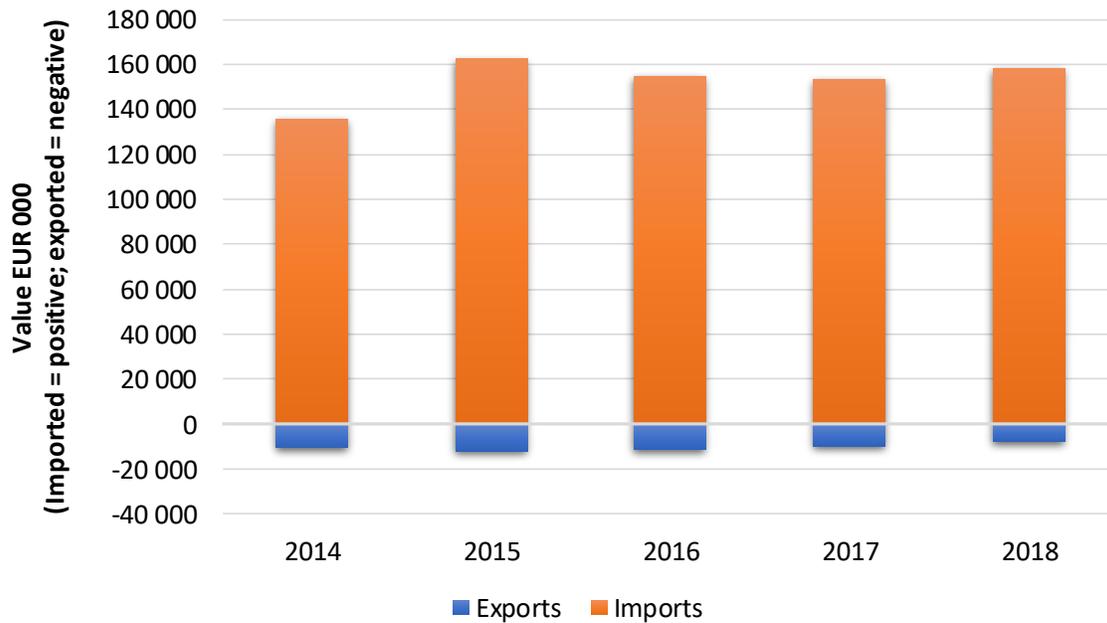
5.9.3.1 Domestic production

Singapore is a small-city state and is in general not producing a lot of food or beverage products on its own. This is the case processed meat as well. In general the demand for processed meat is not very big as shown in 5.9.3.2 (following section), which might be one reason why there is no notable domestic production in Singapore.

5.9.3.2 Imports and exports

The processed meat market in Singapore is comparatively small. In 2018 the country imported products with a value of EUR 158m and exported goods with a value of EUR 8m. Thus, Singapore is a net-importer of processed meat. Overall, the import value has been higher than in previous years, however, in recent years numbers have been fluctuating.

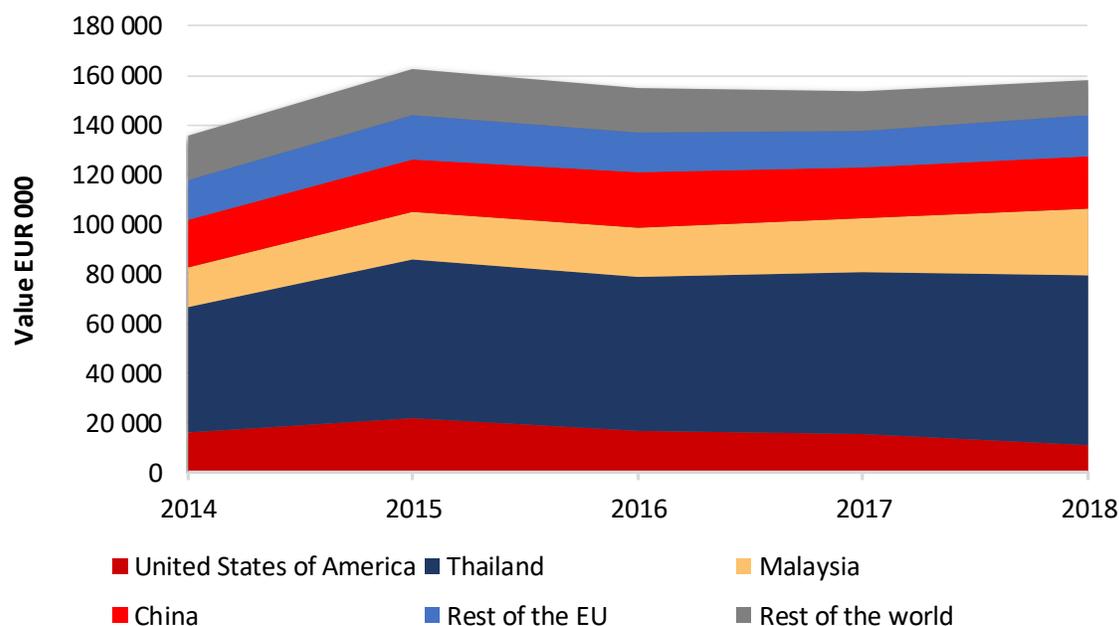
Figure 5-41: Trade balance (imports and exports) of processed meat in Singapore, 2014-18; in euros



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN codes 0210, 1601, 1602.

Most imports of processed meat come from other Asian countries. The top three being Thailand, Malaysia and China. All three of them combined exported goods with a value of more than EUR 113m to Singapore, which accounts for more than 70% of the overall market value. Malaysia is the number one and its exports nearly reached EUR 68m in 2018. Yet, EU countries still export processed meat as well.

Figure 5-42: Singaporean imports of processed meat by country, 2014-18; in euros



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 0210, 1601, 1602.

5.9.3.3 EU GI products

Several processed meat GIs were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing include:

- **Germany:** Nürnberger Bratwürste / Nürnberger Rostbratwürste
- **Spain:** Jabugo
- **France:** Canards à foie gras du Sud-Ouest (Chalosse, Gascogne, Gers, Landes, Périgord, Quercy), Jambon de Bayonne
- **Italy:** Cotechino Modena, Zampone Modena, Bresaola della Valtellina, Mortadella Bologna, Prosciutto di Parma, Prosciutto di San. Daniele, Prosciutto Toscano
- **Hungary:** Szegedi téliszalámi / Szegedi szalámi

This list is not comprehensive, it is recommended to check section 9 for a full list of GIs registered under the FTA and those which were listed for protection but have not completed registration (so are currently not protected).

5.9.3.4 Main competitors

Main competitors are mainly from the Asian region such as Thailand, Malaysia and China. Moreover, the US is also exporting a lot of processed meat to Singapore. However, the city-state does not have its own processed meat production and therefore is not a competitor.

5.9.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, processed meat in Singapore falls into the category of meat products; and as such must comply with the Sale of food act and the Wholesome meat and fish act.

Furthermore, countries must be approved before meat products can be exported. A list of accredited countries by product at the time of writing can be found at the following website:

<https://www.sfa.gov.sg/docs/default-source/tools-and-resources/resources-for-businesses/approved-countries.pdf>

Please note that the situation is constantly changing, and hence either the most recent version should be checked, or the ministry of agriculture in your Member State consulted.

Historically, overseas establishments also need to be accredited. Accreditation from the SFA can be applied for through the competent authority of the country in question. Two different forms exist: one for slaughterhouses / cutting plants (https://www.sfa.gov.sg/docs/default-source/e-service/food/application-form_slaughterhouse.docx?sfvrsn=161b1694_26) and one for canning / processing plants (https://www.sfa.gov.sg/docs/default-source/e-service/food/application-form_processingcanning.docx?sfvrsn=111b1694_21). However, under the EU-Singapore FTA, prelisting applies, meaning that the approved competent authority of the country for each member state may provide the list of establishments which comply with the requirements of the Singaporean authorities; and the Singaporean authorities have a set time frame of 40 days to approve these establishments without prior inspection, or to request extra information; any rejection will have to be justified).

A licence (valid 1 year) and import permit (per shipment) are required for the import of meat; and both of these incur fees. At the time of writing, these fees are SGD 84 per year for the licence and SGD 4.60 per 100kg for the permit.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by putting in the corresponding code:

e.g. <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=1601>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for different processed meat products can be found on the websites indicated in the box below; most notably, a veterinary health certificate is required.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=1601&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of processed meat into Singapore are in line with international standards. However, there are a couple of challenges that EU exporters should be aware of:

- **Regionalisation:** in principle, regionalisation is accepted by Singapore. However, ultimately applications for regionalisation have to be made on an outbreak by outbreak basis so treatment and/or acceptance may vary between cases; and the method of regionalisation employed may differ from that used by the EU (e.g. a larger area may be regionalised). There are commitments under the EU Singapore FTA to further discuss the issue of regionalisation with an aim to further simplify it.
- **Born/raised/slaughtered:** Singapore effectively only accepts processed meat from animals which are born, raised and slaughtered in the same country. Discussions on this issue remain ongoing.

Furthermore, as outlined above a veterinary health certificate is required.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=1601&countryid=SG#h16>

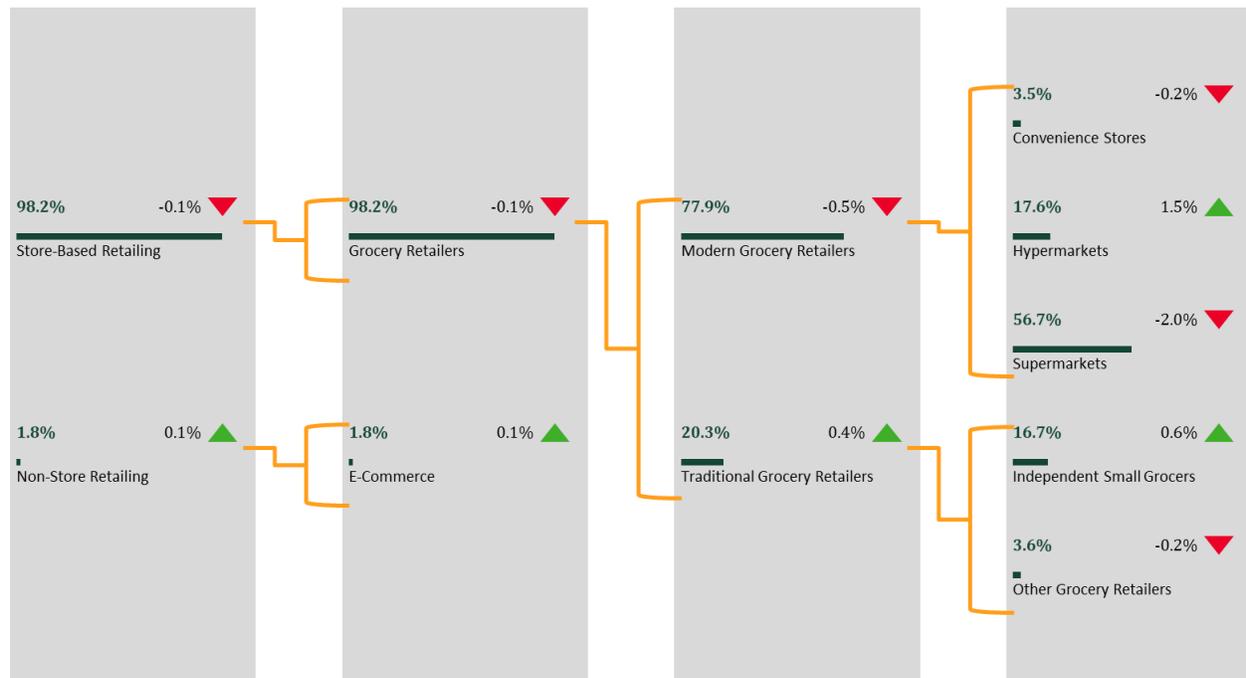
Labelling

Processed meat products must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. The Food Regulations also contain criteria that certain processed meat products must fulfil (e.g. **Meat paste or pate, which includes meat spread, shall be a smooth readily spreadable product with a meat content of not less than 70% in the form of finely divided meat, and not less than 60% of the meat content shall be lean meat**). Processed meat products which need to be stored at a chilling temperature to maintain or prolong their durable life require date marking (as also set out in section 4.2.3).

5.9.5 Distribution

Even though the online retail sector is growing, nearly all processed meat and seafood products are sold in store-based grocery retailers (over 98%). Supermarkets had the biggest retail share in 2018 and made up 3/5th of all sales. However, their importance has been slightly decreasing. This trend is suspected to continue, which means that other retail sectors will grow in importance. Notably hypermarket as well as independent small grocer retail shares have risen. Hypermarkets probably because of their immense amount of offers to choose from and independent small grocers because their products are often perceived to be have higher quality of product than those in more commercial shops (Figure 5-43).

Figure 5-43: Distribution channel overview of processed meat and seafood in Singapore (2018); retail value



Source: Euromonitor International: Packaged foods, 2020.

5.9.6 Challenges for EU products

A notable challenge is that the largest share of the market is dominated by Asian exporters such as their neighbours Malaysia as well as Thailand and China. Moreover, the US is one of the bigger players as well. Many EU countries are exporting their products, but the market seem to be already saturated by potentially cheaper products from those countries listed before, and some of the EU's charcuterie products have a fairly niche market. As a result, it will be challenging for EU exporters to reach the mass market with their products. Moreover the market for shelf stable meat is low compared to the other ones, which shows there is less demand for those products and the export of shelf stable meat became more complicated due to outbreaks of the Asian swine flu and other historically present diseases in meat products. In addition to this problem the markets for non-animal based imitation meat and especially tofu products is growing - even in many restaurants and cafes it becomes increasingly common to serve dishes with meat alternatives.

Market Takeaway: Processed meat

Consumption: mainly Western expats, food enthusiasts and high-income consumers.

Competition: main competitors are neighbouring Asian countries, competing against cheaper products.

Distribution: through supermarkets mainly, but also increasingly through small grocers and specialized shops.

Challenges: EU products are a niche market, small market for shelf stable meat (partly caused by swine flu outbreak), vegan/vegetarian meat alternatives and tofu.

Opportunities: High quality charcuterie products, frozen products.

5.10 Ice cream

5.10.1 SWOT analysis

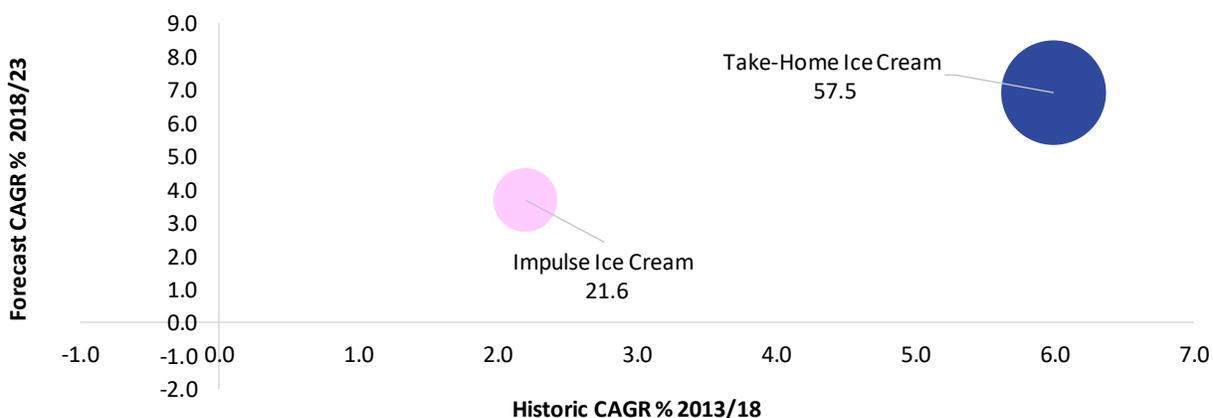
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Singapore's hot weather allows for rising ice cream consumption. ▪ A sizable amount of the Premium Ice cream is from the EU. 	<ul style="list-style-type: none"> ▪ Rising health consciousness put ice cream consumption in danger. ▪ Government have banned the advertisement of goods with a high sugar content.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Niche markets such as low-fat and vegan ice cream allow for produces the opportunity to enter niche markets. ▪ People of all socioeconomic levels have access to this product. 	<ul style="list-style-type: none"> ▪ The government has advocated against consumption in an effort to lower rising health care costs in the country. ▪ Rising local production which incorporate local ingredients to create unique flavours.

5.10.2 Consumption

5.10.2.1 Evolution of consumption

Singapore observed a growth in take-home ice cream; total sales of this type of ice cream recorded a growth of 6.0% per year between 2013-2018. With a retail value of almost EUR 58m in Singapore in 2018, take-home ice cream is the preferred choice from consumers. Impulse ice cream purchases accounted for a retail value of EUR 22m in 2018 (Figure 5-44). Other products such as frozen yogurt have not witnessed much success in Singapore, however it can be expected that take-home ice cream and impulse ice cream will continue to grow in this market.

Figure 5-44: Evolution and forecast of the ice cream market in Singapore, 2013-2023; retail value EUR million



Source: Euromonitor International: Packaged Food, 2020.

5.10.2.2 Consumer profile and purchase criteria

Consumers

Consumers of ice cream products traverse ethnic and monetary lines in Singapore, with families and millennials notable consumer groups. That said, the diversity of Singaporeans, leads to a variety of consumer preferences and flavours (see below). Singaporeans are increasingly health-conscious leading to a subset of the consumer base who increasingly purchase more expensive low fat and organic alternatives. The presence of a large ex-pat community also drives growth as ex-pats, particularly from the west, are accustomed to regular ice cream consumption.

Drivers and method of consumption

Hot weather tends to drive up demand for ice cream, and this is indeed the case in Singapore, which has an average temperature above 25 degrees Celsius. Ice cream is increasingly being sold across food service outlets instead of exclusively thorough ice cream outlets, and this is acting as a notable driver for ice cream sales, reflecting the high level of consumption of ice cream outside the home. The growth in food service outlets selling ice cream is posing competition for packaged ice cream products.

Purchase criteria

Flavours are an important criteria. As noted above, a variety of flavours are present on the Singaporean market. While chocolate followed by strawberry are the most popular flavours overall, coffee, durian and corn feature as the 4th, 5th and 6th most popular flavours respectively. Nonetheless, there is strong interest in new flavours and innovations; and producers, both in the home consumption and food service channels have addressed this interest in recent years in order to attract consumers. Indeed, constant innovation, both in terms of flavour and packaging, is used by the larger take-home ice cream producers in order to maintain consumer interest.

Ice cream is generally seen as an indulgence product. While consumers in Singapore are generally cost-conscious due to the country being one of the world's most expensive countries, producers are increasingly targeting the mid-range and premium segments in order to meet what they have identified as consumer preferences. Notably, affluent consumers are likely to spend more money of niche ice cream products such as organic or vegan.⁹²

5.10.2.3 Recent market trends

Recent trends in Singapore show us that Ice cream consumption is increasing in Singapore. The combination of ever warmer weather and the diversification of ice cream across food service outlets have increased product availability across Singapore. Packaged ice cream is increasingly under threat from the growth in foodservice sales of ice cream; and indeed some packaged ice cream producers have entered the food service segment in order to address this threat.

As noted above, there has been considerable innovation in the ice cream segment – both in terms of flavours and concepts specifically in the food service channel – and this innovation is expected to continue

⁹² Euromonitor International: Packaged Food, 2020.

going forwards. However, it is also expected that there will be an increased focus on innovation in terms of the healthiness of the product, as consumers show increased interest in health concerns. Furthermore, the presence of many international brands in Singapore has led to increase competition with producers having to innovate and offer new products such as vegan alternatives to compete in the country.

5.10.3 Offer

5.10.3.1 Domestic production

Local packaged ice remains limited, with F&N foods the only notably player. This is largely due to the limited supply of ingredients in Singapore. There is however a growing interest in food start-ups and domestic producers are likely to gain a foothold in the take home ice cream market despite government efforts to curtail sugar consumption and curb the rise of obesity-related illnesses. Furthermore, local artisanal production is very much present in the food service channel, with many ice cream parlours creating their own ice cream, often with unique local flavours.⁹³

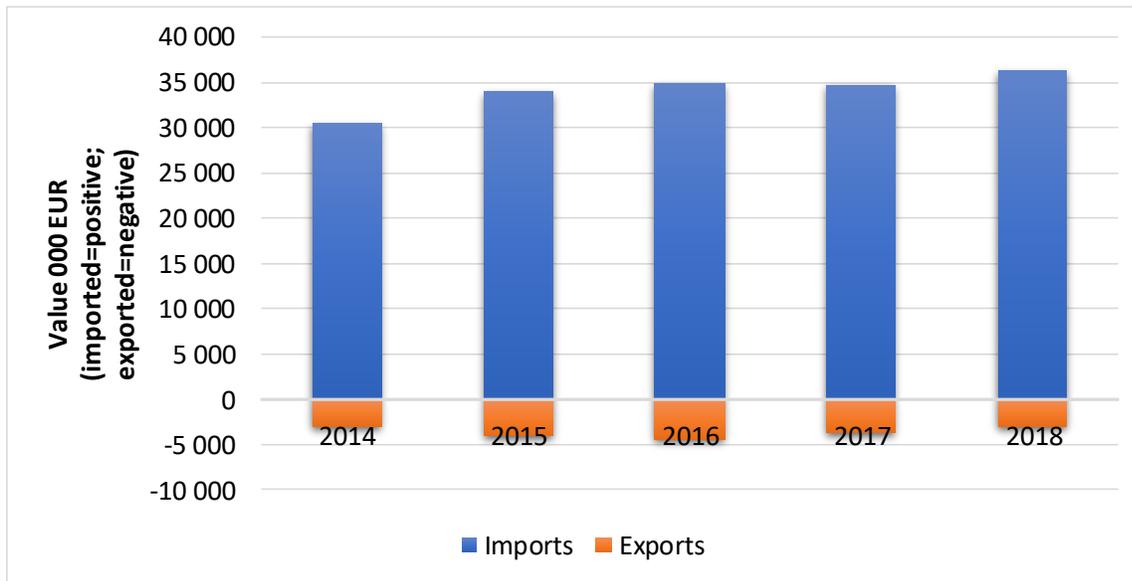
5.10.3.2 Imports and exports

Singaporean imports of ice are moderate at just over EUR 35m in 2018; but it is still several times its exports. Both imports and exports have been fairly steady, with imports showing a slightly upward trend over the period 2014-18 (Figure 5-45). A notable amount of imported ice cream comes from Malaysia and Thailand, which combined account for around 40% of imports by value (Figure 5-46). However, there are imports of more exclusive and premium ice cream from France and the USA. Singapore also exports very little ice cream and acts mostly as a transit hub for producers. Australia, Malaysia, and the UK are the biggest markets for ice cream products that have be transited through Singapore.

⁹³

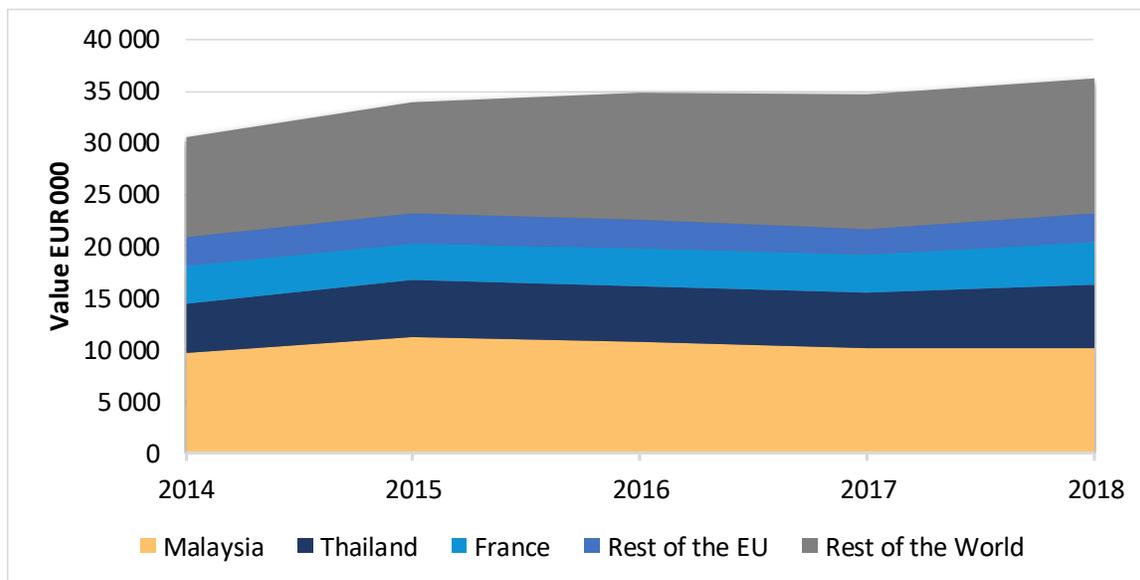
<https://www.timeout.com/singapore/restaurants/the-best-ice-cream-shops-in-singapore>;
<https://sgmagazine.com/restaurants/news/9-best-ice-cream-places-singapore>;
<https://thehoneycombers.com/singapore/best-ice-cream-in-singapore-cold-dessert-gelato-yogurt-soft-serve/>

Figure 5-45: Trade balance (imports and exports) of ice cream in Singapore, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2105.

Figure 5-46: Singaporean imports of ice cream by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2105.

5.10.3.3 EU GI products

There are no registered Geographic indicators under the EUSFTA. Please refer to section 9 for a full list of GIs registered under the EUSFTA agreement.

5.10.3.4 Main competitors

The main competitors for ice cream products in Singapore is the slowly growing domestic production in Singapore, particularly in the food service channel; and the sizable share of imports accounted for by Malaysian and Thai ice creams in the Singaporean market. The USA and Japan also pose competition for EU ice cream producers of a more premium quality.

5.10.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, ice cream in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European ice cream products imported into Singapore are not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European

Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=2105>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for ice cream can be found on the website indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=2105&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of ice cream into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFpubli.htm?doc=overview&hscod=2105&countryid=SG#h15>

Labelling

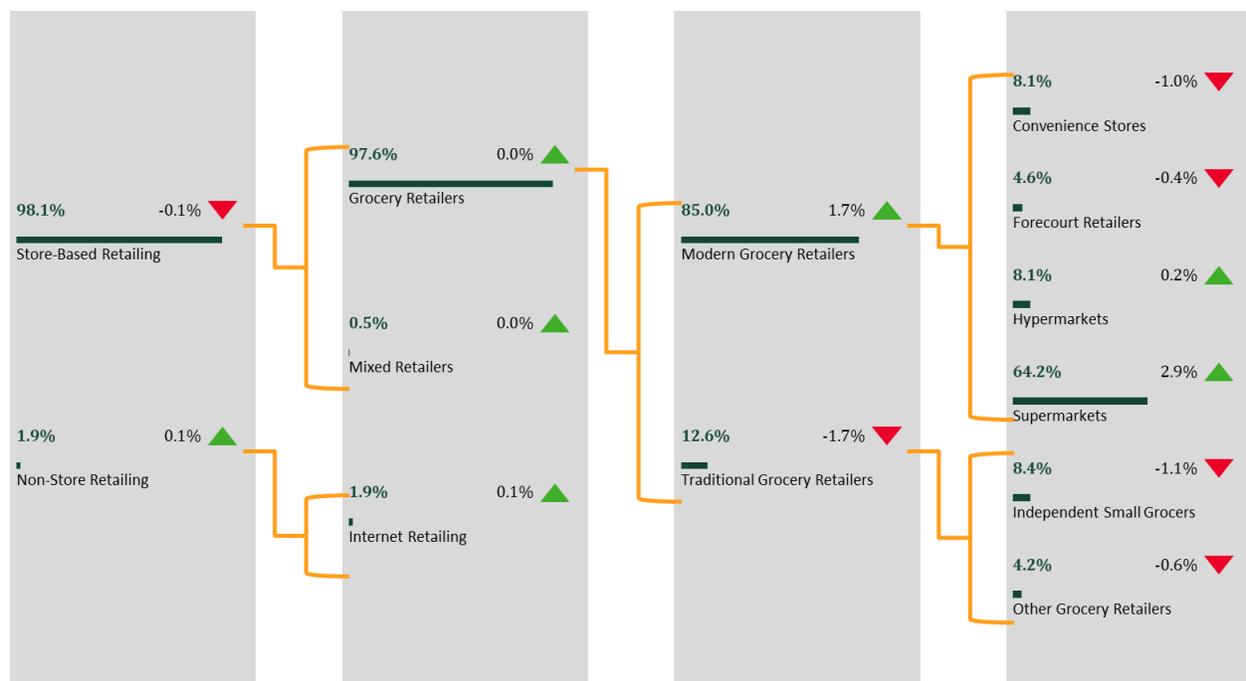
Ice cream must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. The Food Regulations also contain certain criteria that ice cream products must fulfil to be described as such (e.g. *Dairy ice-cream* or *full cream-ice* or *dairy cream-ice shall be the frozen*

preparation of milk or cream or milk products with or without the addition of sugar. It shall contain not less than 10% (w/w) milk fat and not less than 7.5% (w/w) non-fat milk solids). As ice cream may be considered a product which needs to be stored at a chilling temperature to maintain or prolong its durable life it should be date marked (as also set out in section 4.2.3).

5.10.5 Distribution

Food service is important for the distribution of ice cream in Singapore. Indeed, it is estimated to account for around $\frac{3}{4}$ of ice cream sales by volume, with retail sales accounting for the remaining quarter. Among retail channels, modern grocery retailers dominate, holding 85% of the retail market by value; and their importance has only increased in recent years (Figure 5-47).

Figure 5-47: Distribution channel overview of ice cream in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

5.10.6 Challenges for EU products

The importance of the foodservice channel, which often relies on local artisanal production in some form and is in close contact to its consumer, is a notable challenge for exporters to Singapore. All producers face challenges from the government and its recent advocacy to reduce sugar and fatty food intake as a program to lower rising health care costs in the country. EU producers are also at risk from producers in Malaysia and Thailand who have a large share of imports into the ice cream market in Singapore.

Market Takeaway: Ice cream

Consumption: Consumed as an indulgent product, hot weather a notable driver.

Competition: Malaysian and Thai producers provide competition for EU Ice cream producers as does domestic artisanal production.

Distribution: food service accounts for around $\frac{3}{4}$ of ice cream distribution. Modern retailers dominate among retail channels.

Challenges: The government has advocated against consumption as a part of a health campaign to curb rising healthcare costs in the country.

Opportunities: Ice cream consumption continues to grow, and many innovations allow for niche markets to appear.

5.11 Prepared baby food

5.11.1 SWOT analysis

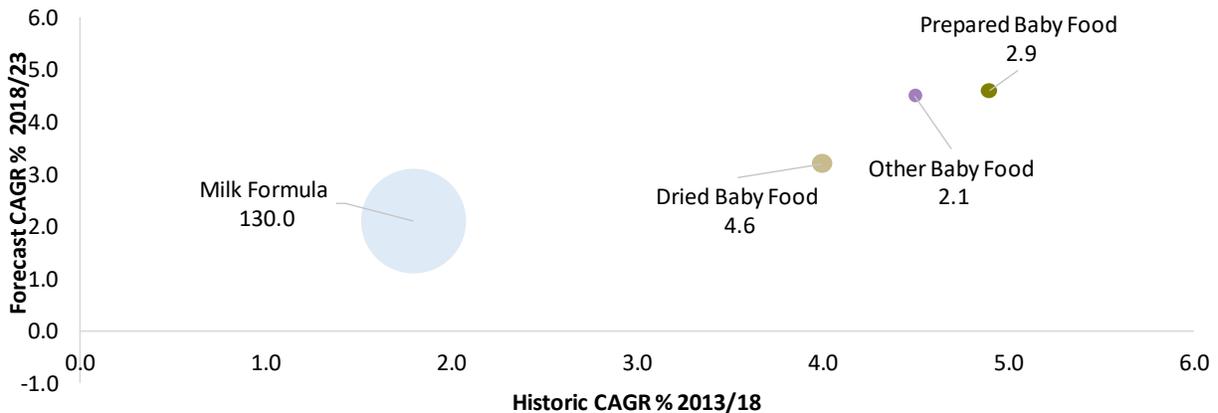
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Niche markets like organic baby food and special baby milk formula largely come from the EU. ▪ EU producers make up a large amount of baby food exports to Singapore, with the Netherlands being the largest exporter. 	<ul style="list-style-type: none"> ▪ The government has implemented laws that restrict the advertising abilities of producers. ▪ Singapore has a very low fertility rate of 1.2 children per women.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Citizens living busy lives are attracted to the convenience of Baby food products. ▪ A rising health conscious population will be likely to purchase natural products for their children. 	<ul style="list-style-type: none"> ▪ Breastfeeding is still more common due to the price of baby food formula in one of the world's most expensive countries. ▪ The sales of infant food ethics committee (SIFECS) continues to advocate against baby food product consumption.

5.11.2 Consumption

5.11.2.1 Evolution of consumption

The growth in demand for baby food products in Singapore has been slowing in recent years due to several factors including the low fertility rate in Singapore at just 1.2 children per women which is hurting the market for baby food products. This is despite efforts from the Singaporean government to raise the fertility rate and hence stop the decline in births. Another big factor in the declining market is the promotion of breastfeeding in Singapore coupled by a campaign from the Sales of infant food ethics committee (SIFECS) to prohibit the sale of milk formula intended for infants under the age of six months through the internet. Milk formula is by far the most popular baby food product in Singapore with a market value of EUR 130m, however consumption is slowing down as shown by the low annual growth of under 2% per year over the period 2013-18 (Figure 5-48).

Figure 5-48: Evolution and forecast of prepared baby food market in Singapore, 2013-2023; retail value, EUR million



Source: Euromonitor International: Packaged Food, 2020.

5.11.2.2 Consumer profile and purchase criteria

Consumers

The huge costs of living in Singapore coupled with a developed economy with an educated population has led to a sharp decline in births in the country. In 2018 under 40 000 births were recorded in the country, a decline of 1.5% on the number the year before. This severely limits the number of potential consumers, and as noted above the promotion of breast feeding has further impacts. However, despite there being a limitation on the advertising of milk formula online targeting babies under six months⁹⁴, internet retailing is growing increasingly popular in this sector as a matter of convenience for parents that are busy managing work and family lives. More affluent Singaporean parents are also becoming increasingly interested in organic baby food which creates a niche market for producers to exploit in the future. Prepared and dried baby food markets, typically attractive to consumers seeking a convenient product.

Drivers and method of consumption

As the number of live births in Singapore is low the market is limited, parents living busy lives in the city-state often need to prioritize their time management and baby formula does provide conveniences in this sense. That said, the push towards breastfeeding has a negative influence on the market.

Purchase criteria

While more affluent consumers will purchase baby food products for the convenience of it as a product, many consumers will instead choose to economize by breastfeeding to keep costs down in one of the world's most expensive countries. The safety of such products typically has a role in the decision making from parents, however thanks to the stringent food regulations and high standards on imports set by the

⁹⁴ See https://www.hpb.gov.sg/docs/default-source/default-document-library/5th-edition-of-the-sifecs-code-as-of-020119.pdf?sfvrsn=8249c572_2 for more details.

Singaporean government, parents are confident that the baby food products they purchase in Singapore are safe for their children.⁹⁵

5.11.2.3 Recent market trends

Over the next few years, it is predicted that formula milk will grow at just over 2% per year, while other baby foods grow more quickly. Niche products in the formula milk sector such as special baby milk formula have fairly fast growth of late. Other niche products such as organic baby food is also likely to experience growth during the upcoming forecast period up until 2023. Movements from the SIFECs will likely threaten this sector with initiatives such as the code of ethics which became active on January 1st, 2020; this code of ethics limits the ability of producers of products for babies from 0-12 months⁹⁶ to advertise their products on Singaporean media outlets and could lead to a situation where the main advertisements for baby food producers will come from word of mouth recommendations from consumer to consumer. This is indeed a notable threat to the baby food market going forwards.

5.11.3 Offer

5.11.3.1 Domestic production

Multinational companies continue to dominate the market in Singapore coupled with the lack of a culture of baby food consumption, lack of births and a hostile advertisement environment leads to domestic producers having many barriers to entry for this market. Local brands are focusing on offering price-conscious options for consumers with a greater awareness of the cost of living situation in Singapore. One example of domestic production from a local brand in this field comes from the Fairprice label and its gold milk formula brand which despite the many barriers to entry has continued to grow and gain a respectable foothold in the market. However, there are some multinationals which manufacture in Singapore; most notably Abbott manufacturing Singapore (part of the American company Abbott) produces some 45 000 tonnes of powder nutritional products which includes infant formula and growing up milk. A notable part of these products is shipped to wider Asian markets and the domestic market is quite small.

5.11.3.2 Imports and exports

Singapore as a transit hub exports much more than it imports however very few products are produced in Singapore. A large amount of baby food formulas produced in other parts of Asia such as Malaysia and Vietnam are sent to Singapore to be exported to nations like The Netherlands. Geographically close nations like Thailand, Vietnam, and Malaysia are also a major destination for baby food products sent through Singapore. Singapore imports a sizable amount of its baby food products from Malaysia and also from the EU with countries like The Netherlands and Ireland account for over 30% of Singapore's imports of baby food.

⁹⁵ Baby food 101 : the basics all mums and dads should know, The Asian Parent, Singapore> Available at : <https://sg.theasianparent.com/baby-food-basics>

⁹⁶ The scope was previously 0-6 months but expanded to 0-12 months in the last revision.

As noted in Figure 5-50 exports from Singapore far exceed the level of imports by quite a large margin. It is important to note that many western producers exporting to wider Asian markets will use Singapore as a transit hub which inflates export figures. This is reflected through the destination countries of baby food exported through Singapore with the four largest importers of Singaporean baby food being Vietnam, Thailand, The Philippines and Malaysia.⁹⁷ Singapore imports a small amount of baby food products mainly from western markets with The Netherlands, Switzerland, Ireland and Australia being the biggest exporters of baby food to Singapore. Companies such as abbot who produce baby food products in Singapore largely export to China, Vietnam and Malaysia.

Figure 5-49: Trade balance (imports and exports) of food preparations for infant use in Singapore, 2014-18; value EUR 000

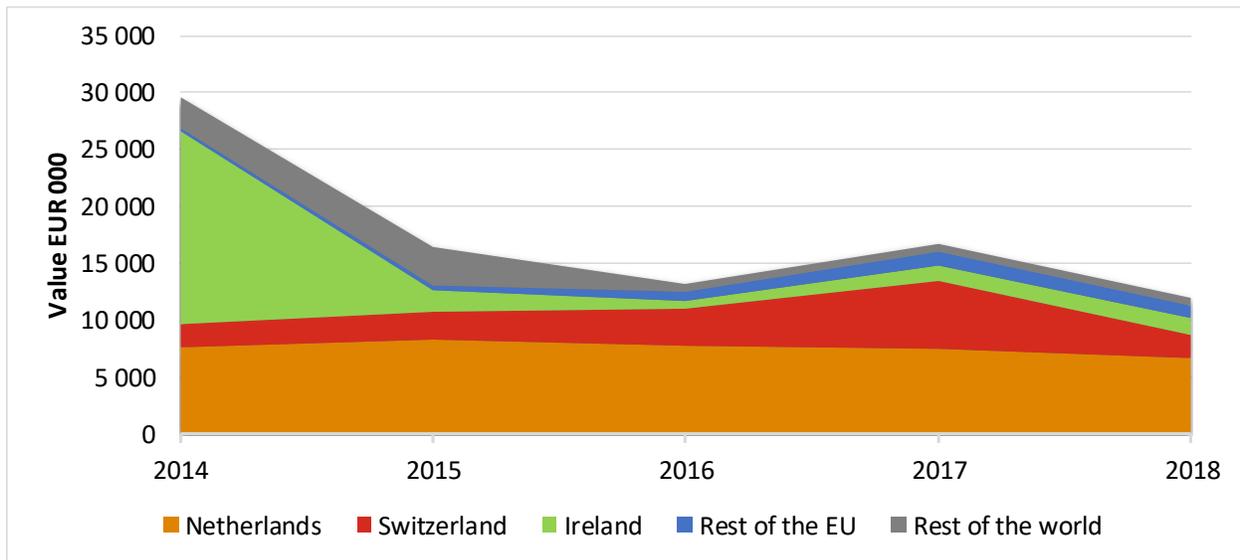


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 190110

Singapore Imports a small amount of baby food products mainly from western markets with The Netherlands, Switzerland, Ireland and Australia being the biggest exporters of baby food to Singapore (Figure 5-50).

⁹⁷ Abbot Pediatric Nutrition Manufacturing Facility, Food Processing Technology <https://www.foodprocessing-technology.com/projects/abbotpediatric/>

Figure 5-50: Singaporean imports of food preparations for infant use by country, 2014-18; value EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 190110

5.11.3.3 EU GI products

There are no baby food products registered as a Geographical indication under the EUSFTA. For a full list of GIs please refer to section 9.

5.11.3.4 Main competitors

The main competitors for EU producers come from locally produced infant milks. EU producers benefit from the growing niche market for organic goods and special milk formula that largely come from the EU. EU products in this niche market also face smaller competition from the USA and Australia.

5.11.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, baby food in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act, though there are further specificities in the food regulations that must be respected (see below).

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European baby food products imported into Singapore are not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by entering the corresponding CN code:

e.g. <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=190110>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for baby food can be found on the website indicated in the box below. Depending on the precise product, it may include, among others: a certificate of statement of product standards; certificate of hygiene and safety; certificate of food safety and hygiene standards; and a veterinary health certificate for animal products.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website by entering the corresponding CN code:

e.g. <https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=190110&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of baby food into Singapore are in line with international standards.

There is a long list of specific conditions that infant formula must fulfil, e.g. not less than 8 mg Vitamin C (ascorbic acid) per 100 kcal. These are identified in the Food Regulations Nos 252 and 253 (available at: <https://sso.agc.gov.sg/SL/SFA1973-RG1>). These Regulations should be consulted for a comprehensive list of conditions.

Furthermore, there are restrictions: melamine must not exceed 1ppm in powdered infant formula; 0.15ppm in liquid infant formula; and there are also maximum levels for mycotoxins.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFpubli.htm?doc=overview&hscod=190110&countryid=SG#h15>

Labelling

Baby food must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. Infant foods must be date marked (as also set out in section 4.2.3). In addition to this there are precise labelling requirements set out in the Food Regulations (no 254). In summary it is necessary to indicate:

- the source of protein;
- direction for preparation;
- warning statement on the health hazards of improper use;
- energy and protein per 100ml;
- quantity of each vitamin and mineral per 100ml;
- serving suggestion for different ages;

- directions for storage;
- a note that infants over 6 months should also receive supplemental foods in addition to formula milk;
- an “important notice” statement to indicate breast milk is best for infants and infant formula should be used on the advice of a medical practitioner.

As noted in section 5.11.2, there are also very strict conditions on claims and advertisements. Full details can be found in the advertising code which is available at: https://www.hpb.gov.sg/docs/default-source/default-document-library/5th-edition-of-the-sifecs-code_as-of-020119.pdf?sfvrsn=8249c572_2

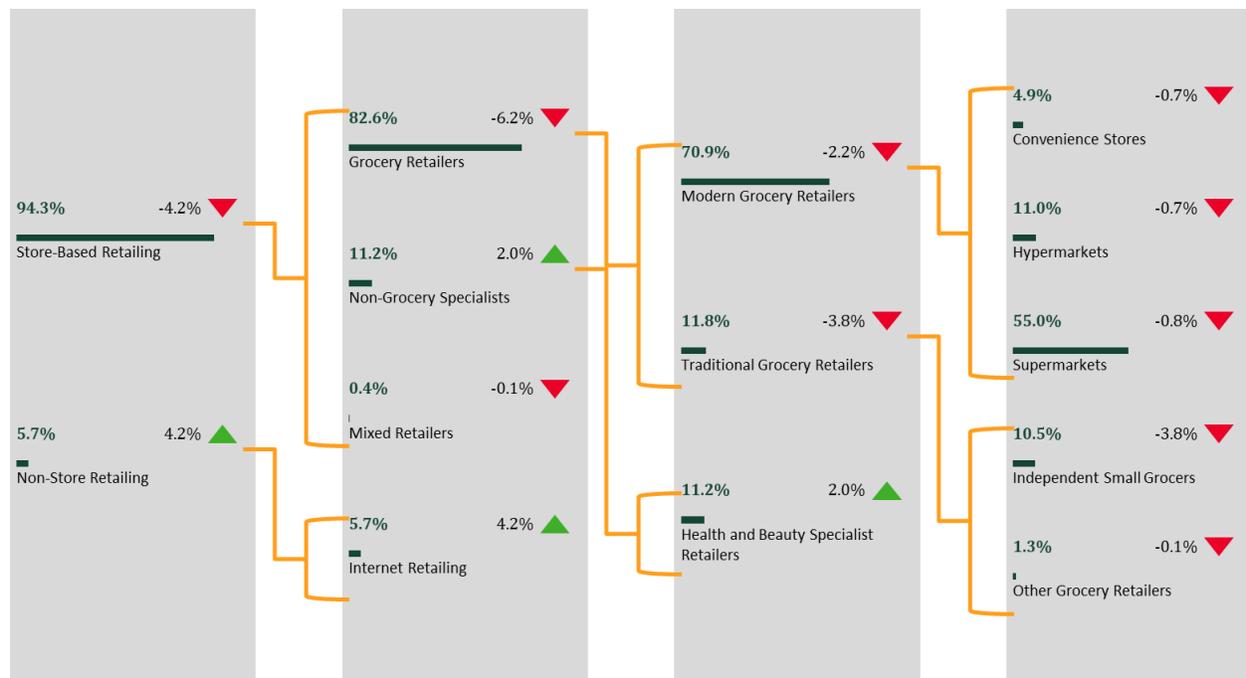
It is strongly recommended to consult the Food Regulations for full details:

<https://sso.agc.gov.sg/SL/SFA1973-RG1>

5.11.5 Distribution

As noted in Figure 5-51 the majority of baby food products distributed in the Singaporean market come from supermarkets with 55%. Other important distributors include Hypermarkets and smaller independent traders, each of which account for approximately 11%. As is common across almost all products, internet retailing is growing and grew by a large market, up 4.2 percentage points over the period 2013-18 to 5.7%.

Figure 5-51: Distribution channel overview of prepared baby food in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

5.11.6 Challenges for EU products

The main challenges for EU products entering the Singaporean market include a low fertility rate which limits the market demand for baby food products; and the position of the government which has also come out in favour of breastfeeding and have subsequently implemented regulations that limit the abilities of producers in Singapore to advertise their products. Finally, the importance of domestic producers should not be underestimated.

Market Takeaway: Prepared baby food

Consumption: Consumed by a small consumer base that is shrinking due to a decline birth rate.

Competition: Cheaper alternatives from both domestically and countries nearby such as Malaysia and China provide competition for EU producers.

Distribution: Majority of baby food products are distributed from supermarkets at 55%. Internet retailing is growing quickly and grew 4.2% in 2019.

Challenges: A hostile advertising environment coupled with ongoing efforts by the government to limit baby food sales and distribution.

Opportunities: Niche markets such as organic food and special baby milk formula provide an opportunity for EU producers.

5.12 Processed fruit and vegetables

5.12.1 SWOT analysis

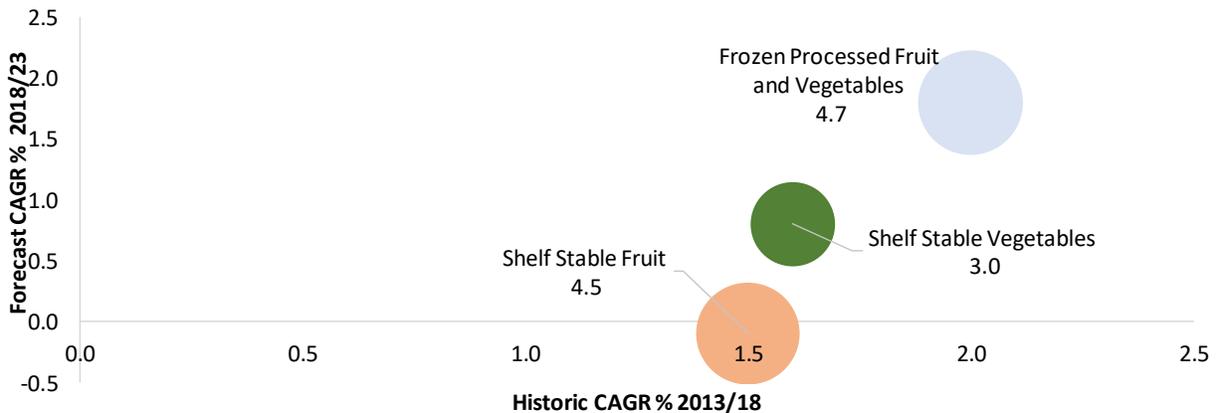
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Processed fruit and vegetable products are consumed across ethnic and monetary lines. ▪ Singaporean value the convenience processed fruit and vegetable bring them. 	<ul style="list-style-type: none"> ▪ The USA and China have a large share of the market of these products in Singapore and producers there have developed relationship with Singaporean importers and distributors. ▪ The growth rate for processed fruit and vegetable products is low with fresh preferred.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ The EUSFTA agreement allowed for EU producers to establish relationships with Singaporean importers and distributors. ▪ Processed fruit and vegetables are used in many restaurants in Singapore to cut costs. 	<ul style="list-style-type: none"> ▪ The influential government of Singapore has actively advocated against processed food and sugar production which includes a complete ban on partially hydrogenated oils as an ingredient in food by 2021. ▪ The population has shown a preference towards fresh fruit and vegetable products over processed fruit and vegetable products.

5.12.2 Consumption

5.12.2.1 Evolution of consumption

Processed fruit and vegetable sales are stabilizing in Singapore. Unit prices remain stagnant due to low consumer demand and a lack of premiumization efforts from producers. Shelf-stable fruit had a retail value of EUR 4.5m in 2018, and shelf stable vegetable products EUR 3m. Growth of both segments was slow over the period 2013-18 at 1.5 and 1.6% respectively. Frozen processed fruit and vegetable products had a total retail value of just under EUR 5m but grew at 2% per year over the 2013-18 period. Rising consumer preference for fresh fruit and vegetable products and their wide availability of these products pose a threat to the sales of processed fruit and vegetable products.

Figure 5-52: Evolution and forecast of the market for processed fruit and vegetables (EUR million) in Singapore, 2013-2023



Source: Euromonitor International: Packaged Food, 2020.

5.12.2.2 Consumer profile and purchase criteria

Consumers

Consumers of processed fruit and vegetable products span across ethnic and monetary lines as the variety of processed fruit and vegetable products available on the market has a huge influence on consumer outreach. This can be observed in dishes from different ethnic groups that commonly incorporating processed fruit and vegetables:

- **Indians:** A common dish amongst ethnic Indians in Singapore is Rujak, which is made from fruit, vegetables, and palm sugar and increasingly incorporates processed fruit and vegetable products to accelerate the process of cooking.
- **Chinese:** Being the largest ethnic group in Singapore, the Chinese have a variety of dishes that incorporate processed fruit and vegetable products such as Banmian and Wonton Noodles which largely use spinach, cabbage and green onions.
- **Malay:** Singapore being located so close to Malaysia coupled with the large Malay population in the country has influenced the dishes found there. Popular dishes that incorporate processed fruit and vegetable products include Kangkung Belacan and Penang Rojak which use green apples, mangoes and cucumber.
- **Western expats:** may have adopted western consumer habits in Singapore may also be open to regularly consuming processed fruit and vegetable products through products like processed French fries and processed fruit found in deserts and bakery products.

Drivers and method of consumption

While these products are found throughout Singapore there are many drivers pushing consumers away from consumption such as government policies on processed food and sugar (which has impacted consumer behaviour) and a recent ban implemented in July 2019 that led to a ban on partially hydrogenated oils as an ingredient in food by 2021 which directly affects the sales on processed potato products. However, government policies have also helped with the consumption of processed fruit and

vegetable products in the case of restaurants. The Singaporean government exercises tight controls on foreign workers and coupled with high rental costs in the country this led to foodservice outlets using processed fruit and vegetable products to cut down on time and labour. Processed fruit and vegetable require less manpower to prepare and is a cheaper alternative which allows for a driver in consumption amongst consumers eating at local restaurants.

Purchase criteria

The variety of these products allows for a variety of purchase criteria. Higher-income earners are more likely to be more health-conscious and may even purchase fresh fruit and vegetable alternatives. Processed fruit and vegetable does provide a quick source meal for consumers which influences the purchasing criteria of the product.⁹⁸

5.12.2.3 Recent market trends

As stated above, the government's recent crackdown on partially hydrogenated oils as a food ingredient coupled with a campaign against the consumption of sugar has negatively impacted the market for processed fruit and vegetable products. With more laws likely to pass in the future as the government becomes increasingly concerned with rising healthcare costs and the health of the population there could be more impacts on this market from government interference in the future. These issues are factored into projected growth rates: shelf stable processed fruit is forecast to shrink marginally at 0.1% per year over the period 2019-23. Forecast growth rates for shelf stable processed vegetables and frozen processed fruit and vegetables are low at 0.8% and 1.8% per year respectively; with frozen products supported by the advantages they can provide in cutting down preparation times.

5.12.3 Offer

5.12.3.1 Domestic production

The domestic production of process fruit and vegetables is very small in Singapore with virtually all ingredients and materials required to produce processed fruit and vegetable products having to be imported from abroad.

5.12.3.2 Imports and exports

Identifying data on trade in processed fruit and vegetable product is extremely complicated due to the number of different lines under which such products can be imported. It is even further complicated by the fact that Singapore acts as a transit hub for these products, meaning that even if data were identifiable, a significant proportion of imports would likely be re-exported. Data on-trade in processed fruit and vegetables is ultimately captured under the trade data for fruit and vegetables in section 5.2.3.2.

⁹⁸ Euromonitor International: Packaged Food, 2020.

5.12.3.3 EU GI products

Various EU GIs for fruit and vegetables were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration which could theoretically cover fruit and vegetables that are processed to some extent include:

- Pruneaux d'Agen (France)
- Ελιά Καλαμάτας (Elia Kalamatas) (Greece)

Section 9 can be consulted for a full list.

5.12.3.4 Main competitors

As identified in section 5.11.3.1, the domestic production of processed fruit and vegetable products is small. As stated in section 5.11.3.2, there is considerable difficulty in identifying trade data on processed fruit and vegetables. However, the main competitors for EU producers can be assumed to be coming from importers; and most likely from markets and producers located near Singapore such as Malaysia and Thailand, plus the USA and Australia.⁹⁹

5.12.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, processed fruit and vegetable products in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European processed fruit and vegetable products imported into Singapore are not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by entering the corresponding CN code:

e.g. <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=0801>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically processed fruit and vegetables can be found by looking for the appropriate CN code at the website indicated in the box below.

⁹⁹ USDA Gains Report, Food processing ingredients, Singapore annual 2019 https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Food%20Processing%20Ingre%20dients_Singapore_Singapore_7-29-2019.pdf

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website by entering the corresponding CN code:
e.g. <https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=0801&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of processed fruit and vegetables into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:
<https://madb.europa.eu/madb/viewPageIFpubli.htm?doc=overview&hscod=0801&countryid=SG#h15>

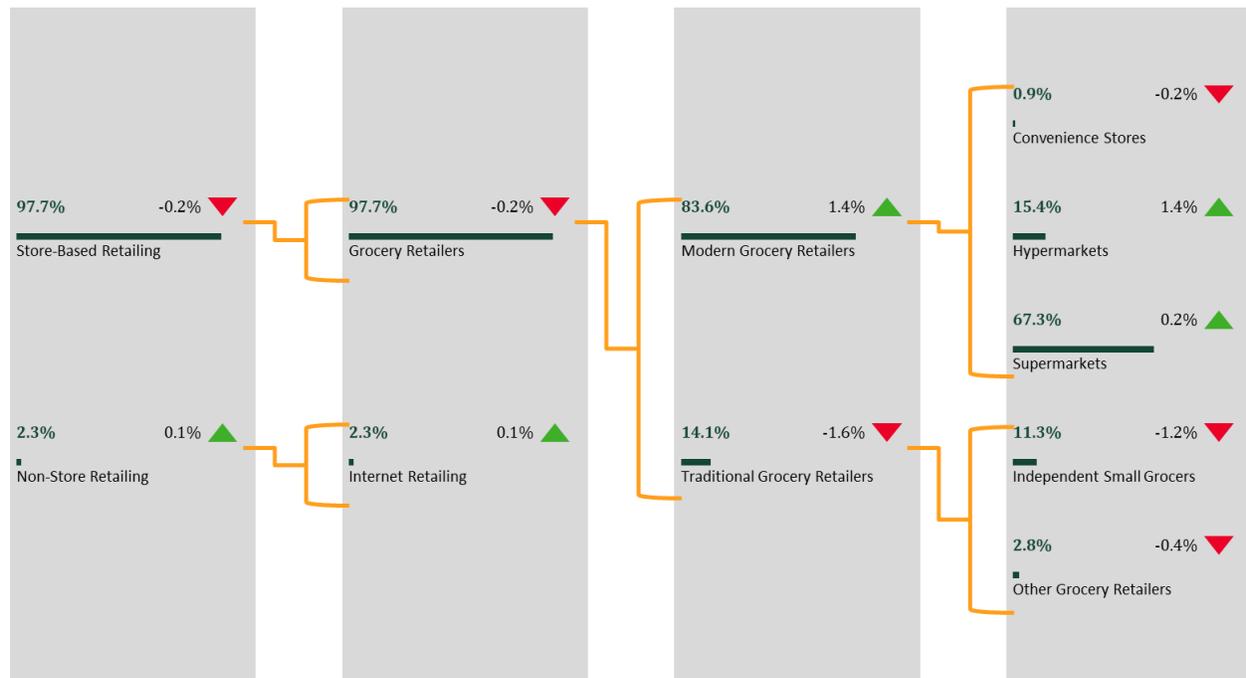
Labelling

Processed fruit and vegetables must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. Any processed fruit or vegetable products that need to be stored at a chilling temperature to maintain or prolong their durable life must be date marked, as set out in section 4.2.3.

5.12.5 Distribution

As noted in Figure 5-53 the absolute majority of processed fruit and vegetable products in Singapore are purchased from supermarkets with 67% of all sales. Hypermarkets account for a sizable sum with 15%; and traditional retailers accounting for a further 11%. Internet retailing is growing very slowly with 2.3% share.

Figure 5-53: distribution of processed fruit and vegetables in Singapore (2018); retail value



Source: Euromonitor International: Packaged food, 2020.

5.12.6 Challenges for EU products

EU processed fruit and vegetable products entering the Singaporean market face a number of challenges. The population is increasingly health conscious and consumers have demonstrated a preference for fresh fruit and vegetable products. The government echoes this trend with the implementation of laws that discourage process fruit and vegetable production and consumption such as the ban on partially hydrogenated oils as an ingredient in food by 2021. These two factors have led to low forecast growth rates going forwards.

Market Takeaway: Processed fruit and vegetables

Consumption: Consumed by all members of society in a variety of ways from restaurants to homemade processed meals.

Competition: while data is lacking, assumed to be third countries such as USA and China.

Distribution: Processed fruit and vegetable products largely sold through supermarkets (67%) with a sizable amount also distributed through hypermarkets (15%) and independent grocers (11%).

Challenges: The government has actively advocated against the consumption of processed fruit and vegetable products for different reasons and has implemented laws to this effect.

Opportunities: The EUSFTA allows for EU processed fruit and vegetable producers to establish relationships with Singaporean importers and distributors.

5.13 Pasta

5.13.1 SWOT analysis

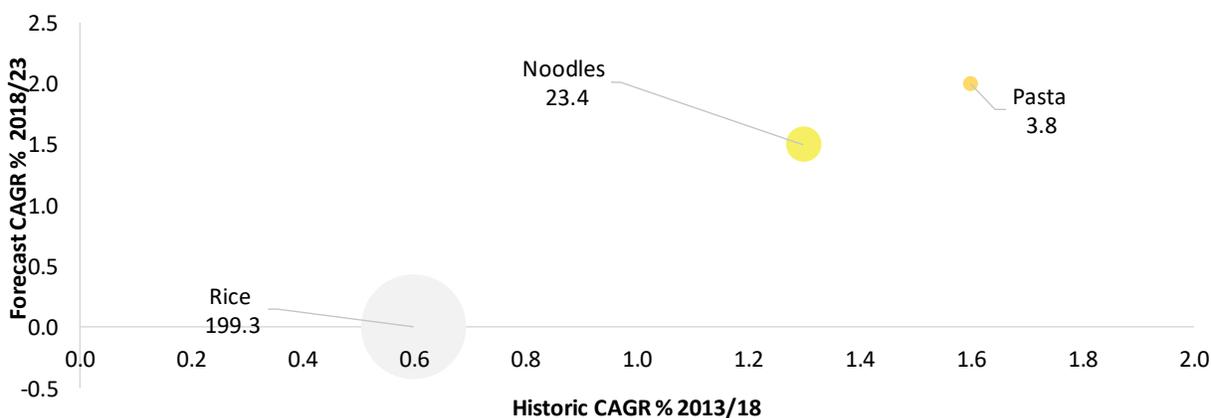
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> International cuisine and international consumers. Open to new flavours. Premiumisation in some areas. 	<ul style="list-style-type: none"> A lot of competition from rice and noodles, which dominate the market. Market for pasta quite saturated.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> Whole wheat pasta. Innovative pasta products based on e.g. pulses such as lentils, chickpeas and yellow peas. Flavoured pasta. 	<ul style="list-style-type: none"> Most imported pasta, noodles and couscous comes from the Asian region itself. High quality products only attractive for a niche market.

5.13.2 Consumption

5.13.2.1 Evolution of consumption

In recent years the pasta consumption of Singaporeans rose slightly. Compared to the markets for rice and noodles the market for pasta is relatively small in volume terms and accounts for under 2% of the combined market. In 2018 the market size for pasta was around 3 800 tonnes as shown in Figure 5-54. Between 2013 and 2018 the market for pasta grew at a CAGR of about 1.6% and is forecast to grow even more in the coming years (Figure 5-54). That said, the pasta market is forecast to grow by a CARG of 2% between 2018 and 2023. However, the per capita consumption is forecast to stay the same at more or less 0.7 kg. In value terms the pasta market is also small compared to those of noodles and rice as well. It had a value of EUR 8.2 million in 2018.

Figure 5-54: Evolution and forecast of market for pasta compared to rice and noodles (000 tonnes) in Singapore, 2013-2023



Source: Euromonitor International: Packaged Food, 2020.

Note: figures for 2019 to 2023 based on forecasts.

5.13.2.2 Consumer profile and purchase criteria

Consumers

Singaporean consumers like to try new products and flavours and like to try pasta trends (see 3.3.1.1). Italian restaurants in particular are popular. Four out of the best 10 ranked restaurants currently on Tripadvisor are Italian, demonstrating the extent to which means Singaporeans in general enjoy pasta dishes, regardless of their age or cultural background.¹⁰⁰ However, people who consume pasta outside restaurants and on a more regular basis are likely to be western expats because of their cultural backgrounds. These expats usually prefer basic products and are not necessarily interested in exotic or innovative pasta products. In conclusion, even though pasta is popular in Singapore and can be used as a side dish just like rice and noodles, it is still more of a niche market.

Drivers and method of consumption

Pasta is used for cooking at home a lot because they are fast to cook and compared to other products more on the cheap side. However, due to the trend of increasingly eating out pasta are also popular in restaurants. Singaporeans like the Italian cuisine a lot, which is why there are many Italian restaurants in the city-state, and these are a driver for pasta consumption.¹⁰¹

Purchase criteria

Even though Singaporeans have high disposable incomes, as pasta is a staple the majority of consumers prefer decently priced pasta. Thus, most consumers choose middle or low-range priced products. One main criteria which helps consumers decide is nutrition. Consumers tend to mostly choose pasta types that are perceived as healthier than others like wholegrain pasta. High-income consumers mostly nevertheless choose premium quality products, which means there is a demand for high quality pasta products, even though those products are not suited for the Singaporean mass market. Moreover, the amount of pasta consumed depends on the consumers taste, but also their background.¹⁰²

5.13.2.3 Recent market trends

Driven by the health trend, there is a recent interest in pasta products made from wholegrains and pulses. This development is even enhanced by the Singaporean government, which released different advertisements promoting benefits of whole grain products. Due to those developments, wholegrain pasta is the preferred pasta type of the Singaporean mass market.

The pasta market has a big potential for new, innovative and exotic tasting pasta products, such as pasta made from seaweed or cauliflower. Those products are perceived to be not only innovative because of their ingredients, but also healthier and/or favoured by certain consumers because they do not contain gluten or carbohydrates. Innovation will be key for the coming years. However, those niche products will

¹⁰⁰ Why is pasta so shiok? <https://sbr.com.sg/food-beverage/commentary/why-pasta-so-shiok>; Restaurants in Singapore <https://www.tripadvisor.be/Restaurants-g294265-Singapore.html>

¹⁰¹ 10 Most Trending Pastas Of All Time Every Singaporean Foodie must Learn To Make <https://thesmartlocal.com/read/trending-pastas/>

¹⁰² Euromonitor International: Packaged Food, 2020.

be too expensive to reach the mass consumer thus innovation suitable for the mass market will be needed as well. One emerging idea is pasta with spices and pulses such as chickpeas yellow peas and lentils.

5.13.3 Offer

5.13.3.1 Domestic production

Singapore being a city-state does not leave a lot of possibilities for domestic pasta production, and furthermore, with noodles a lot more popular, local producers such as Leon Guan tend to focus on this product rather than pasta. Moreover, Singapore being a hub and the entry door to Asia having a big perfectly connected port, and pasta being a non-perishable food makes easy to import pasta from different origins. The lack of domestic production can be viewed as good possibility for EU producers to export their products. However, due to its connectivity and westernized culture the competition with other countries is always present.

5.13.3.2 Imports and exports

Singapore imports more pasta, noodles and couscous than it exports. In 2014 the country imported EUR 87m of these products. Imports grew steadily between 2014 and 2019. By contrast, exports have remained fairly flat over the same period at around EUR 40m (Figure 5-55).

Figure 5-55: Trade balance (imports and exports) of pasta, noodles and couscous in Singapore, 2014-18; tonnes

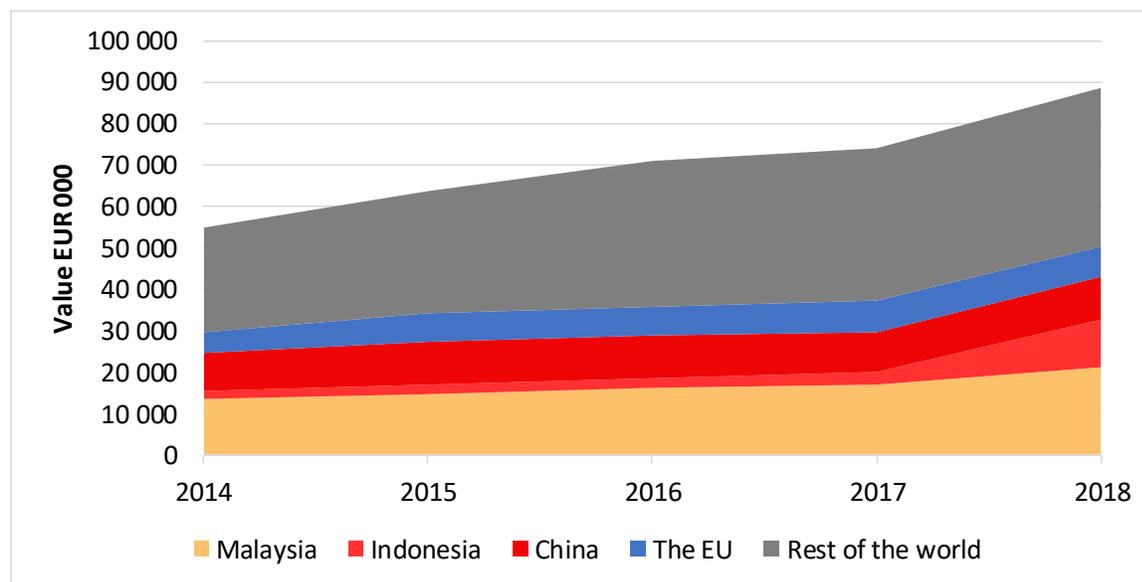


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1902.

Sources of imports are fragmented. In 2018 the largest importer of pasta, noodles and couscous imports was Malaysia, with EUR 21m. However, this was less than ¼ of all imports by value (though slightly more in volume terms). The second biggest exporter is Indonesia, which accounts for only 1/8 of imports by value. The importance of these countries can be explained by the data presented covering not only pasta,

but also couscous and noodles. EU countries account for under 10% of imports into Singapore, with only Italy standing out as being a notable source, accounting for over 80% of all EU exports to Singapore by value (Figure 5-56).

Figure 5-56: Singaporean imports of pasta, noodles and couscous by country, 2014-2018; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1902.

5.13.3.3 Main competitors

The main EU exporter is, of course, Italy, which exported close to 5 000 tonnes worth just under EUR 7m. However, it only ranks the 4th best exporter in quantity and only 7th highest in value terms. The biggest three exporters in both categories are the neighbouring Malaysia, Indonesia and China, which makes the Asian market the biggest competitor; though the products they export to Singapore are primarily noodles, rather than pasta. The most popular pasta brands in Singapore are San Remo, Barilla and Maicar.

5.13.4 Specific market entry requirements

Market Access and Entry

For pasta the goods and services tax (GST) is imposed at a rate of 7%. Other than that, there are no other specific market entry rules for pasta products.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=1902>

Customs procedures

A list of standard documents required to import pasta into Singapore is presented in Table 4-1 in section 4.2.1. Besides those listed regulation there are no specific requirements on customs procedures for pasta.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=1902&countryid=SG#h8>

SPS measures

Sanitary and Phytosanitary measures concerning the import of pasta into Singapore are in line with regular international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=1902&countryid=SG#h15>

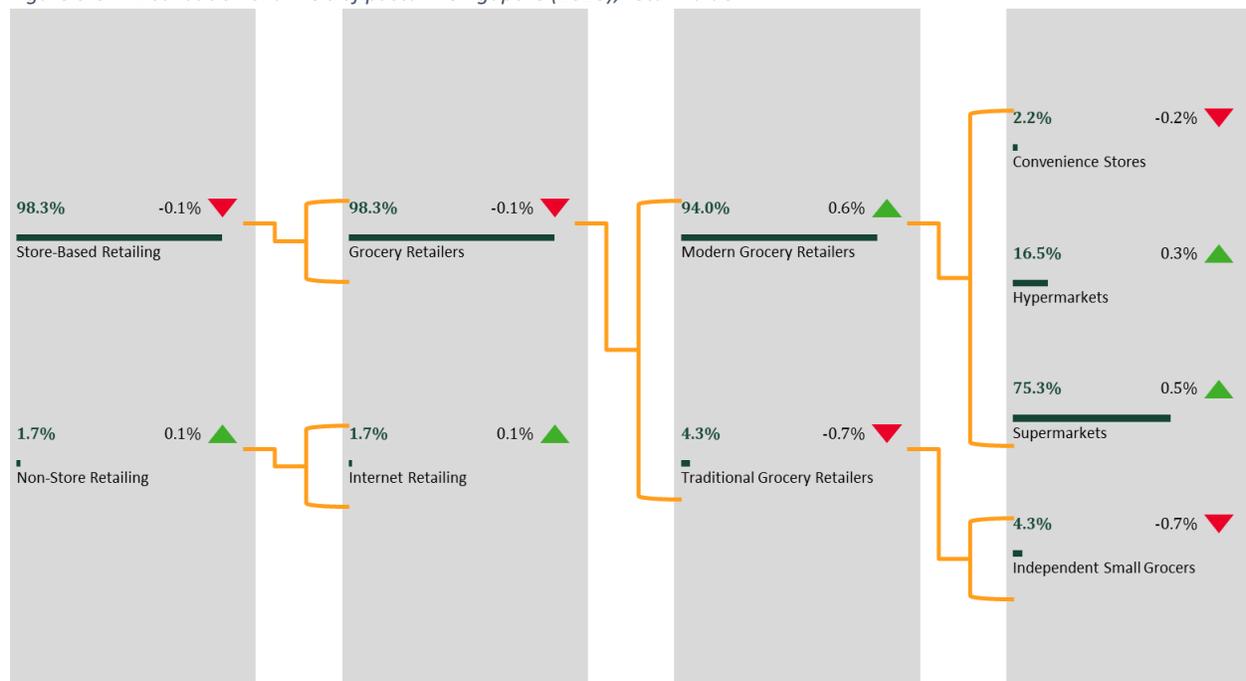
Labelling

Pasta must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. Any pasta products that need to be stored at a chilling temperature to maintain or prolong their durable life must be date marked, as set out in section 4.2.3.

5.13.5 Distribution

Even though Singaporeans love to dine out and Italian restaurants are especially popular, retail is the main channel for pasta, accounting for around 70% of volume. Among retail channels, over 98% of pasta gets sold off-trade in regular grocery stores. About 3/4th gets sold in Supermarkets and about 20% in Hypermarkets. Additionally, a small amount of pasta (1.7%) is sold online. The online retail sector for pasta is still minor, but indeed increasing. This increase is in line with the ongoing trend to switch from store-based retailing to internet based one and is due to the fact that Singaporeans increasingly use their mobile phones for all kind of activities (Figure 5-57).

Figure 5-57: Distribution channels of pasta in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

5.13.6 Challenges for EU products

The main challenge is that rice and noodles are consumed in much greater quantities than pasta. Most notably, the noodle market, which is arguably the closest indirect competition to pasta, is saturated by imports from different countries. Italy is perceived to be the original pasta making country and thus has a special status, but for other EU countries competition is hard as witnessed by the low level of imports from EU countries other than Italy. Products entering the market should be innovative in flavour or branding, should be not too expensive if they are supposed to target the mass market, but can also be exclusive if they target a special niche market.

Market Takeaway: Pasta

Consumption: Pasta consumption is stable and likely to increase slowly in the coming years.

Competition: there is basically no domestic production, thus the main competitors are indirectly with noodles from non-EU countries.

Distribution: mostly off-trade in Super- and Hypermarket, but also in online retail and in Restaurants.

Challenges: rice and noodles are dominant, difficulties to create a product suited for this specific market that can compete with these already established staples.

Opportunities: consumers are very open to try new products and flavours and are furthermore health-oriented, creating niche opportunities for special kinds of pasta.

5.14 Baked goods

5.14.1 SWOT analysis

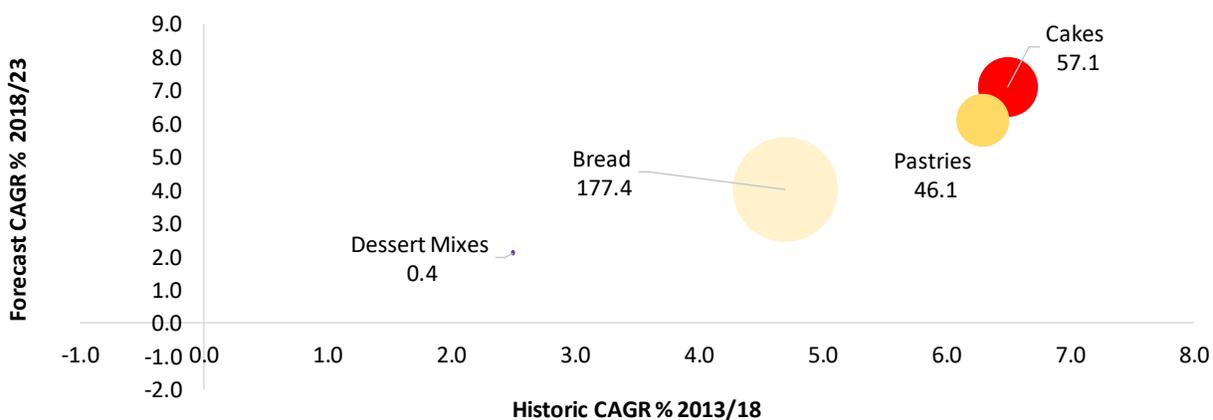
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> High-quality and fresh products preferred. Many western expats who like European products. 	<ul style="list-style-type: none"> Many artisanal bakeries available already. Goods for the mass market are cheap.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> Cakes and pastries markets forecast to grow more than other sectors. Organic and gluten free and vegan niche products Wholegrain baked goods due to health trend. 	<ul style="list-style-type: none"> Biggest exporters are Malaysia, Indonesia and the US. Big brands dominate supermarkets and hypermarkets. Many artisanal bakeries.

5.14.2 Consumption

5.14.2.1 Evolution of consumption

The biggest market for baked goods is the one for bread. In 2018 the market had a value of EUR 177 million. Two other big market in 2018 were the ones for cakes (EUR 57 million) and pastries (EUR 46 million), both of which have grown quickly at over 6% per year during the period 2013-18. However, even both sectors combined had a 40% lower value than the bread market. The smallest market is the one for desert mixes, which had a value of about EUR 0.4 million in 2018 (Figure 5-58).

Figure 5-58: Evolution and forecast of baked goods market in Singapore (million euros), 2013-2023; total value



Source: Euromonitor International: Packaged Food, 2020.

The strong growth of cakes and pastries is set to continue. Between 2018 and 2023 the market value for pastries is forecast to grow at a CAGR of about 6% and the market for cakes even at 7%. The growth rate for the value of the bread market and dessert mixes on the other had are forecast to grow more slowly than historically.

5.14.2.2 Consumer profile and purchase criteria

Consumers

Baked goods consumers in Singapore are from all age groups as well as different income groups. The younger and older population tends to prefer cheaper products, while the majority prefers goods of quality. Singaporean consumers are open for new tastes and innovative products, they are very health conscious and due to their increasing hectic lifestyles like to grab baked goods on the go. Furthermore, as Singaporeans largely value convenience products, baked goods appeal to many consumers who simply do not have the time to prepare meals from scratch.

Drivers and method of consumption

Singaporeans consume a lot of different kind of bread, usually while having breakfast or during short tea breaks. Traditional bread is especially popular within older generations, while bread which is perceived to be healthier (wholegrain) or innovative in flavour is more popular among younger generations. Cakes and pastries mostly are bought as snacks or desserts at different times of the day. They can be a mid-day snack or a dessert after lunch or dinner. There are no set times Singaporeans eat cakes and pastries.¹⁰³

Purchase criteria

Many Singaporeans consume baked goods on a daily basis, especially because they are a fast snack, which they can easily buy during a hectic working day. In recent years consumers have increasingly preferred products from artisanal bakeries because of their freshness, quality and sometimes because of perceived healthiness. Indeed, freshness of products can be considered a purchase criterion for many consumers. Small bakeries offering European style goods are on the rise as well, due to a rise in demand. Furthermore, the growth of the baked goods section will foster the demand for products needed to produce baked goods given Singapore's fundamentally limited agricultural production. Moreover, ready-to-bake and semi-frozen baked goods are important for the catering and hotel sector.¹⁰⁴

5.14.2.3 Recent market trends

Sales of packaged leavened bread have been declining in volume as well as value in recent years. This trend is caused by the rise of many artisanal bakeries, which offer a large variety of fresh bread. Not only are the products fresh, but they come in different sizes, which makes it easier for consumers to find products that suit them well. Smaller portions enable consumers furthermore to experience different flavours more often than if they would only buy packaged leavened bread in Supermarkets. The trend towards artisanal bakeries is also visible in other segments, such as pastries or buns. It is easy to pick up a small treat on the way to work and the freshness of goods is a plus point. Due to their high disposable incomes many consumers prefer to buy from those shops. Most consumers who only stick to packaged products usually belong to lower income families or and the older generations as they often eat bread

¹⁰³ The bakery products sector in Singapore
https://www.flandersinvestmentandtrade.com/export/sites/trade/files/market_studies/BakeryProductsSingapore.pdf

¹⁰⁴ Euromonitor International: Packaged Food, 2020.

daily with spread. In the coming years artisanal bakeries are expected to become dominant and the market for packaged baked goods is forecast to further decline.

However, packaged leavened bread players are trying to adapt to these changes through innovation and premiumisation of their products. To stay up to date with the ongoing health trend producers tend to use healthier ingredients and produce wholemeal bread instead of white bread. Even the Singaporean government tried to foster this switch with some health campaigns about the benefits of wholemeal bread. In the coming years packaged leavened bread producers have to stay innovative to catch attention of new consumer groups as well as to keep their old ones.

A very different trend, targeting the not health-oriented part of consumers is packaged cake. Those cakes are available to the mass market and are especially consumed by children and the old generation. Especially popular are brands such as London, Ego and Apollo. Compared to artisanal made cakes, packaged cakes are cheaper and usually considered more traditional in taste. For the future, the market of packaged cakes is forecast to stay stable and remain dominated by its current main players because of their cheap prices and brand names.

The market for frozen goods as well as on premise bake-of and thaw products is increasing due to the many bakeries, cafes, quick service restaurants and 24/7 convenient stores selling those items.¹⁰⁵ Spring Home, which belongs to Tee Yih Jia – a food manufacturing company with its headquarter in Singapore is the dominant company in this area, and is forecast to stay the number one in this market due to their steady efforts in innovation and taste.¹⁰⁶

5.14.3 Offer

5.14.3.1 Domestic production

Singapore has a number of industrial bakeries, small and medium industrial bakeries, international players of bakery ingredients with headquarters in Singapore and different retail bakery chains. The main retail bakery chain dominating the market is the BreadTalk group. Its headquarter is in Singapore and has 1 000 outlets there, but it also has many outlets in other countries like Malaysia, Thailand and Hong Kong as well. Selling baked goods accounted for 50% of the company's revenue in 2017, namely EUR 200 million. In three executive years BreadTalk won the brand of the year award for the bakeries at the World Branding Award. No other Singaporean bakery ever won this prize before.¹⁰⁷ Furthermore, Gardenia has the largest brand share of packaged baked goods in Singapore with a share of 18.7% but the oldest baker in Singapore, Sunshine bakeries has the second largest at 10.1%.

¹⁰⁵ The bakery products sector in Singapore
https://www.flandersinvestmentandtrade.com/export/sites/trade/files/market_studies/BakeryProductsSingapore.pdf

¹⁰⁶ Euromonitor International: Packaged Food, 2020.

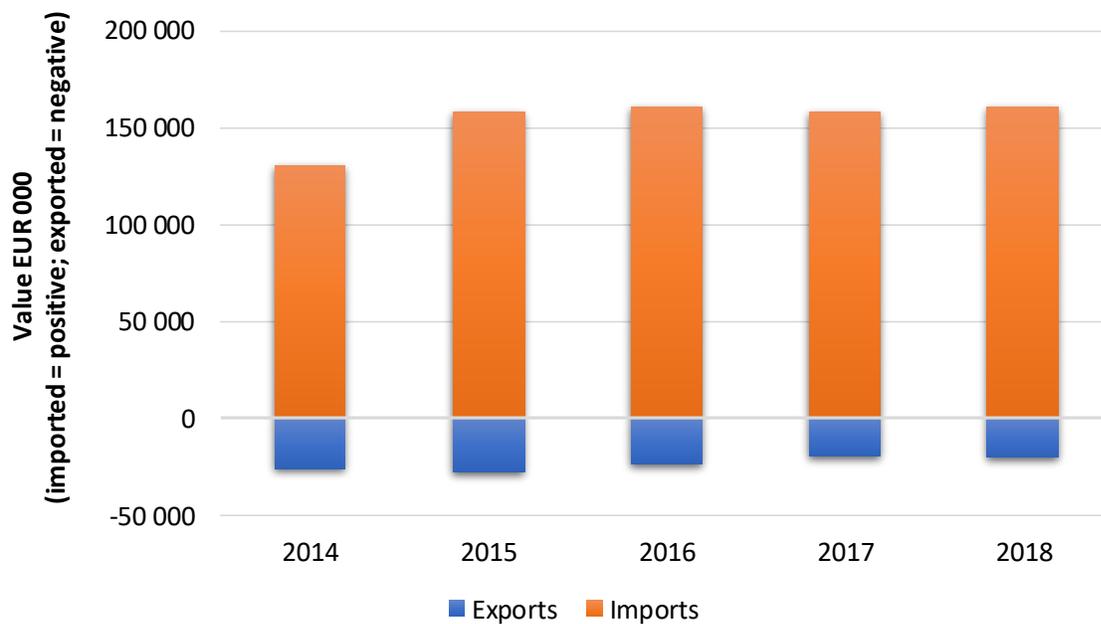
¹⁰⁷ Annual Report 2017 BreadTalk <http://breadtalk.listedcompany.com/misc/ar2017.pdf>

In addition to the large retail and packaged brands above, Singapore has many artisanal bakeries who mostly bake their products fresh every day. The trend of home-based bakeries is growing as well.

5.14.3.2 Imports and exports

Imports of baked goods increased greatly between 2014 and 2015. Since then import values have stayed more or less the same. In 2018 the country imported baked goods with a value of over EUR 163m. Singapore's imported baked goods value is much higher than its exported value, with exported baked goods worth EUR 22m in 2018. The value of exported goods decreased in recent years has decreased, reaffirming the trend in expanding demand for baked goods in Singapore (Figure 5-59).

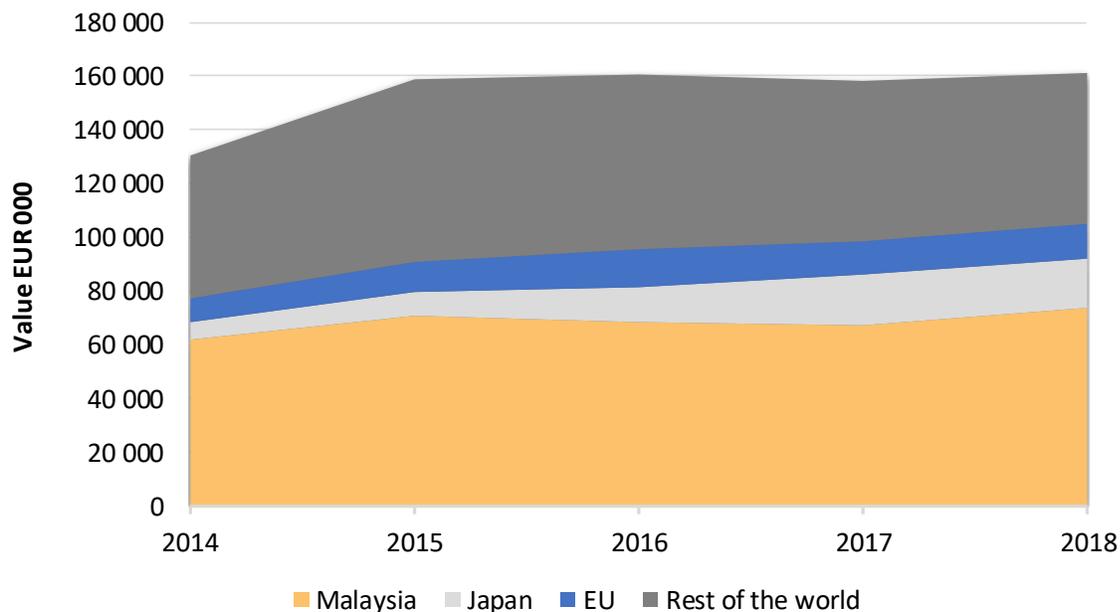
Figure 5-59: Trade balance (imports and exports) of baked goods in Singapore, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN codes 190510, 190520, 190540, 190590.

The main exporter of baked goods to Singapore is the neighbouring country Malaysia with a value of approximately EUR 74m 2018. Ranks two and three go to Japan and the US. Most other exporters are from the Asian region, though France was ranked 7th in value terms in 2018 (Figure 5-61).

Figure 5-60: Singaporean imports of baked goods by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN codes 190510, 190520, 190540, 190590.

5.14.3.3 EU GI products

A handful of baked good GIs were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing include:

- **Germany:** Aachener Printen, Nürnberger Lebkuchen

It is recommended to check section 9 for a full list of GIs registered under the FTA and those which were listed for protection but have not completed registration (so are currently not protected).

5.14.3.4 Main competitors

The main competitors for EU baked good exports to Singapore are (1) local producers (as stated in 5.14.3.1), most notably artisanal ones, whether chains e.g. BreadTalk or independent outlets; and (2) the neighbouring Asian countries Malaysia and Indonesia. However, the US is also one of the bigger exporters and cannot be neglected as a competitor.

5.14.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, baked goods in Singapore fall into the category of processed foods; and as such must comply with the Sale of food act. In the unlikely case they contain more than 5% meat content, they will be considered a meat product and the corresponding requirements will apply. Facility accreditation requirements for meat apply if they contain any beef content.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free for products classed as processed foods.

In terms of tariffs, currently European bakery products imported into Singapore are not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by entering the corresponding CN code:
e.g. <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=190510>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for baked goods can be found on the websites indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website by entering the corresponding CN code:
e.g. <https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=190510&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of baked goods into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:
<https://madb.europa.eu/madb/viewPageIFpubli.htm?doc=overview&hscod=1905&countryid=SG#h15>

Labelling

Baked goods must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3. Any baked goods that need to be stored at a chilling temperature to maintain or prolong their durable life must be date marked, as set out in section 4.2.3. The Food Regulations also contain certain criteria that different baked goods must fulfil to be described as such (e.g. **Wholemeal bread shall be bread made from wholemeal flour or a mixture of wholemeal flour and other flours. It shall contain not less than 0.6% fibre calculated on the dry matter of bread and shall not contain any colouring molasses or caramel**).

5.14.5 Distribution

Nearly all baked goods (99.4%) are sold store-based by grocery retailers. Within this retail sector, traditional grocery retailers are more than two times as popular as modern grocery retailers, which is caused by the trend to buy baked goods primarily in artisanal bakeries. Those bakeries fall into the specialist stores section shown in Figure 5-61. Their popularity is depicted by their high retail value of about 55%. However, many frozen as well as fresh baked goods are distributed through hypermarkets

and supermarkets through importers and industrial bakers. The ingredients needed for baked goods are usually distributed to bakeries and the foodservice industry through local importers. The biggest supplier of ingredients in Singapore is Phoon Huat Ltd.¹⁰⁸

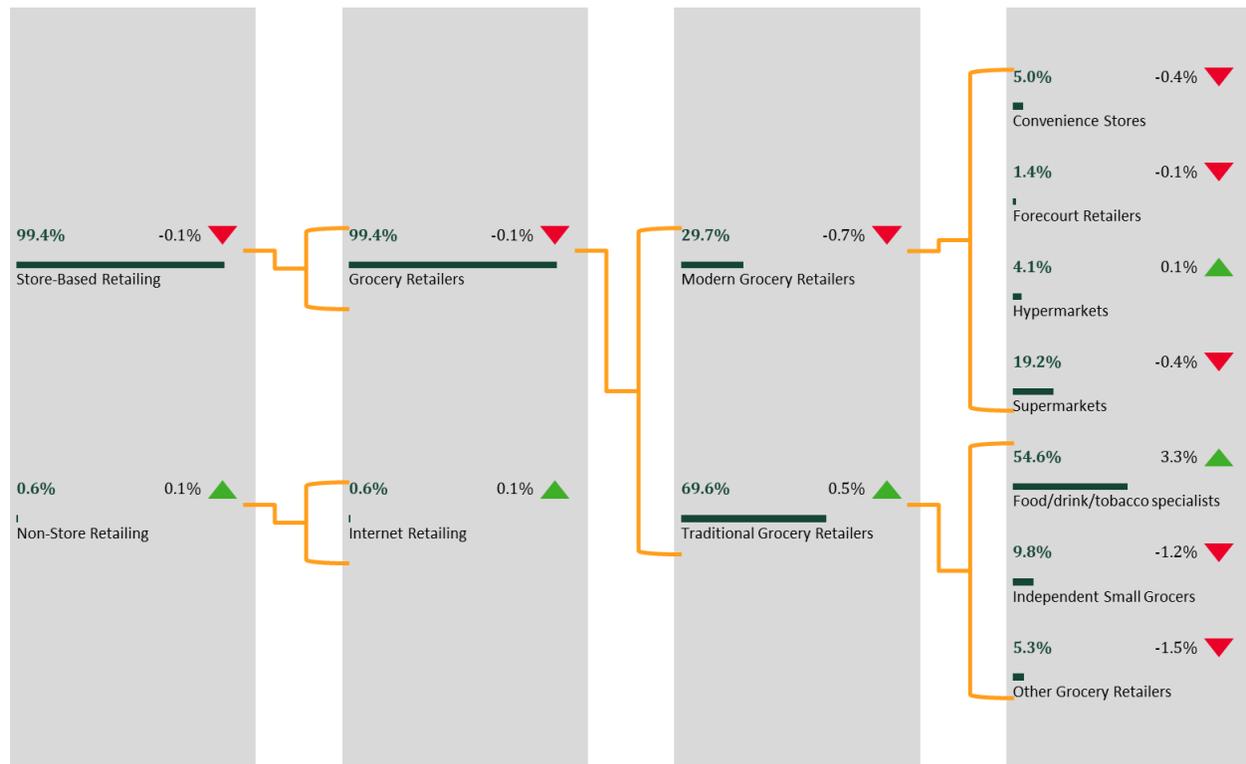
Internet retailing is not a very developed sector (0.6%) for baked goods due to several reasons. First, baked goods are to be consumed as fresh as possible but bought online they need to find their way to consumers first, which means they will not be as fresh as if they are bought in an artisanal bakery for example. Moreover, little bakeries and even supermarkets with packaged baked goods are everywhere and it is easy for consumers to get the product they want on demand. Thus, brick and mortar shops will remain the mainstream channel for the consumption of baked goods in Singapore.

However, the internet retail sector looks promising for some niche products that increasingly get sold via e-bakeries. Currently those homegrown bakeries focus on niches such as gluten-free, dairy-free and super healthy baked goods, which are demanded by very health conscious consumers or those who have special allergies. In the coming years this niche is forecast to grow due to the ongoing health trend. Yet, it will probably remain a niche.¹⁰⁹

¹⁰⁸ The bakery products sector in Singapore
https://www.flandersinvestmentandtrade.com/export/sites/trade/files/market_studies/BakeryProductsSingapore.pdf

¹⁰⁹ Euromonitor International: Packaged Food, 2020.

Figure 5-61: Distribution channel overview of baked goods in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

5.14.6 Challenges for EU products

European exporters need to be aware that the market is increasingly dominated by artisanal producers and retailers. Furthermore, they will have to compete with many, often potentially cheaper exporters from the Asian region. With these competitors already offering many options to Singaporeans, products need to be competitive in prices, quality, freshness and flavour to have a chance on the market. European exporters should think about if they are more likely to reach the mass market or a niche in advance and adapt their products and volume accordingly.

Market Takeaway: Baked goods

Consumption: All age groups and social classes, general consumer prefers high quality, fresh and healthier products.

Competition: Main competitors are local artisanal producers, local big players, plus neighbouring countries and the US.

Distribution: Mainly in store, especially popular are artisanal bakeries.

Challenges: To compete with many artisanal bakeries and big brands in supermarkets.

Opportunities: Fresh high-quality products, innovative in flavour, healthier choices, niche products.

5.15 Biscuits and cereal bars

5.15.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ EU producers have room to grow due to the many specialised products from the EU, such as Danish cookies and French butter cookies. ▪ EU products appeal to the western expat community of Singapore. ▪ International players dominate the market and the 30 by 30 strategy does not detail any expansion of biscuit and cereal bar production. 	<ul style="list-style-type: none"> ▪ Japanese and regional producers have a sizable share of the market in Singapore that the EU does not match. ▪ EU lags behind Japan in the growing internet retailing market. ▪ Malaysia is the largest exporter and its geographic location allows it to trade biscuits cheaper than EU producers due to transit costs.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ The EUSFTA will allow for producers from the EU to enter their unique products into the Singaporean market. ▪ The rising demand for Gluten free and organic niche products give EU producers a window of opportunity. ▪ Consumption of biscuit and cereal bar products is growing in Singapore. 	<ul style="list-style-type: none"> ▪ The Singaporean government is increasingly advocating against sugar consumption which will require EU producers to undergo a shift in their products to be healthier. ▪ The population is increasingly health conscious. ▪ Regional neighbours such as Thailand and Indonesia have a growing biscuit and cereal bar production sector.

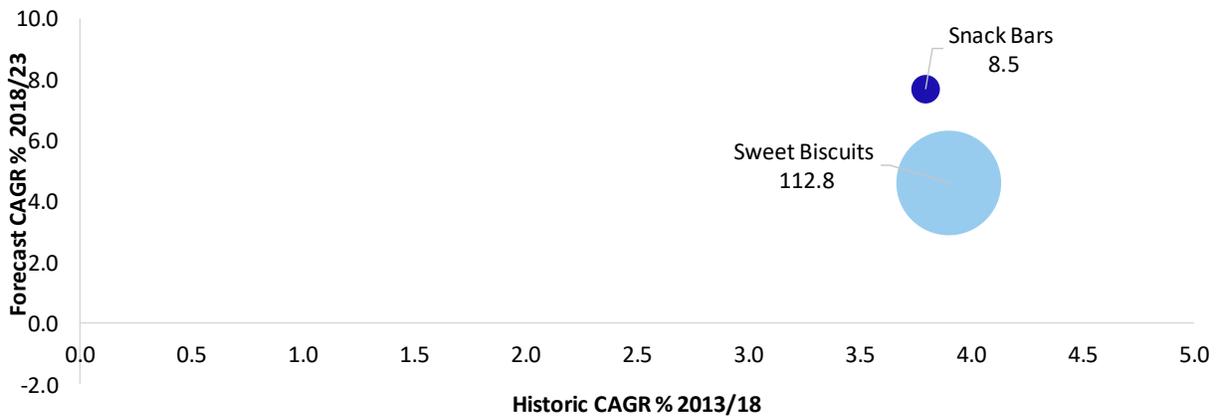
5.15.2 Consumption

5.15.2.1 Evolution of consumption

Singapore having adopted many western eating habits has readily embraced biscuit and cereal bar products. The convenience attached to the consumption of such products has allowed for steady growth in the past number of years and the demand for biscuit and cereal bar products is expected to continue rising into the forecast period.

Sweet biscuits are popular in Singapore and had a market value of 113 million in 2018, having grown at 3.9% per year over the period 2013-18. The segment is forecast to grow at 4.6% over the period 2019-2023. Snack bars although a much smaller market at 8.6 million will grow faster at 7.7% during 2019-2023 (Figure 5-62).

Figure 5-62: Evolution and forecast of the market for sweet biscuits and snack bars in Singapore, 2013-2023; EUR million



Source: Euromonitor International: Packaged Food, 2020.

5.15.2.2 Consumer profile and purchase criteria

5.15.2.3 Consumers

Consumers

Consumers of these products vary as all income classes in Singapore can readily afford these products. Much of the consumption of these products is done with the intention of alleviating temporary hunger and many consumers are drawn to the convenience of these products in a consumer base that is increasingly very busy with work and life activities.

In terms of notable consumer groups:

- The consumption of high protein products is growing and with a population that is increasingly health conscious it has allowed high protein products to appeal to consumers beyond gym-goers and bodybuilders; though these latter are the key.
- The convenience of biscuit and cereal bar products particularly appeals to adults with little time to prepare snacks or light meals from scratch.

Drivers and method of consumption

Looking at drives and method of consumption by type of good:

- **Snack Bars:** Snack bars are increasingly being consumed by Singaporeans, most notably as a health product in a country that is increasingly health conscious. The convenience of snack bars for consumers is a large driver for this particular product.
- **Wafers:** have seen the highest retail current value growth rate in this category at a rate of 4% in 2019. Wafers are typically consumed as a treat product or as a snack food item to alleviate temporary hunger.

- **Healthy biscuits and cereal bars:** Healthier alternative such as sugar free or products high a high protein content appeal to many consumers in Singapore with an increasing desire to purchase both convenience and health foods.

Generally gifting biscuits is not a common practice in Singapore, this is due to a culture of that perceives gifting as a form of bribery which is heavily punished in Singapore.

Purchase criteria

Price plays a large role in the decision making that goes into biscuit and cereal bar products due to Singapore being one of the world's most expensive countries and these products being perceived as a non-essential treat product. A large variety of these products also offers a choice to consumers and personal taste preference plays a role in purchase criteria. As noted above, convenience is also often taken into account for many products.¹¹⁰

5.15.2.4 Recent market trends

With a growing demand for convenience, as well as the rise in internet retailing in Singapore, delivery services are increasingly a growing trend. Delivery players such as Redmart offers consumers biscuit and snack products conveniently. This has also seen the rise in international products with Japanese biscuit and cereal bar products from companies like Japan Crate and Tokyo treat being an example of how internet retailing is opening up new markets to Singapore in particular in this product segment. The services of these companies operate under a subscription model and includes a bulk of Japanese products of roughly 18-20 snack pieces per delivery. Their products delivered through this method are increasingly popular in Singapore.

5.15.3 Offer

5.15.3.1 Domestic production

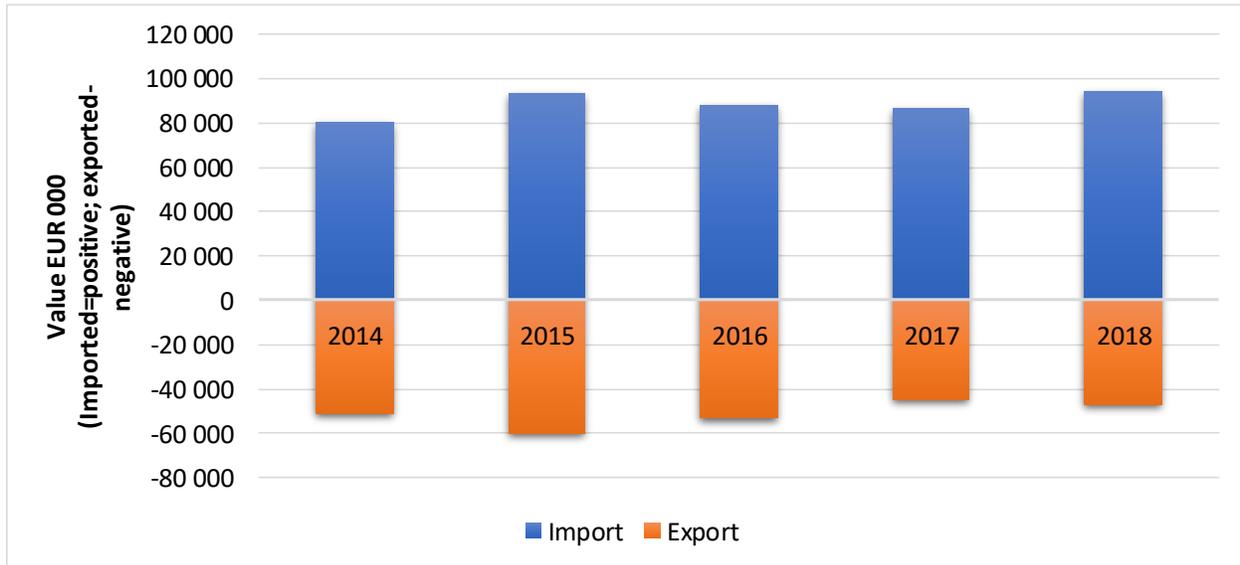
Domestic production of these products in Singapore is small, the largest local player in this market is the Khing Guan Biscuit Factory brand with a share of 20.4% of the market. Another of the larger domestic brands, Bruneus snacks owned by Superlative foods, manufactures its products in Singapore and some of these products are sold internationally. However, international players have continuously dominated this category and they are expected to maintain their positions over the foreseeable forecast period.

5.15.3.2 Imports and exports

As outlined in Figure 5-63, Singapore imports much of its biscuits due to limited domestic production. Both imports and exports have fluctuated slightly over the period 2014-18, but ultimately have been around the same levels: EUR 90m for imports and EUR 50m for exports.

¹¹⁰ Euromonitor International: Packaged Food, 2020.

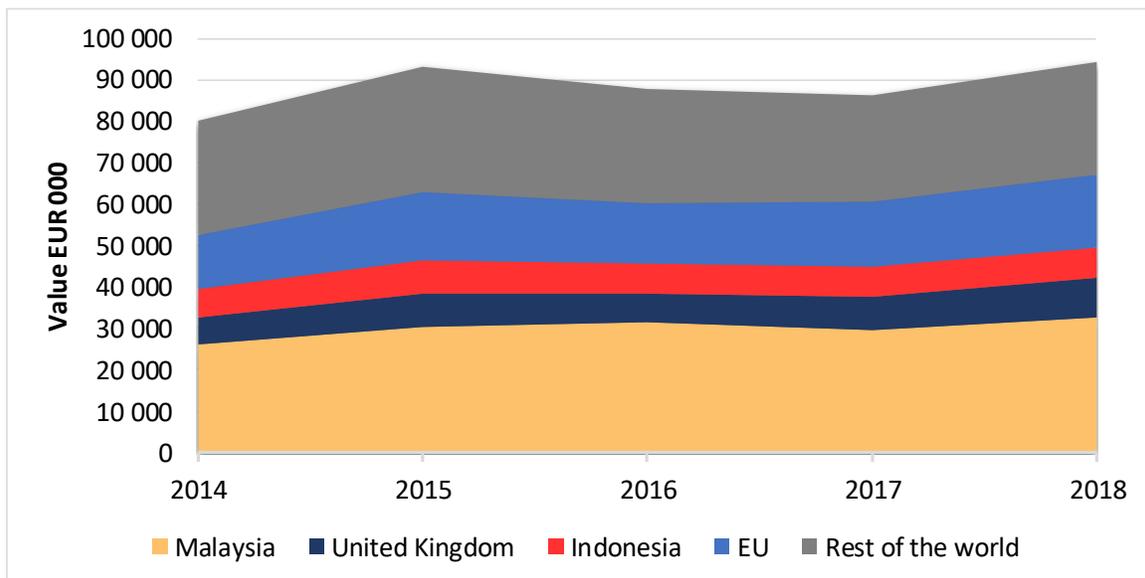
Figure 5-63: Trade balance (imports and exports) of biscuits, waffles and wafers in Singapore, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN codes 190531 and 190532.

In terms of origins, Malaysia is the key source of imports into Singapore, accounting for around 35% of all imports. The UK and Indonesia follow, accounting for just over and just under 10% respectively. The EU combined accounts for around 20% of imports (Figure 5-64).

Figure 5-64: Singaporean imports of biscuits, waffles and wafers by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN codes 190531 and 190532.

Data on trade in cereal bars unfortunately is not available as it cannot be separated from trade in other products using processed cereals such as breakfast cereals.

5.15.3.3 EU GI products

A handful of GIs which may be considered to be for biscuits (but have also been identified under baked good) were listed for protection under the EUSFTA, though not all of these have currently completed registration. GIs which have completed registration at the time of writing include:

- **Germany:** Aachener Printen, Nürnberger Lebkuchen

It is recommended to check section 9 for a full list of GIs registered under the FTA and those which were listed for protection but have not completed registration (so are currently not protected).

5.15.3.4 Main competitors

The main competition for EU producers in this market comes from nations located geographically close to Singapore that export more to Singapore than the EU does. While local production is not huge, there are also a couple of notable and popular local producers.

Companies from Japan are also establishing an internet retailing market here that is very popular and requires a variety of unique products from the EU to compete. The rise of internet retailing provides one of the areas where EU producers may gain a sizable foothold but this may be logistically challenging given the further distance to the market compared to operators in Japan and Australia.

5.15.4 Specific market entry requirements

Market Access and Entry

As set out in section 4.2, biscuits and cereal bars in Singapore falls into the category of processed foods; and as such must comply with the Sale of food act.

A licence (valid 1 year) and import permit (per shipment) are required for import, and both of these are free.

In terms of tariffs, currently European biscuit products imported into Singapore are not subject to duties.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website by entering the corresponding HS code:
e.g. <https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=SG&hscod=190531>

Customs procedures

The customs procedures for importing foodstuffs are set out in 4.2.1. As noted in this section customs account with a Unique Identity number (UEN) are required for entities engaging in the import of goods into and export of goods out of Singapore. A full list of the general requirements for export set out in Table 4-1. A list specifically for biscuits can be found on the website indicated in the box below.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website by entering the corresponding HS code:

e.g. <https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?hscod=190531&countries=SG>

Standards, SPS measures

Sanitary and Phytosanitary measures concerning the import of biscuits into Singapore are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/viewPageIFPubli.htm?doc=overview&hscod=1905&countryid=SG#h15>

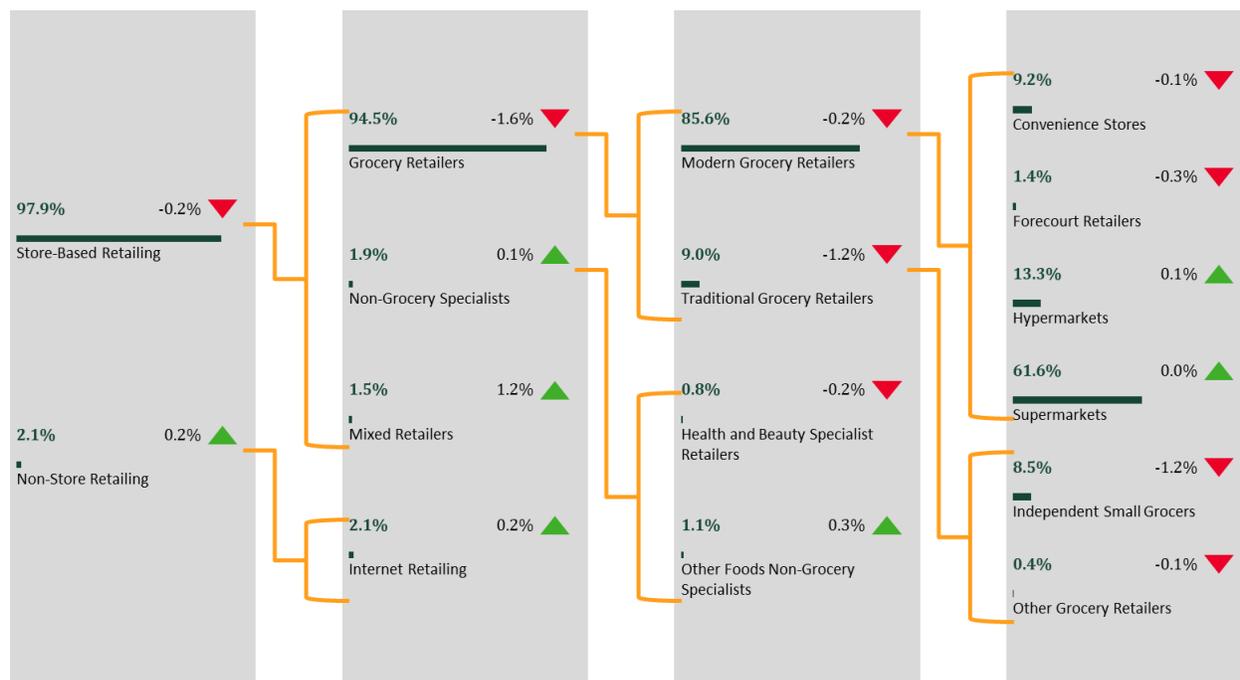
Labelling

Biscuits and cereal bars must comply with generic labelling requirements set out in the Food Regulations, which were described in section 4.2.3.

5.15.5 Distribution

Sweet biscuit distribution in Singapore mainly come from supermarket chains in the country, which hold a 61.6% share of distribution. Hypermarkets make up the second largest distributor but lags far behind at 13.3%. Internet retailing is growing slowly and today represents a 2.1% of distribution by value (Figure 5-65).

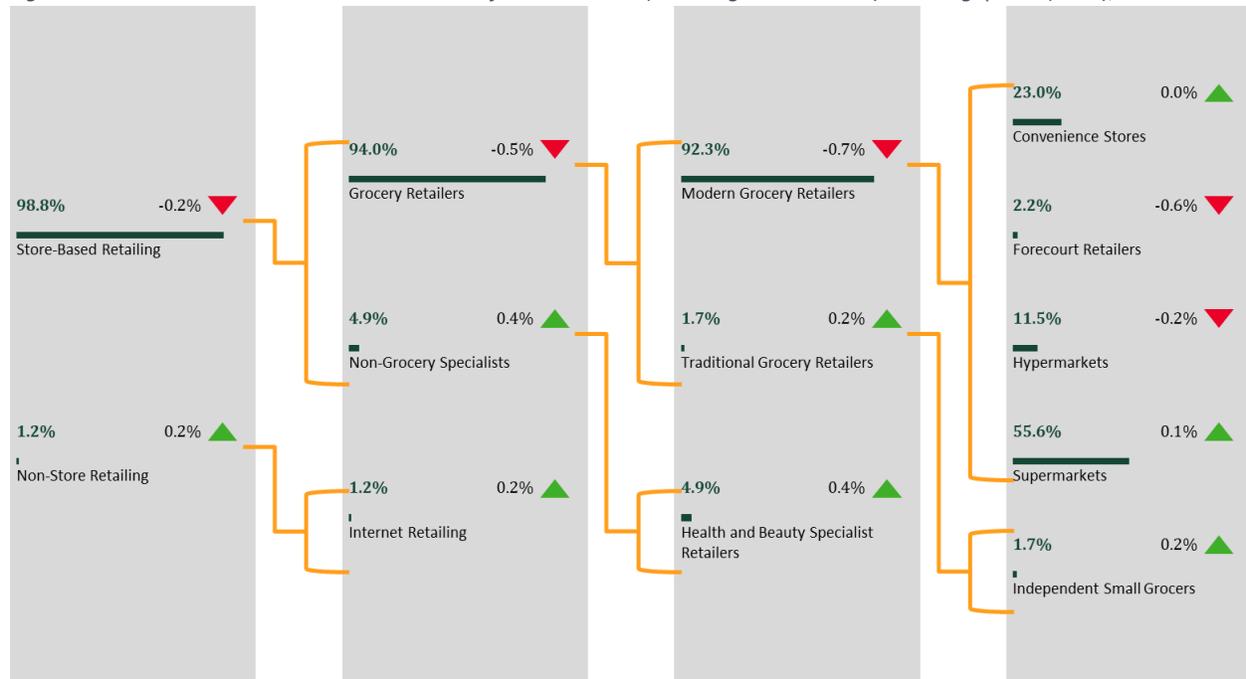
Figure 5-65: Distribution channel overview of sweet biscuits in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

Similar to sweet biscuits products, the majority of snack bar sales in Singapore come from modern grocery retailers with supermarkets accounting for 55.6% of the trade. Convenience stores perform better than under the sweet biscuit category with a total of 23 % of the snack bar distribution market, Hypermarkets make up 11% of the trade with internet retailers remaining small with a share of just 1.2%, though as noted in section 5.15.2.4 the distribution of products through the internet by certain Japanese companies is a very recent trend, so the importance of this channel may increase in coming years (Figure 5-66).

Figure 5-66: Distribution channel overview of snack bars (including cereal bars) in Singapore (2018); retail value



Source: Euromonitor International: Packaged Food, 2020.

5.15.6 Challenges for EU products

EU products face a variety of challenges in this market. In terms of competition, EU products have not penetrated the market to the same extent that products from the rest of Asia. Furthermore, while domestic production is limited, the local brands are popular. EU products, like all products in this market, also face a challenge to reduce the sugar levels of their products as the government of Singapore is actively advocating against Sugar consumption. Specialised and premium products such as Danish cookies and French Butter cookies may offer a chance of EU products to expand in niches in Singapore.

Market Takeaway: Biscuits and Cereal bars

Consumption: Consumed as a snack food to temporary alleviate hunger.

Competition: Japanese and regional producers have a sizable foothold in the Singaporean market.

Distribution: Distribution largely from supermarkets which represents over 50% for both products. Hypermarket and convenience stores also have a sizable impact.

Challenges: EU producers don't have a major share of the market in Singapore and will have to catch up to other producers.

Opportunities: The EUSFTA agreement will encourage producers in the EU to trade with Singapore.

6 Communication

6.1 Communication strategy

Companies marketing and advertising in Singapore have many different channels to consider. The aim of this section is to breakdown each section of the mass media landscape in Singapore and to introduce the main communication channels (new and traditional media, as well as fairs) available in Singapore, as well as key regulations for the advertisement of F&B.

6.1.1 Online & Digital Media

Singapore is one of the most connected countries in the world, which is one reason why it is well-suited for online and digital marketing campaigns. More than 99% of the country is covered by Long Term Evolution (LTE), which enables high-speed wireless data connection.¹¹¹ Today, it is important for companies to think about where to locate themselves in the digital market because of its wide reach in Singapore. Nearly every popular brand in Singapore is already part of this new ever-growing market with many new opportunities and a positive looking future.¹¹²

Currently, social media platforms such as YouTube, Facebook and Instagram are the most popular social media platforms in Singapore. Other popular platforms include Twitter, Pinterest and LinkedIn.

Digital advertising agencies (see box below) may provide companies with support to develop a successful digital marketing strategy.

Singaporean Main Digital Advertising Agencies:

Digital Marketing Singapore, <https://digitalm.sg/>

Jack Morton Worldwide, <http://www.jackmorton.com/offices/singapore/>

Havas Asia Pacific, <https://havasmedia.com/>

The Asia Pacific XM Advertising Agency, <https://www.mirumagency.com/en/home>

AD Cool Media, <http://ww7.adcoolmedia.com/>

Leo Burnett, <http://leoburnett.sg/>

BBDO Proximity Singapore, <https://www.proximityworld.com/>

Dentsu Singapore, <https://www.dentsuaegisnetwork.com/sg/en>

Edelman Singapore, <https://www.edelman.com/offices/singapore>

The 24 Design Studio, <https://www.24k.com.sg/>

6.1.1.1 Social media platforms

Social media marketing is very important in Singapore, considering that:

¹¹¹ Long Term Evolution (LTE) <https://www.techopedia.com/definition/8149/long-term-evolution-lte>

¹¹² The Growth and Diversity of Singapore's Digital Marketing Industry <http://yoursite.sg/index.php/industry-insights/the-growth-and-diversity-of-singapore-s-digital-marketing-industry>

- With a population of close to 6 million people, nearly 5 million of them use the internet, which shows that Singapore has one of the highest internet penetration rates in the world (over 80%, while the global average rate is around 50%).
- Different studies show that more or less 70% of Singaporeans use social media and 10% of these users say they learn about new products on social media websites.
- Around 90% of Singaporean internet users go online at least once a day.
- The average amount spent on the internet by mobile users is about 45 hours per week.
- Singapore has the highest mobile penetration rate in Asia with close to 90%.
- Even though Facebook, Instagram and Twitter are the most well-known social media platforms, it is worth to conduct a market study to find out which social media platform is best suited to reach the target audience of specific products.
- Singapore's millennials have the lead in social media.¹¹³

YouTube

More than 4 million Singaporeans use YouTube and 80% of those who use social media think it is the best social media platform for online videos. According to studies as many as 60% of users look up product related videos before they decide to buy an item. Moreover, out of the slightly older generations (35 to 60 years old) nearly 90% tend to use the platform at least once per month. In total circa 2/3 of users probably watch several videos per YouTube session, which makes YouTube a good place for online marketing.

Facebook

Facebook is very popular in Singapore, with 3.5 million active users, which accounts for a penetration rate between 80 and 90 percent of internet users. Most of them use their mobile phones to access it and a large part of users are between 25 and 34 years old. According to statistics Facebook is progressively losing its young users to other trendy and upcoming social media channels such as Snapchat or Instagram. This is why it is indeed not surprising that according to the Buffer's State Social 2018 Report a majority of 94% of businesses on Facebook invest in sponsored posts or paid ads because there definitely are very good possibilities to reach many people on this platform.

Top Facebook influencers in Singapore

[The Straits Times](#)
[Walt Disney Studios](#)
[Mothership.sg](#)
[All Singapore Stuff](#)

¹¹³6 Singapore social media stats marketers should know <https://www.techinasia.com/singapore-social-media-stats/>; What Are The Top Social Media Platforms In Singapore And Their Stats <https://mediaonemarketing.com.sg/top-social-media-platforms-singapore-stats/>; Penetration of leading social networks in Singapore as of 3rd quarter 2018 <https://www.statista.com/statistics/284466/singapore-social-network-penetration/>; Advertising in Singapore: 5 Best Social Media Platforms for Business <https://aspireapp.com/sg/blog/top-5-social-media-platforms-for-business/>

[Lianhe Wanbao](#)
[TODAY](#)
[Stomp](#)
[8world News](#)
[Lianhe Zaobao](#)
[Changi Airport](#)

Twitter

By the beginning of 2019 Twitter counted more than half a million Singaporean active users, which makes it an important channel for marketing as well. The majority of users are between 15 and 24 years old followed by 25 to 34 years old users. One way to advertise a product on Twitter is to use their premium ads. Another solution would be to hire an influencer who has many followers to promote products, as it is proven that many people tend to listen to those “celebrities”.

Top Twitter influencers in Singapore

The Seoul Story ([@theseoulstory](#))

ㅈ ([@intoblackpivk](#))

SK ([@SubjectKpop](#))

human error. ([@blxcknicotine](#))

Mothership.sg ([@MothershipSG](#))

Justin Sun ([@justinsuntron](#))

babie tae ([@taeforguk](#))

Mystarmyangel ([@mystarmyangel](#))

Instagram

More than 2/3 of internet users like to socialize and share their lives with friends and family on Instagram and thus nearly 2 million Singaporeans have an Instagram profile. Around 85% of Instagram users are between 16 and 24, however 2/3 of internet users between 55 and 65 use the platform on a regular basis as well. Advertising on Instagram is similar to options on Twitter. The best option is to hire a celebrity to promote products as it is proven that especially the younger generation trusts them more and often does not pay attention to regular ads. According to reports currently only around 10% of businesses use Instagram TV (IGTV) which makes it ideal to use.

Top Instagram influencers in Singapore

Yoyo Cao ([@yoyokulala](#))

Wendy Cheng ([@xiaxue](#))

Brad Lau ([@ladyironchef](#))

Christabel Chua ([@bellywellyjelly](#))

Leslie Tay ([@ieatishootipost](#))

Benjamin Kheng ([@benjaminkheng](#))

Daniel Ang ([@danielfooddiary](#))

Carrie Wong ([@carriewst](#))

JianHao Tan ([@thejianhaotan](#))

Bryan Choo ([@thesmartlocalsg](#))

LinkedIn

Singapore is one of the leading countries when it comes to users' connectivity on LinkedIn. The platform has around 2.3 million users who make up approximately 2/5th of the population. Most users are between 25 and 34 years old and typically have 150 connections to other LinkedIn users. Brands or products can get promoted using the following tools:

- Company Page Upgrades.
- Custom groups.
- LinkedIn Ads.
- LinkedIn Display Ads.
- Partner Messages.

Pinterest

Nearly 10% of Singaporean social media users use Pinterest. Approximately half of the users search the platform for information about products such as reviews or experience reports. The platform can be used to share pictures of products. Currently the platform is not extensively being used for marketing reasons by Singaporean businesses, hence, competition is low and there is a good chance to profit from this channel.

WhatsApp, Facebook Messenger, Skype, WeChat and LINE

Most Singaporeans use WhatsApp, followed by Facebook Messenger and a smaller share of people used WeChat, Skype and LINE. Signing up for one of those message services (especially WhatsApp Business) can help to boost business because it will be easier for customer to reach a company and faster communication can be ensured.¹¹⁴

6.1.1.2 Food blogs

An alternative interesting option to promote a product in Singapore is to work closely together with food bloggers and hire them or ask them to write a promotional post on it on their blog. Ideas given in section 6.1.1.1 are also useful with regard to food blogs. Well-known food bloggers are influencers as well and often cross over between written blogs and several social media accounts. This diversity of channels used also diversifies the exposure of a product on several platforms.

¹¹⁴ What Are The Top Social Media Platforms In Singapore And Their Stats <https://mediaonemarketing.com.sg/top-social-media-platforms-singapore-stats/>; 6 Singapore social media stats marketers should know <https://www.techinasia.com/singapore-social-media-stats/>; Social media statistics in Singapore <https://www.talkwalker.com/blog/social-media-statistics-singapore>

Top Singaporean Food Bloggers

Ladyironchef, www.ladyironchef.com/
 EatBook, <https://eatbook.sg/>
 Daniel Food Diary, <https://danielfooddiary.com/>
 Sparklette, <http://sparklette.net/>
 Delishar, <http://delishar.com/>
 Sg Food on Foot, www.sgfoodonfoot.com/
 Rubbish Eat Rubbish Grow, <https://rubbisheatrubbishgrow.com/>
 Camemberu, www.camemberu.com/
 I Eat, I Shoot, I Post, <http://ieatishootipost.sg/>
 The Ranting Panda, <https://therantingpanda.com/>¹¹⁵

6.1.2 Traditional Media

Traditional medias role in Singaporean lives decreases due to the increasing digitalization and excessive internet use of citizens. This does not mean that traditional marketing does not exist anymore. It rather is an evolution and adaption to the digital age. Printed newspapers are replaced with their online versions, radio has to compete with online music offers like Spotify and television competes with online channels like Netflix. Using digital media, either from mobile phones, tablets or computers, has become the norm.¹¹⁶

Penetration of traditional media in Singapore is set out below:

- Television: According to a survey in 2018, 4/5th of the Singaporean population watches free-to-air TV weekly. The Chinese language Channel 8 is maintaining the highest weekly reach, followed by the English language Channel 5 and Channel News Asia. Thus, the watching TV stays a popular leisure activity. However, especially young Singaporeans increasingly switch to watching series and movies online. Due to its remaining wide reach Television could be considered as a tool for marketing objectives.¹¹⁷
- Print media: The press in Singapore is over 150 years old. In the beginning of this century, it published newspapers in all of their four official languages, however most newspapers are in English or Chinese language. Less than 1/10 are written in Malay or Tamil.¹¹⁸ According to the Nielsen survey, digital consumption increasingly gains importance. The Straits Times is the most

¹¹⁵ The Absolute Best Food Blogs In Singapore In 2019 <https://www.bestinsingapore.co/best-food-bloggers-singapore/>

¹¹⁶ Traditional Marketing Is Dead in Singapore (A Eulogy by Those Who Espouse Its Digital Replacement) <https://www.constructdigital.com/insight/traditional-marketing-is-dead-in-singapore-a-eulogy-by-those-who-espouse-its-digital-replacement>

¹¹⁷ TV and Internet the highest consumed media platforms in Singapore: Nielsen survey <https://www.channelnewsasia.com/news/business/tv-internet-most-popular-media-platforms-singapore-nielsen-10905554>

¹¹⁸ Singapore <http://www.pressreference.com/Sa-Sw/Singapore.html>

popular English written newspaper and approximately has a readership (print and digital) about 30%. The readership is split in half: ½ using the print version, while the rest reads the newspaper online. Yet, the percentage of online readers is growing very fast and will soon exceed the amount of readers of the print version. Other English daily published newspapers include Today, The New Paper and The Business Times.¹¹⁹

- Radio: Radio penetration in Singapore is changing as well. Mediacorp is the most popular radio network in the country. Eight out of the ten most popular radio channels belong to the company. In general, approximately 4/5th of adults listen to Mediacorp radio stations weekly. The three most popular stations are YES, LOVE and CLASS 95, each having a weekly leadership around 15% to 20%. CLASS 95 is the leading English-speaking station, while the first two are Chinese language stations. YES 933 is the favourite station of Singaporean millennials and 987 is most popular among Generation Z. However, as it is the case for other media as well, the landscape is changing, and a growing amount of people listen to radio stations online (especially the younger generations). Three of four online listeners listen to a Mediacorp station and numbers are rising. Between October 2018 and May 2019, the number of online users grew about 10%.¹²⁰

6.1.3 Fairs and exhibitions

In addition to the digital approach, some companies decide to advertise their products on various trade fairs. Trade fairs are numerous and cover a broad range of sectors and are generally becoming a more attractive and sophisticated method for product promotion and industry networking. Due to its good location, many fairs in Singapore are international ones covering Asia as a whole.

There are a number of Common venues that host trade fairs in the country, but the most well-known ones are Singapore EXPO, MAX Atria and FHA Food & Beverage.¹²¹

A list of different upcoming fairs can be found online on websites such as:

- <https://10times.com/singapore/tradeshows>
- <https://www.tradefairdates.com/Singapore-X526-S1-Fairs-Singapore.html>

¹¹⁹ Digital news consumption in Singapore on the rise; The Straits Times remains most-read English paper: Nielsen survey <https://www.straitstimes.com/singapore/digital-news-consumption-in-singapore-on-the-rise-the-straits-times-remains-most-read>; Digital news report Singapore <http://www.digitalnewsreport.org/survey/2019/singapore-2019/>

¹²⁰ Mediacorp continues to be best radio network in Singapore: Nielsen Survey <https://www.channelnewsasia.com/news/singapore/mediacorp-best-radio-network-in-singapore-nielsen-survey-11634554>; Singaporeans listening to more digital radio, says Nielsen survey <https://www.mumbrella.asia/2019/06/singaporeans-gravitating-towards-digital-radio-and-spending-more-time-on-the-medium-says-nielsen-survey>

¹²¹ About us <https://singaporeexpo.com.sg/about>

6.2 Advertising regulations

Advertisement is regulated through the Singapore Code of Advertising Practice (SCAP). This attempt to higher the ethical standard of advertisements in Singapore through industry self-regulation. In general ads need to be legal, decent, honest and truthful.¹²² However, the SCAP is not legally binding. This does not mean there are no rules to follow. Those rules are indirectly set by what the consumer wants and accepts. If companies do not value the standard of the SCAP a complaint can be filed and if necessary, the name and kind of violation by a company will get published as a punishment.

- Advertisement should not attack or disgrace other products (non-denigration).
- It is forbidden to tell lies about other products (non-exploitation).
- Ads should not be too similar to other companies' ads when it comes to parts such as layout or text phrases used (non-imitation).
- Sponsored messages must be separated from normal content and personal opinions.
- All commercial relations need to be disclosed and those disclosers must be placed where consumers can easily see them.
- All fees that are to be charged should to be clear from the start.
- When social media channels are used, advertisers are expected not to use any services that would increase their popularity (e.g. likes).
- Ads should not contain racist, sexist, violent or pornographic content, especially not in ads for kids.
- It is prohibited for marketers to distribute personal information of children without an agreement of their guardians.
- Influencers need to tell if they get paid for a product they are presenting or not, which enables customers to decide if a product was honestly advertised or not.
- It is allowed to use a competitor's name in own ads to compare products (comparative advertising).

Main complaints that reach the Advertisement Standards Authority in Singapore (ASAS) are usually about misleading beauty products and about the restaurant sector. In general, ASAS receives more than 200 cases of feedback and complaints per year.¹²³

¹²²Singapore Code of Advertising Practice <https://asas.org.sg/code>

¹²³ Advertising and promoting your business: What's legal? <https://learn.asialawnetwork.com/2019/08/15/advertising-and-promoting-your-business-whats-legal/>; All You Need To Know About Advertising In Singapore <https://mediaonemarketing.com.sg/need-know-advertising-singapore/>

7 Singaporean Etiquette

7.1 Quick facts

Typically the naming format in Singapore will follow this convention depending on the ethnic group in question:

- **Chinese:** Family Name, First Name.
- **Malay:** First Name, Bin (Son of) or Binti (Daughter or), fathers first name.
- **Indian:** First Name, (Son of or Daughter of), fathers first name.
- **English version:** Certain Singaporeans may just use an anglicised version of their name in which case the first name then surname format applies.

It is important to note that due to the large variety of ethnic groups in Singapore what is perceived as proper etiquette will often depend on the individuals you are dealing with and their background. What offends someone from the Malay population may not offend someone from the Chinese population. However, generally in Singapore:¹²⁴

- It is expected that the elderly are to be treated with the upmost respect as is common in Asian countries, in business meetings the elderly will have a lot of influence over younger members present.
- Punctuality is essential in Singapore. Arriving at a meeting after a pre-arrange time will be perceived as a lack of respect for the person who is waiting.
- Spitting or littering is publicly frowned upon, you will receive looks of disgust and even possibly a verbal warning from a member of the public who witnesses you conduct these acts. As noted in section 3.3.2.6, the chewing of gum is prohibited, as is eating food on public transport.
- Public displays of affection in public is generally considered to be inappropriate.
- Never touch a person's head. The head is considered sacred to a large segment of the Singaporean population.
- When conducting meetings take into account the ethnicity of the individual you want to meet, for example arrange a meeting on a different day than Friday for Malay who are generally Muslim and do not bring pork to a meeting that involves Malay or Indian individuals who generally cannot eat it for religious reasons.

¹²⁴ <https://singapore.um.dk/en/the-trade-council/menu-4/>; <https://www.tripsavvy.com/doing-business-singapore-4071066>

7.2 Key DOs and DON'Ts

Dos	Don'ts
<ul style="list-style-type: none"> • Make an effort to keep discussions harmonious and balance. • When receiving a business card, take it with both hands and do not do anything to damage the card as this will be viewed as highly disrespectful. • Keep in mind in Singapore that keeping face is very important to Singaporeans, engaging in actions that cause a Singaporean to lose face is highly disrespectful and will tarnish your reputation. • Having your business card in both English and Mandarin is a norm in Singapore and will be appreciated even if the recipient speaks perfect English. • Typical Singaporean listening etiquette indicates that you count to ten before responding. This is done to demonstrate that you have given careful consideration to the other person. • Respect the laws and norms of Singapore, the population is very proud of the country and expect foreigners to comply with the cultural norms of Singapore and respect the country. 	<ul style="list-style-type: none"> • Feet are considered unclean, its best that you do not touch or move anything with your feet. • Raising your voice will be perceived as an expression of anger regardless of context, Singaporeans speak in a lower tone. • Complimenting Singaporean based on their appearance is typically perceived to be insincere. • The left hand is considered unclean amongst Singapore's Muslim and Hindu population, to be safe in general just use your right hand to shake hands and eat food. • Avoid publicly debating or disagreeing with an elder person, this will only cause them to lose face and you to lose the respect of others. • Do not criticise the government or policies of Singapore. The government has a lot of influence over the lives of Singaporeans and criticism from foreigners will generally not be tolerated by Singaporeans who have great respect for the government and pride in Singapore's independence.

8 Directory of Trade Support Projects, Organisations, and Service Providers

There are a variety of services available, both within the EU and in Singapore, for producers wishing to export to Singapore. These service providers include EU funded projects, services provided by the Member States and their embassies, other organizations and service providers, as well as buyers, importers, and distributors.

- Section 8.1 contains the project profiles for EU funded initiatives operating in Singapore.
- Section 8.2 contains the contact information for Member State embassies within Singapore
- Section 8.3 contains a listing of service providers including some information on the services available.
- Section 8.4 provides a calendar of exhibitions, trade shows, and other events to be held in Singapore in 2020.
- Section 8.5 contains a database of professionals' contacts (buyers, importers, and distributors).

8.1 European Union Organisations

Certain EU funded, or co-funded, projects within Singapore offer a range of business enabling 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.



Enterprise Europe Network Singapore Centre

The Enterprise Europe Network in Singapore was established in 2008 and has partnered with over 600 organizations located in 52 countries. It serves as a contact point for providing information and support to SMEs in the fields of international business cooperation, innovation, knowledge, and technology transfer. The EEN's core objective is to facilitate business development between European companies and companies in the USA, Japan, China and now Singapore.

Contacts

 12985 Jalan Bukit Merah, SMF Building, 159457, Singapore

 (+65) 6826 3000

 <http://www.een-singapore.sg/>



European Chamber of Commerce in Singapore

Established in 2001, EuroCham's mission is to represent the business interests of its European members in Singapore, and to improve the business environment in Singapore for the benefit of all businesses. It is currently composed of European National Business Groups as well as direct corporate members.

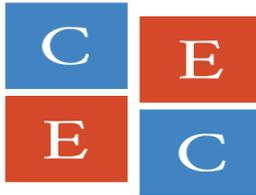
Contacts

 138 Robinson Road, #11-04 Oxley Tower 068906 Singapore

 (+65) 6836 6681

 info@eurocham.org.sg

 <https://eurocham.org.sg/>



Central and Eastern European Chamber of Commerce in Singapore (CEEC)

CEEC is an independent non-profit organisation, which supports CEE companies which are already active in Singapore and advise new entrants on the challenges in this market. The Chamber represents companies from 15 countries (Austria, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, North Macedonia, Montenegro, Poland, Romania, Serbia, Slovak Republic, and Slovenia).

Contacts

 138 Robinson Road, # 11-04 Oxley Tower, Singapore

 (+65) 6836 6681

 hello@ceec.org.sg

 <https://ceec.org.sg/>

8.2 Directory of EU Member State Embassies/Consulates

EU MS	Address	Contact information
Austria (Embassy)	600 North Bridge Road #24-04/05 Parkview Square, Singapore 188778 Singapore	☎ (+65) 6396 6350 ✉ singapur-ob@bmeia.gv.at 🌐 http://www.bmeia.gv.at/oeb-singapur/
Belgium (Embassy)	AXA Tower. 8 Shenton Way #14-01, 068811 Singapore	☎ (+65) 6220 7677 ✉ Singapore@diplobel.fed.be
Bulgaria (Embassy in Indonesia is responsible for Singapore)	34-36, Jalan Imam Bonjol 10310 Jakarta Indonesia	☎ (+62) 23-390-4049 ✉ Embassy.Jakarta@mfa.bg 🌐 www.mfa.bg/embassies/indonesia
Croatia (Embassy in Indonesia is responsible for Singapore)	Menara Mulia-Suite 2801, Jl. Gatot Subroto Kav. 9-11 12930 Jakarta Indonesia	☎ (+62) 21 525 7822 ✉ embassy@croatemb.or.id 🌐 http://www.croatemb.or.id
Cyprus (Honorary Consulate)	9 Raffles Place, Level 32 Republic Plaza Singapore 048619	☎ (+65) 92 47 2109 ✉ Cyprus.singapore@gmail.com
Czech Republic (Honorary Consulate)	1 Temasek Avenue #41-00 Millenia Tower Singapore 039192	☎ (+65) 6434 9825 ✉ singapore@honorary.mzv.cz
Denmark (Embassy)	101 Thomson Road, #13-01/02 United Square, Singapore	☎ (+65) 6355 5010 ✉ sinamb@um.dk 🌐 www.singapore.um.dk
Estonia (Honorary Consulate)	1A International Business Park #13-01 Singapore 609933	☎ (+65) 6387 7777 ✉ sonny@estonia-consul.org
Finland (Embassy)	101 Thomson Road, # 21-03 United Square	☎ +65 625 440 42 ✉ Sanomat.SIN@formin.fi
France (Embassy)	101-103 Cluny Park Road Singapore 259595	☎ (+65) 68 80 78 00 🌐 sg.ambafrance.org
Germany (Embassy)	50 Raffles Place #12-00 Singapore Land, Singapore 048623	☎ (+65) 65336002
Greece (Embassy)	Goldbell Towers, 47 Scots Rd. 228233 Singapore	☎ (+65) 67323011 ✉ gremb.sg@mfa.gr 🌐 www.mfa.gr/missionsabroad/en/singapore

EU MS	Address	Contact information
Hungary <i>(Embassy)</i>	250 N Bridge Rd, #29-01/A, Raffles City Tower, 179101 Singapore	☎ (+65) 6883 0882 ✉ mission.sin@mfa.gov.hu 💻 szingapur.mfa.gov.hu
Ireland <i>(Embassy)</i>	541 Orchard Rd, Liat Towers, 8 th Floor, 238881 Singapore	☎ (+65) 262387616 💻 www.dfa.ie/irish-embassy/singapore/
Italy <i>(Embassy)</i>	101, Thomson Rd, Int.27-02 United Square, 307591 Singapore	☎ (+65) 62506022 ✉ ambasciata.singapore@esteri.it 💻 www.amsingapore.esteri.it
Latvia <i>(Honorary Consulate)</i>	19 Cecil Street, The Quadrant, 049704 Singapore	☎ (+65) 62365174 ✉ ino@consul-latvia.sg 💻 www.consul-latvia.sg
Lithuania <i>(Honorary Consulate)</i>	3 Philip Street Singapore 048693 Singapore	☎ (+65) 6221 1755 ✉ lithuania@tembusupartners.com
Luxembourg <i>(Honorary Consulate)</i>	9 Oxley Rise, The Oxley, 238697, Singapore	☎ (+65) 68300162 ✉ lu.sg@gmail.com
Malta <i>(Honorary Consulate)</i>	10 Anson Rd, International Plaza. 079903 Singapore	☎ (+65) 6324 2060 ✉ Malta@sinoda.com.sg
The Netherlands <i>(Embassy)</i>	541 Orchard Towers. Liat Towers, 238881 Singapore	☎ (+65) 67371155 ✉ sin@minbuza.nl 💻 ww.nederlandwereldwijd.nl/landen/Singapore
Poland <i>(Embassy)</i>	435 Orchard Rd. Wisma Atria Office Tower 238877 Singapore	☎ +65 62359478 💻 singapur.msz.gov.pl/
Portugal <i>(Embassy)</i>	3 Killiney Rd, Winsland House, 239519 Singapore	☎ (+65) 62242256 ✉ singapura@men.pt 💻 www.singapura.embaixadaportugal.mne.pt/
Romania <i>(Embassy)</i>	Kings Centre, Havelock Rd, 169662 Singapore	☎ (+65) 67355023 ✉ Singapore@mae.ro 💻 www.Singapore.mae.ro
Slovakia <i>(Honorary Consulate)</i>	200 Cantonment Rd, 089736 Singapore	☎ (+65) 62366111 ✉ Mosecretary@stamfordland.sk
Slovenia <i>(Honorary Consulate)</i>	101 Cecil Street Tong Eng Building, 069533	☎ (+65) 6 221 8328 ✉ gerald.lim@sloveniaconsul.si
Spain <i>(Embassy)</i>	7 Temasek Boulevard, 038987, Singapore	☎ (+65) 67259220 ✉ emb.singapur@maec.es

EU MS	Address	Contact information
		 www.exteriores.gob.es/embajadas/singapore
Sweden <i>(Embassy)</i>	1 Temasek Avenue 039192, Singapore	 (+65)- 64159720  ambassaden.singapore@gov.se  www.swedenabroad.se/embassies/singapore

8.3 Other organisations and service providers

Service provider	Address	Contact information
SERVICES FOR AUSTRIAN COMPANIES		
Advantage Austria in Singapore	600 North Bridge Rd, #24-04/05 188778 Singapore	+65 6396 6350 Singapore@advantageaustria.org www.advantageaustria.org/sg
SERVICES FOR BELGIAN COMPANIES		
Belgium-Luxembourg Business Group	4 Battery Road, Bank of China Building #25-01 049908 Singapore	(+84) 28 38 224 029 secretary@blbg.org.sg https://blbg.org.sg/
Flanders Investment & Trade	Embassy of Belgium, 8 Shenton Way 14-01 AXA Tower 068811 Singapore	(+65) 62 27 39 97 singapore@fitagency.com https://www.flandersinvestmentandtrade.com/en/contact/foreign-offices/singapore
Wallonia Export & Investment	51 Goldhill Plaza #21- 11/12 308900 Singapore	(+65) 62 51 00 79 Singapore@brusselsinvestexport.com http://singapore.invest-export.brussels/fr/about-us
SERVICES FOR BULGARIAN COMPANIES		
Bulgarian Chamber of Commerce & Industry	17, Adriana Budevsk Str. Sofia 1463, Bulgaria	(+359 2) 8117 400; 987 26 31 bccci@bccci.bg
SERVICES FOR CROATIAN COMPANIES		
Croatian Chamber of Economy	Rooseveltovo trg 2, 10000 Zagreb, Croatia	investicije@hgk.hr; hgk@hgk.hr www.investincroatia.hr
SERVICES FOR CZECH COMPANIES		
Czech Chamber of Commerce	Florentinum, Na Florenci 2116/15, 110 00 Praha 1	+420 266 721 300 office@komora.cz komora.cz
SERVICES FOR CYPRIOT COMPANIES		
Cyprus Chamber of Commerce and Industry	38, Grivas Dhigenis Ave. & 3, Deligiorgis Str., P.O.Box 21455, 1509 Nicosia	+357 22889800 chamber@ccci.org.cy
SERVICES FOR DANISH COMPANIES		
Danish Chamber of Commerce	Dansk Erhverv, Børsen, DK-1217 Copenhagen K	+61 8 9848 2065 info@danskerhverv.dk www.danskerhverv.dk
SERVICES FOR DUTCH COMPANIES		

Service provider	Address	Contact information
ADB- DutchCham (Singapore)	The Embassy of the Netherlands, 541 Orchard Rd, Liat Towers 238881 Singapore	 (+65) 653 677 50  info@DB-DUCTHCHAM.SG  https://adb-dutchcham.sg/
SERVICES FOR ESTONIAN COMPANIES		
Estonian Chamber of Commerce & Industry	Toom-Kooli 17, 10130 Tallinn	 +372 604 0060  koda@koda.ee
SERVICES FOR FINNISH COMPANIES		
Finnish Business Council in Singapore	The Embassy of Finland, 1010 Thomson Rd, 307591 Singapore	 (+65) 8110 8010  fbcsg@fbcsg.org  http://www.fbcsg.org/
SERVICES FOR FRENCH COMPANIES		
France – Singapore chamber of commerce	L541 Orchard Rd # 09-01 Liat Towers 23881 Singapore	 (+65) 69331350  https://www.fccsingapore.com/
SERVICES FOR GERMAN COMPANIES		
Singaporean – German chamber of Industry and commerce	25 International Business Park 05-105 German centre 609916 Singapore	 (+65) 6433 5330  info@sgc.org.sg  www.sgc.org.sg
SERVICES FOR GREEK COMPANIES		
Enterprise Greece – Invest & Trade	109 Vasilissis Sophia's Avenue, 115 21 Athens, Greece	 +30 210 335 5700  info@enterprisegreece.gov.gr
SERVICES FOR HUNGARIAN COMPANIES		
Hungarian Export Promotion Agency	1095 Budapest, Ipar utca 5	 06 1 810 1600  info@hepa.hu  hepa.hu
SERVICES FOR IRISH COMPANIES		
Irish chamber of commerce in Singapore	Ireland House, 541 Orchard Rd #08-01 Liat Towers, Singapore 238881	 +65 62358897  https://www.irishchamber.com.sg/contact
SERVICES FOR ITALIAN COMPANIES		
Italian Chamber of commerce in Singapore	160 Robinson Rd SBF Center #20-05 068914 Singapore	 (+65) 62230356  http://www.italchamber.org.sg/
SERVICES FOR LATVIAN COMPANIES		
Latvian Chamber of commerce and industry	35 Krisjana Valdemara str., Riga, LV-1010, Latvia	 +371 67225592  info@chamber.lv
SERVICES FOR LITHUANIAN COMPANIES		
Lithuanian Chamber of commerce and industry	Vašingtono sq. 1-63a, LT-01108 Vilnius	 (370) 2613 102

Service provider	Address	Contact information
		✉ info@chambers.lt 🌐 https://chambers.lt/en/
SERVICES FOR LUXEMBURG COMPANIES		
Belgium-Luxembourg Business Group	Battery Road, Bank of China Building #25-01 049908 Singapore	☎ (+84) 28 38 224 029 ✉ secretary@blbg.org.sg 🌐 https://blbg.org.sg/
SERVICES FOR MALTESE COMPANIES		
The Malta Chamber of Commerce, Enterprise and Industry	64, Republic Street, Valletta, Malta	<i>Not available</i>
SERVICES FOR POLISH COMPANIES		
Polish chamber of commerce	00-074 Warsaw, Trebacka 4	☎ ✉ kig@kig.pl 🌐 https://kig.pl/
SERVICES FOR PORTUGUESE COMPANIES		
Portuguese Business Society of Singapore	Raffles Place, Singapore	🌐 https://www.pbs.org.sg/
SERVICES FOR ROMANIAN COMPANIES		
Chamber of Commerce and Industry of Romania	Address: 2, Octavian Goga Blvd, sector 3, 030982 Bucharest	☎ +40 21 3117534 ✉ narcis.pirnaeu@ccir.ro 🌐 www.ccir.ro
SERVICES FOR SLOVAK COMPANIES		
Slovak Chamber of Commerce & Industry	Gorkého 9, 81603 Bratislava, Slovakia	☎ +421 2 54433272
SERVICES FOR SLOVENIAN COMPANIES		
Chamber of Commerce and Industry of Slovenia	Dimičeva 13, SI-1504 Ljubljana	☎ +386 1 5898 000 ✉ info@gzs.si
SERVICES FOR SPANISH COMPANIES		
Spanish Chamber of Commerce	C/ Ribera de Loira, 12 - 28042 Madrid	☎ (+34) 91 590 69 00 🌐 https://www.camara.es/en
SERVICES FOR SWEDISH COMPANIES		
Sweden Chamber of Commerce	Brunnsgatan 2, 111 38 Stockholm, Sweden	☎ (+46) 8 555 100 00 🌐 https://www.chamber.se/

8.4 Calendar of trade events and exhibitions in 2020

Note: the ongoing issues with coronavirus at the time of writing both resulted in various cancellations/delays without fixed rescheduling dates and may result in further changes to the calendar outlined below. In view of this:

- Scheduled fairs which did not take place have been included with their original date, as it is generally not clear when they will be rescheduled for, and most events are anyhow recurring. It is recommended that the links provided be monitored for news on when the event or the next edition is being scheduled for.**
- It is strongly recommended to monitor the links provided for any future events to check whether they are still going ahead, and if not whether a new date has been decided.**

Event	Date	Recurrence	Venue	Organiser Details
MARCH 2020				
Global Grain Asia	09-11 Cancelled no new date	Annual Location Rotation	Grand Copthorne Waterfront	+44 (0) 20 7770 7222 registration@ggrain.com http://www.globalgrainevents.com/asia/details.html
Food & Beverage Fair	19-22	Annual	Singapore Expo Hall 5	+65-63193373 sales@singaporefoodshows.com.sg http://singaporefoodshows.com.sg/food-and-beverage-fair/
Sustainable foods summit	30-31 Current reschedule: 7-8 Sept 2020	Annual Location Rotation	Marina Madarin	+65-96395390 info@sustainablefoodssummit.com https://sustainablefoodssummit.com/asia/
FHA Food and Beverages	31-3 Current reschedule: 2-5 March 2021	Biennial	Singapore Expo	enquiry@foodnhotelasia.com https://www.fhafnb.com/
ProWine Asia	31-3 Current reschedule: 2-5 March 2021	Biennial	Singapore Expo 9 Aviation Rd, 498760 Singapore	(+65) 63329642 Bearthrice@mda.com.sg https://singapore.prowineasia.com
APRIL 2020				
PetExpo Singapore	17-19 Expected end 2020	Annual	Singapore Expo Hall 7, 9 Aviation	+65-6389-6633 hello@petexposg.com https://petexposg.com/

Event	Date	Recurrence	Venue	Organiser Details
			Rd, 498760 Singapore	
MAY 2020				
HealthFiesta	1-3 Currently rescheduled for 21-23 August	Annual	Suntec Singapore Convention & Exhibition Centre	+65-9762-2027 kelenkoh@sph.com.sg https://healthfiesta.sg/
TFWA Asia Pacific Exhibition & Conference	10-14 Cancelled no new date	Annual Location Rotation	Mariana Bays Sands	Contact through website https://www.tfw.com/tfw-asia-pacific-exhibition-conference
JUNE 2020				
World Aquaculture Society 2020	8-12 Currently rescheduled for December	Annual Location Rotation	Singapore Expo Convention & Exhibition Center	https://www.was.org/meeting/code/WA2020#lgx-travelinfo
Sprout 2020	13-14	Annual	Suntec Singapore Convention & Exhibition Centre	contact through website https://www.visitsprout.sg/home
Yummy Foods Expo	25-28 Currently rescheduled for 29 Oct-1 Nov 2020	Annual	Singapore Expo 9 Aviation Rd, 498760 Singapore	+65 6319 3373 sales@singaporefoodshows.com.sg http://singaporefoodshows.com.sg/yummy-food-expo/
JULY 2020				
Singapore Gifts & Premiums fair 2020	15-17 Currently rescheduled for September	Annual	Mariana Bay Sands	Contact through website https://sgpfair.com/index.php
Singapore Food Festival	17-24 Date still provisional / estimated	Annual	Across Singapore	(65) 6736 6622 enterpriseone@spring.gov.sg https://www.carnifest.com/singapore-food-festival-sff-2020/
AUGUST 2020				
B2B Marketing Leaders forum Asia	19-20 Currently rescheduled	Annual	Parkroyal	+61 436 012 978 sales@singaporefoodshows.com.sg

Event	Date	Recurrence	Venue	Organiser Details
	for 7-8 Oct 2020			 https://b2bmarketingleaders.com.au/singapore/
SEPTEMBER 2020				
World Food Fair 2020	17-20	Annual Location Rotation	Singapore Expo Hall 5	 (65) 63193373  sales@singaporefoodshows.com.sg  https://singaporefoodshows.com.sg/world-food-fair-2/
Speciality & fine food Asia	29-01	Annual	Suntec Singapore Convention &Exhibition Centre	 +65 9683 1880  Ariel@montgomeryasia.com  https://www.speciality-asia.com/
OCTOBER 2020				
Food Japan 2020 – 9th ASEAN exhibition of Oishii Japanese food and beverage	22-24	Annual	Suntec Singapore Convention &Exhibition Centre	 +65 63896645  sales@oishii-japan.co.jp  https://www.jetro.go.jp/j-messe/tradefair/detail/107761
FLAsia 2020 – Franchising & Licensing in Asia	22-24	Annual	Mariana Bay Sands	 Contact through website  http://franchiselicenceasia.com/
Singapore VET Conference	23-24	Annual	Suntec Singapore Convention &Exhibition Centre	 Contact through website  https://singapore.vetshow.com/
NOVEMBER 2020				
World's leading wines	2 nd	Annual	Singapore Expo Hall 5	 +44 20 39208672  info@worldsleadingwines.com  http://worldsleadingwines.com/events_china/singapore-worlds-leading-wines/
The Tech Show	12-15	Annual	Suntec Singapore Convention &Exhibition Centre	 contact through website  https://thetechshow.com.sg/

8.5 Database of professionals' contacts

List of relevant buyers, importers and distributors

Company name	Type	Area of interest	Contact information
6DM	Import/Distribution	Beer	☎ (+65) 6766 6887 ✉ marketing@6dm.sg 🌐 https://www.6dm.sg/
AA French Wine Pte Ltd.	Import/ Distribution	Wine (French)	☎ (+65) 9159 5679 ✉ sales@frenchwine.com.sg 🌐 http://www.frenchwine.com.sg/
A-Linkz Marketing Pts Ltd	Import/ Distribution	F&B	☎ +65 63271813 ✉ alinkz@singnet.com.sg 🌐 http://www.alinkzmarketing.com/
All Big Frozen Food Pte Ltd	Import/ Distribution	Primarily sea food	☎ (+65) 66942300 ✉ sales@allbig.com 🌐 http://www.allbig.com.sg/
Amax Foods Pte Ltd	Import/ Distribution	Meat	☎ (+65) 9817 9371 ✉ joe@amaxfoods.com
Ampelia Wines	Import/ Distribution	Wine	☎ (+65) 93881436 ✉ ian@ampelia.com.sg 🌐 https://www.ampelia.sg/
Angliss	Distribution	F&B (various)	☎ (+65) 67788787 ✉ corporatesales@angliss.com.sg 🌐 http://www.angliss.com.sg/
Angra Wine and spirits	Import/ Distribution	Wine, spirits	☎ (+65) 6532 7791 ✉ info@angra.com.sg 🌐 http://www.angra.com.sg/
Arla Foods	Import/ Distribution	Dairy	☎ (+65) 6266 4844 🌐 https://www.arla.com.sg/
Asian blending	Ingredients production / import	Various, notably dairy	☎ (+65) 6265 2288 🌐 https://asianblending.com/
Asian Food Network Pte Ltd	Import/ Distribution	F&B	☎ (+65) 6873 0018 ✉ enquiry@asianfood.network 🌐 http://asianfood.network/
Associate & United Distributors Pte Ltd	Distribution	Chocolate and confectionery (FMCG)	☎ (+65) 6289 4204 ✉ sales@aud.com.sg 🌐 https://www.aud.com.sg/

Company name	Type	Area of interest	Contact information
At Fresh Pte Ltd	Import/Distribution	Fruit and Vegetables, other	☎ (+65) 67780150 ✉ enquiry@atfresh.com.sg 🌐 https://www.atfresh.com.sg/
Beautiful wines	Import/ Distribution	Wine	☎ (+65) 63921236 ✉ info@beautifulwine.com.sg 🌐 https://www.beautifulwine.com.sg/
Benelux Flowers & Food Pte Ltd	Import/ Distribution	Fruit and Vegetables	☎ (+65) 6779 6890 🌐 https://www.beneluxproduce.com/
Boncru fine wines	Import/ Distribution	Wine	☎ (+65) 9654 3426 ✉ marco@boncrufinewines.com 🌐 https://www.boncrufinewines.com/
Candy Empire	Import/ Distribution	Chocolate and Confectionery, biscuits, other snacks	☎ (+65) 63768382 ✉ enquiries@candyempire.com.sg 🌐 https://candyempire.com.sg/
Certain Cellars	Import/ Distribution	Wine	☎ (+65) 6270 3230 ✉ wines@certaincellars.com 🌐 https://www.certaincellars.sg/
Cheese ark	Import/ Distribution	Dairy (cheese)	☎ (+65) 91750090 ✉ enquiries@thecheeseark.com 🌐 http://www.thecheeseark.com/
Cheese artisans	Import/ Distribution	Dairy (cheese)	☎ (+65) 6463 4686 ✉ info@cheeseartisans.com.sg 🌐 https://www.cheeseartisans.com.sg/
Cher Hua Enterprise Pte Ltd	Import/ Distribution	Fruit and Vegetables	☎ (+65) 6779 4473 ✉ cherhuawholesale@gmail.com
Choco Express	Import/ Distribution	Chocolate and confectionery	☎ (+65) 6289 4204 🌐 https://www.chocoexpress.com.sg/
Chuan Seng Huat	Import/ Distribution	Wine and spirits	☎ (+65) 64586857 ✉ sales@chuansenghuat.com.sg 🌐 http://chuansenghuat.com.sg/
Classic fine foods	Import/ Distribution (food service)	F&B	☎ (+65) 6501 5555 ✉ info@classic.com.sg 🌐 https://www.classicfinefoods.com/
Chye Choon Foods Private Ltd	Import/ Distribution	Pasta and Rice	☎ (+65) 62835470 ✉ enquiry@chyechoon.com.sg 🌐 http://www.chyechoon.com.sg/

Company name	Type	Area of interest	Contact information
Cold storage Supermarket	Supermarket	F&B	☎ (+65) 6891 8000 ✉ customer.service@coldstorage.com.sg 🌐 https://coldstorage.com.sg/
Cru world wine	Import/ Distribution	Wine (high-end)	☎ (+65) 6914 2678 ✉ sales@sg.cruworldwine.com 🌐 https://sg.cruworldwine.com/
Crystal Wines	Import/ Distribution	Wine	☎ (+65) 6737 3540 🌐 https://www.crystalwines.com/
CS foods	Import/Distribution	Meat	☎ (+65) 6742 7354 ✉ sales@csfoods.sg 🌐 https://csfoods.sg/
Culina Pte Ltd	Import/Wholesale	Meat and wines (high quality)	☎ (+65) 67536966 ✉ info@culina.com.sg 🌐 https://www.culina.com.sg/
Dashmesh	Import/Distribution	Dairy, limited general F&B	☎ (+65) 62729921 ✉ dspl_import@dashmesh.com.sg 🌐 http://dashmesh.com.sg/
D & D Wines	Import/ Distribution	Wine	☎ (+65) 6744 2765 ✉ julien.sauvage@ddwines.com.sg 🌐 http://www.ddwines.com.sg/
Dynamic Santino Asia	Import/ Distribution	Wine	☎ (+65) 6396 0631 ✉ valentino@dsantinoasia.com 🌐 dsantinoasia.com
Ellaziq Pte Ltd	Import/Processing/Distribution (including to food service)	Halal F&B products	☎ (+65) 6758 7530 ✉ enquiry-el@ellaziq.com 🌐 https://www.ellaziq.com/
Elite fine foods	Import/ Distribution	F&B (high end European)	☎ (+65) 6226-3269 ✉ info@elitefood.sg 🌐 https://www.elitefood.sg/
Equatorial Wines	Import/ Distribution	Wine, Spirits	☎ (+65) 8101 4995 ✉ orders@eqwines.net 🌐 https://equatorialwines.com/
Euraco Fine food	Import	F&B (Fine European)	☎ (+65) 6276 5433 🌐 https://www.euraco.com.sg/
Fairprice	Supermarket	F&B (various)	🌐 https://www.fairprice.com.sg/
Ferrari Food+Wine	Import/ Distribution	F&B (high end)	☎ (+65) 67493565 ✉ info@giorgio-ferrari.com 🌐 https://www.giorgio-ferrari.com/

Company name	Type	Area of interest	Contact information
Fnb market	e-Procurement marketplace for F&B	F&B for food service	 https://www.fnbmarket.com/
Foodtrade Pte Ltd	Import/Distribution	F&B	 (+65) 68411674  foodtrade@singnet.com.sg
Foodservices Inc Pte Ltd	Distribution/ Wholesaler	F&B (various)	 (+65) 6744 6455  https://www.foodservices.com/
Foster foods	Distribution	F&B (Gourmet)	 eat@fosterfoods.sg  https://fosterfoods.sg/
Frost Food and Beverages Ltd	Import/Distribution (mainly to retail)	Various F&B	 (+65) 6862 2166  newproducts@frosts.com.sg  https://www.frosts.com.sg/
Frozen Meat	Import/ Distribution	Meat (frozen)	 (+65) 9800 8201  frozenmeatsg@gmail.com  https://frozenmeat.sg/
G.K International Pte Ltd	Import/ Distribution	F&B	 (+65) 63721188  info@GKI.COM.SG  http://www.gki.com.sg/
Gelmax	Import/ Distribution	F&B (western style)	 (+65) 6221 5891  https://www.gelmax.com.sg/
Goh Yeow Seng Pte Ltd	Import/ Distribution	F&B	 (+65) 64421442  Maicar@gohyeowseng.com.sg
Golden Hung Ho	Import/ Distribution	Wine	 (+65) 6562 0798  marketing@ghh.com.sg  http://www.onestopliquor.com/
Ha Li Fa Pte Ltd	Food processor and supplier to food service	Meat	 (+65) 6773 6209  sales@halifa-bobo.com  https://www.halifa-bobo.com/
Hanifaa Frozen Food Pte Ltd	Import/Distribution	Meat (Halal)	 (+65) 6744 2933  info@hanifaafood.com  https://hanifaafood.com/
Hen Tick Foods Pte Ltd.	Import/ Distribution	Meat and vegetables (frozen)	 (+65) 6268 1576  htfoods@hentick.com.sg  https://hentick.com.sg/
HL Enterprise Pte Ltd	Import/Distribution	F&B	 (+65) 68527401  hlenterprise@ym  http://www.sundayshop.sg/
Hock Send Food Pte Ltd	Import/ Distribution / Brand representation	F&B	 (+65) 6595 9222  daniel@hockseng.com.sg  http://www.hosengroup.com/

Company name	Type	Area of interest	Contact information
Hoogwegt Singapore	Import/ Distribution	Dairy	☎ (+65) 69085037 🌐 https://hoogwegtsingapore.com/en
Hua Kun Food Industry Pte Ltd	Import/ Distribution	Meat (Halal)	☎ (+65) 6776 6998 ✉ sales@huakunfood.com.sg 🌐 https://www.huakunfood.com.sg/
Huay Feng Hang Pte Ltd	Distribution	Honey, Health Food.	☎ (+65) 6748 2911 ✉ sales@huiji.com.sg 🌐 http://www.huiji.com.sg/
Huber Pre Ltd	Processing/ Distribution	Meat	☎ (+65) 6774 4883 ✉ sales@hubers.com.sg, info@hubersbutchery.com.sg 🌐 http://www.hubers.com.sg/
Hupco Ptd Ltd	Importer/Wholesaler	Fruit and Vegetables	☎ (+65) 62666868 ✉ hupcohch@singnet.com.sg 🌐 http://www.hupco.com/
IMI Lifestyle Products Pt Ltd	Import/ Distribution	Health foods / supplements	☎ (+65)62726180 ✉ admin@imi.com.sg 🌐 http://www.imi.com.sg/
Infinite Supply Pte Ltd	Import/ Distribution	Wine	☎ (+65) 9818 5452 ✉ peter@infinitesupply.com.sg 🌐 http://www.infinitesupply.com.sg
Indoguna (Singapore)	Import/ Distribution	F&B (mainly meat)	☎ (+65)67550330 ✉ info@indoguna.com.sg 🌐 http://www.indoguna.com/
Italian Wine Club Pte Ltd	Import/ Distribution	Wine (Italian)	☎ (+65) 9853 5102 ✉ info@itwineclub.it 🌐 http://www.itwineclub.com
Jupiter57	Import/ Distribution	Wine, spirits, confectionery (Italian)	☎ (+65) 9137 6564 ✉ contact@jupiter-57.com 🌐 https://www.jupiter-57.com/
Kaimay Trading Pte Ltd	Import/ Distribution	F&B	☎ (+65) 64250363 ✉ Enquiry@kaimay.com.sg 🌐 http://www.kaimay.com.sg/
Kaiser Foods Singapore	Import/ Distribution	Food (frozen and chilled)	☎ (+65) 68414747 ✉ enquiries@kaiserfoods.biz 🌐 https://www.kaiserfoods.com.sg/
Kean Ann Co. Pte Ltd	Import/ Distribution	Chocolate and confectionery	☎ (+65) 6748 6736 🌐 https://www.keanann.com.sg/

Company name	Type	Area of interest	Contact information
King's Candy	Wholesaler	Confectionery (European)	☎ (+65) 62447981 ✉ admin@kingscandy.com.sg 🌐 https://kingscandy.com.sg/
KOT Selections	Import/on-trade Distribution	Wine (natural)	☎ (+65) 9789 5552 🌐 http://www.kotselections.com
Lactalis Singapore Pte. Ltd	Import/ Distribution	Dairy (France)	☎ (+65) 64846090 🌐 https://www.lactalis-international.com/
Legendary Spirits	Import/ Distribution	Wine and spirits	☎ (+65) 9858 3557 🌐 www.legendaryspirits.com.sg
Leong Guan	Import	Pasta	☎ (+65) 67547911 ✉ enquiry@leong-guan.com 🌐 https://leongguan.com/
Leong Hup Food Pte Ltd	Import/ Distribution	Meat	☎ (+65) 67652121 ✉ contact@lhfood.com.sg 🌐 http://www.lhfood.com.sg/
Lesont	Import/ Distribution	Beer, wine and spirits	☎ (+65) 6333 4563 ✉ info@lesont.com 🌐 http://www.lesont.com/
Le Vigne	Import/ Distribution	Wine and spirits	☎ (+65) 64620053 ✉ le_vigne@singnet.com.sg
Lim Kian Seng Food Supplier	Import/Distribution	Fruit and vegetables	☎ (+65) +65 6779 2826
Lian Hap Xing Kee Edible Oil Trading Ltd	Import/ Distribution	Oils	☎ (+65) 62650593 ✉ enquiry@lianhap.com.sg
Lim Siang	Import/Distribution service in particular)	(food F&B	☎ (+65) 6268 4144 ✉ sales@lshworld.com 🌐 https://lshworld.com/
Lipid Global	Import/ Distribution	Olive oil	☎ (+65) 9384 2909
Magnum spirits and wines	Import/ Distribution/Re-export	Beer, wine and spirits	☎ (+65) 6488 1270 ✉ info@magnum.com.sg 🌐 https://magnum.com.sg/
Marketplace by Jason's	Supermarket	F&B	☎ (+65) 2299 3966 ✉ mpjservice@dairy-farm.com.hk 🌐 https://www.marketplacebyjasons.com/
Masterpiece	Import/ Representative	Wine	☎ (+65) 6339 0470 ✉ sales@masterpc.com.sg

Company name	Type	Area of interest	Contact information
			https://www.masterpiece.com.sg/
Meat.com Pte Ltd	Import/ Distribution	Meat	☎ (+65) 6265 7796 http://www.meat.com.sg/
Meng Chong Foodstuffs Pte Ltd	Import/ Distribution	F&B	☎ (+65)67552222 ✉ mcfoods@mengchong.com.sg http://www.mengchong.com.sg/
Ming Xin Trading	Distribution	Vegetarian Food	☎ (+65) 6552 5955 ✉ mingxin0418@gmail.com www.vegmingxin.com
Monopole	Import/ Distribution	Wine	☎ (+65) 655 43680 ✉ info@monopole.com.sg http://monopole.com.sg
MVO Marketing Pte Ltd	Import/ Distribution	Ice cream	☎ (+65) 68728813 ✉ mvosin@singnet.com.sg https://www.mvo.com.sg/
My Market	Import/ Distribution	F&B (mainly French)	☎ (+65) 6909 5158 ✉ support@my-market.sg https://www.my-market.sg/
Naspac	Import/ Brand representative	F&B (branded goods)	☎ (+65) 6511 7300 ✉ leeyen@naspac.com.sg https://www.naspac.com.sg/
Natrad Food Pte Ltd	Import/ Distribution	Cheese and fine foods	☎ (+65) 6746 9498 ✉ natrad@natradfood.com http://www.natradfood.com/index.html
Niche market exchange	Import/Distribution	Olive oil	☎ (+65) 9857-1096 https://nichemarketexchange.business.site/
Octopus Group	Import/Distribution/Re-export	Wine, Spirits, Beer	☎ (+65) 6533 3312 ✉ info@octopusgroup.com.sg https://www.octopusgroup.com.sg/
OJJ Foods Pte Ltd	Import/ Distribution	Pork meat	☎ (+65) 6255 9183 ✉ sales@ojjfoods.com.sg http://www.ojjfoods.com.sg/
Pin Corporation Pte Ltd	Import/ Distribution	Meat	☎ (+65) 67558758 ✉ lieu@pincorpn.com.sg www.pincorpn.com.sg
Pinnacle Wine and Spirits	Import/ Distribution	Wine and spirits	☎ (+65) 6266 1068 ✉ caleb@pinnaclewinespirits.com

Company name	Type	Area of interest	Contact information
			https://www.pinnaclewinespirits.com/
Phoon Huat Pte Ltd	Import/ Distribution	Bakery ingredients	☎ (+65) 6288 8866 ✉ Sales@phoonhuat.com https://www.phoonhuat.com/
Point to Point exports	Import/ Distribution	F&B (various)	☎ (+65) 66355688 ✉ sales@point2pointexports.com http://www.point2pointexports.com/
Pondok Abang	Import/Distribution	Halal F&B	☎ (+65) 62658300 ✉ pondokabang@singnet.com.sg http://www.pondokabang.com/
Prime Supermarket	Supermarket	F&B	☎ (+65) 6282 5349 ✉ enquiries@primesupermarket.com http://www.primesupermarket.com/
Provenance Distributions Pte Ltd	Import/Distribution	F&B	☎ (+65) 6887 5209 ✉ Enquiries@provenance.com.sg www.provenance.com.sg
Q.B Food Trading Pte Ltd	Import/ Distribution	Meat, Dairy, dry products	☎ (+65) 62616120 ✉ qbfood@qbfood.com.sg www.qbfood.com.sg
Raymang Eggs & Poultry Supplier	Import/ Distribution	Eggs and poultry	☎ (+65) 6292 1626 ✉ raymangeggs@gmail.com
San Sesan Global Pte Ltd	Import/ Distribution	F&B	☎ (+65) 6532 38239 ✉ Sales@sansesan.com http://www.sansesan.com/
SBY Frozen Food Supply Pte Ltd	Import/ Distribution	Meat (frozen)	☎ (+65) 6742 8483 ✉ sales@sbymeat.com https://www.sbymeat.com/
Sevenoaks Wines	Import/ Distribution	Wine	☎ (+65) 6747 9600 ✉ lohdes@singnet.com.sg http://www.sevenoakswines.com/
Sheng Aik Trading Pte Ltd	Import/ Wholesaler	F&B	☎ (+65) 6226 2850 ✉ sales@shengaik.cm http://www.shengaik.com/
Sheng Siong	Supermarket	F&B	☎ (+65) 6895 1888 ✉ contact@shengsiong.com.sg http://www.shengsiong.com.sg/
Singapore Fruits &	Import / import association	Fruit and vegetables	☎ (+65) 67753676

Company name	Type	Area of interest	Contact information
Vegetables Importers & Exporters Association			✉ admin@singapore-fruits-vegetables.org. 🌐 https://singapore-fruits-vegetables.org/
Shwe Mayson Pte Ltd	Import/ Distribution	Baked Goods	☎ (+65) 6897 7206 ✉ lamsin@shwemayson.com 🌐 https://www.facebook.com/myanmar-maysonindustries
Skytime Hupee Foodstuff Pte Ltd	Import/ Wholesaler	F&B	☎ (+65) 6368 3309 ✉ Skytimhupkee@yahoo.com.sg 🌐 http://www.skytimehupkee.com/
SMC 21 Food	Processor / importer	Mainly dairy	☎ (+65) 6264 7672 🌐 http://www.smcfood21.com/
S. S. Kim Enterprises Pte Ltd	Import/ Distribution	Meat, vegetables, fruit (frozen)	☎ (+65) 6897 8378 ✉ marketing@sskim.com.sg 🌐 https://sskim.com.sg/
Supply and Demand	Food service (Italian chain)	Pasta, cheese, wine	☎ (+65) 3138 2503 🌐 https://supplyanddemand.com.sg/
Tangerine	Importer/Distribution	Fruit and Vegetables	☎ (+65) 6681 6550 ✉ contact@tangutangerines.sg 🌐 https://tangytangerines.sg/
Tai Sun	Importer/Distribution	Nuts, Potato Chips, dried fruit and other snacks	☎ (+65) 67779 6611 ✉ info@taisun.com.sg 🌐 http://www.taisun.com.sg/index.html
Teck Leong Lee Kee	Wholesaler	Chocolate and confectionery	☎ (+65) 64450879 ✉ teckleongleekee@gmail.com 🌐 https://www.teckleongleekee.sg/
The Straits Wine company	Import/Distribution/Re-export/Retail	Wine	🌐 https://straitswine.com/
ThyGrace marketing	Import/ Distribution	Fruit and vegetables	☎ (+65) 6774 0098 ✉ teckleongleekee@gmail.com 🌐 https://www.thygrace-marketing.com/
Tiong Lian Food Pte Ltd	Import/ Distribution	Meat (mainly pork)	☎ (+65) 65062388 ✉ sales@tlfood.com.sg 🌐 http://www.tlfood.com.sg/
Toh Thye San Farm	Producer / Wholesaler	Poultrymeat	☎ (+65) 63869300 ✉ alextoh@oeo.com.sg 🌐 http://www.oeo.com.sg/

Company name	Type	Area of interest	Contact information
Topchoice food industries	Import/ Distribution/manufacturing	Pasta, gourmet products	☎ (+65) 6753 1677 ✉ topchoic@singnet.com.sg 🌐 https://www.topchoicesingapore.com/
Top Wines Pte Ltd	Import/ Distribution	Wine and spirits	☎ (+65) 6468 3866 ✉ sales@topwines.com.sg 🌐 http://www.topwines.com.sg/
Transcity Frozen Foods	Import/ Distribution	Meat (frozen)	☎ (+65) 6756 7562 ✉ shop@transcity-sg.com 🌐 http://shop.transcity-sg.com/
TSM Food Services Pte Ltd	Import/ Distribution	Meat (chilled and frozen)	☎ (+65) 6570 3177 🌐 http://www.tsmfoodservices.com/
TVI Pte Ltd	Import/ Distribution	F&B (particularly European Artisanal)	☎ (+65)69093732 ✉ Sales@tvifood.com 🌐 http://www.lilchef.com.sg/
Unico Foods Pte Ltd	Import/ Distribution	Meat and Seafood	☎ (+65) 67780080 ✉ uncofoods@singnet.com.sg
Walson Food Distributor Pte Ltd	Import/ Distribution	Confectionery, food products and beverages	☎ (+65) 6244 7980 ✉ sales@walson.com.sg 🌐 http://www.walson.com.sg/
Wine Studio	Import/ Distribution	Wine and beer	☎ (+65) 9832 9630 ✉ winestudio@sensus.com.sg 🌐 https://www.winestudio.com.sg/
Wines Wholesale	Distribution	Wine	☎ (+65) 9040 7540 ✉ info@wineswholesales.com.sg 🌐 https://www.wineswholesales.com.sg/
WTT Trading Pte Ltd	Import/ Distribution	F&B	☎ (+65) 68528455 ✉ Sales@WTT.com.sg
Yee Lee Oils and Foodstuffs Pte Ltd	Import/ Distribution	F&B	☎ (+65) 6257 8811 ✉ Sales@yeeleeoils.com.sg 🌐 http://www.yeeleeoils.com.sg/
Yes Natural Trading Pte Ltd	Import/ Distribution	F&B	☎ (+65) 62876929 🌐 http://www.yesnatural.sg/
Yiak Say Hang Food Industries Pte Ltd	Import/Wholesaler	F&B	☎ (+65) 67533002 ✉ yshone@singnet.com.sg 🌐 http://www.flour-ysh.com/

Company name	Type	Area of interest	Contact information
Yong Wen Food Pte Ltd	Wholesale (inc food services)	F&B	☎ (+65) 62668100 ✉ Jkee@ywgroup.com.sg 🌐 http://www.ywgroup.com.sg/
Younger (Singapore) Pte Ltd	Import/Distribution/Wholesaler	F&B (mainly Asian)	☎ (+65) 62666907 ✉ admin@youngerfood.com 🌐 http://www.youngerfood.com/
Yours Truly Food Industry Pte Ltd	Import/ Distribution	F&B	☎ (+65) 62928355 ✉ Fcchin8@gmail.com 🌐 http://www.yourstrulygroup.com/
Zirkon-Swis Fine Foods Pte Ltd	Import/ Distribution	Cheese and fine foods	☎ (+65) 64752443 ✉ sales@zirconswis.com.sg 🌐 https://zirconswis.com.sg/

9 European GIs shortlisted to be protected under the EU-Singapore FTA

IMPORTANT, PLEASE NOTE: Annexe 10-A of the FTA contains a list of 196 GIs for which protection under the FTA was agreed. In order to finalise this protection, the GI holders had to complete the registration and pay the GI registration fee. At the time of writing, 139 of the 196 GIs have successfully completed registration. The list below contains all 196 GIs agreed for protection; but those which have not so far completed registration are displayed in light grey.

The final list of GIs which are protected under the FTA are listed in Annexe 10-B of the FTA.

Trademark Name	Product type
AUSTRIA	
Steirisches Kürbiskernöl	Pumpkin seed oil
Tiroler Speck	Bacon
Inländerrum	Spirit
Jägertee/Jagertee/Jagatee	Spirit
CYPRUS	
Ζιβανία/Τζιβανία/Ζιβάνα/Zivania	Spirit
Κουμανδαρία/Commandaria	Wine
CZECH REPUBLIC	
České pivo	Beer
Českobudějovické pivo	Beer
Žatecký chmel	Hops
Budějovické pivo	Beer
Budějovické pivo	Beer
GERMANY	
<i>Bayerisches Bier</i> ¹²⁵	Beer
Aachener Printen	Bakery good / biscuit
Lübecker Marzipan	Marzipan
Nürnberger Bratwürste; Nürnberger Rostbratwürste	Sausage
Nürnberger Lebkuchen	Bakery good / biscuit
Münchener Bier	Beer
Schwarzwälder Schinken	Ham
Franken	Wine
Hopfen aus der Hallertau	Hops
Bremer Klaben	Bread, Pastry, cakes, confectionery, biscuits and other
Mittelrhein	Wine
Mosel	Wine

¹²⁵ In application at the time of writing with opposition proceedings in Singapore

Trademark Name	Product type
Rheingau	Wine
Rheinhessen	Wine
GERMANY, AUSTRIA, BELGIUM (German speaking community)	
Korn/Kornbrand	Spirit
DENMARK	
Danablu	Cheese
SPAIN	
Antequera	Olive oil
Azafrán de la Mancha	Saffron
Aceite del Baix Ebre-Montsía	Olive oil
Aceite del Bajo Aragón	Olive oil
Aceite de Terra Alta	Olive oil
Baena	Olive oil
Brandy de Jerez	Spirit
Cataluña	Wine
Cítricos Valencianos; Cítricos Valencians ¹²⁶	Oranges, mandarins and lemons
Estepa	Ham
Jamón de Teruel/Paleta de Teruel	Ham
Jabugo	Ham
Jijona	Nougat
Guijuelo	Ham
Mahón-Menorca	Cheese
Les Garrigues	Olive oil
Priego de Córdoba	Olive oil
Queso Manchego	Cheese
Salchichón de Vic	Sausages
Siurana	Olive oil
Sierra de Cazorla	Olive oil
Sierra de Segura	Olive oil
Sierra Mágina	Olive oil
Turrón de Alicante	Nougat
Utiel-requena	Wine
Pacharán navarro	Spirit
Alicante	Wine
Bierzo	Wine
Cataluña	Wine
Cava	Wine

¹²⁶ Varietal names containing or consisting of "Valencia" may continue to be used on similar product, provided the consumer is not misled on the nature of such term or the precise origin of product.

Trademark Name	Product type
Empordà	Wine
Jerez-Xérès-Sherry	Wine
Jumilla	Wine
La Mancha	Wine
Málaga	Wine
Manzanilla-Sanlúcar de Barrameda	Wine
Navarra	Wine
Penedès	Wine
Priorat	Wine
Rías Baixas	Wine
Ribera del Duero	Wine
Rioja	Wine
Rueda	Wine
Somontano	Wine
Toro	Wine
Valdepeñas	Wine
Valencia	Wine
FINLAND	
Suomalainen Vodka/Finsk Vodka/Vodka of Finland	Spirit
Finnish berry liqueur	Spirit
FRANCE	
Brie ¹²⁷ de Meaux	Cheese
Camembert ¹²⁸ de Normandie	Cheese
Canard à foie gras du Sud-Ouest (Chalosse, Gascogne, Gers, Landes, Périgord, Quercy)	Processed meat product of duck
Comté	Cheese
Emmental ¹²⁹ de Savoie	Cheese
Jambon de Bayonne	Ham
Pruneaux d'Agen; Pruneaux d'Agen mi-cuits	Prunes
Reblochon; Reblochon de Savoie	Cheese
Roquefort	Cheese
Armagnac	Spirit
Calvados	Spirit
Cognac; Eau-de-vie de Cognac; Eau-de-vie des Charentes	Spirit
Alsace/Vin d'Alsace	Wine
Anjou	Wine
Beaujolais	Wine

¹²⁷ The protection of the term "brie" is not sought.

¹²⁸ The protection of the term "camembert" is not sought.

¹²⁹ The protection of the term "emmental" is not sought.

Trademark Name	Product type
Bordeaux	Wine
Bourgogne	Wine
Chablis	Wine
Champagne	Wine
Châteauneuf-du-Pape	Wine
Languedoc	Wine
Côtes de Provence	Wine
Côtes du Rhône	Wine
Côtes du Roussillon	Wine
Graves	Wine
Haut-Médoc	Wine
Huîtres de Marennes Oléron	Fresh fish
Huile d'olive de haute-provence	Hams
Huile essentielle de lavande de Haute-provence	Essential oil – Lavender
Margaux	Wine
Médoc	Wine
Moselle	Wine
Pays d'Oc	Wine
Saint-Emilion	Wine
Sauternes	Wine
Touraine	Wine
Val de Loire	Wine
GREECE	
Ελιά Καλαμάτας ¹³⁰ (Elia Kalamatas)	Table olive
Ούζο/Ouzo	Spirit
Φέτα (Feta)	Cheese
Μαστίχα Χίου (Masticha Chiou)	Natural gum and chewing gum
Σάμος (Samos)	Wine
GREECE; CYPRUS	
Ούζο (Ouzo)	Spirit
HUNGARY	
Pálinka	Spirit
Szegedi téliszalámi / Szegedi szalámi	Ham
Törkölypálinka	Spirit
Tokaj/Tokaji	Wine
IRELAND	
Irish Cream	Spirit
Irish Whiskey/Uisce Beatha	Spirit

¹³⁰ The varietal name "Kalamata" may continue to be used on similar product, provided that the consumer is not misled on the nature of such term or the precise origin of product.

Trademark Name	Product type
Eireannach/Irish Whisky	
ITALY	
Aceto Balsamico di Modena	Vinegar
Aceto balsamico Tradizionale di Modena	Vinegar
Asiago	Cheese
Bresaola della Valtellina	Dried salted beef
Cotechino Modena	Sausages
Fontina	Cheese
Gorgonzola	Cheese
Grana Padano	Cheese
Kiwi Latina	Kiwi
Mela Alto Adige; Südtiroler Apfel	Apple
Mortadella Bologna	Processed meat
Mozzarella ¹³¹ di Bufala Campana	Cheese
Parmigiano ¹³² Reggiano	Cheese
Pecorino ¹³³ Romano	Cheese
Pecorino Sardo	Cheese
Pecorino Toscana	Cheese
Prosciutto di Parma	Ham
Prosciutto di San Daniele	Ham
Prosciutto Toscano	Ham
Provolone ¹³⁴ Valpadana	Cheese
Taleggio	Cheese
Grappa	Spirit
Acqui/Brachetto d'Acqui	Wine
Asti	Wine
Arancia Rossa di Sicilia	Fruit & Vegetables
Barbaresco	Wine
<i>Bardolino Superiore</i> ¹³⁵	Wine
Barolo	Wine
Brunello di Montalcino	Wine
Bolgheri Sassicaia	Wine
Cappero di Pantelleria	Fruit & Vegetables
Campania	Wine

¹³¹ The protection of the term "mozzarella" is not sought.

¹³² The provisions of Article 6 shall in no way prejudice the right of any person to use, or to register in Viet Nam a trade mark containing or consisting of the term "parmesan". This does not apply in respect of any use that would mislead the public as to the geographical origin of the good.

¹³³ The protection of the term "pecorino" is not sought.

¹³⁴ The protection of the term "provolone" is not sought.

¹³⁵ In application at the time of writing with opposition proceedings in Singapore.

Trademark Name	Product type
Chianti	Wine
Conegliano Valdobbiadene - Prosecco	Wine
Dolcetto d'Alba	Wine
Franciacorta	Wine
Lambrusco di Sorbara	Wine
Lambrusco Grasparossa di Castelvetro	Wine
Marsala	Wine
Montepulciano d'Abruzzo	Wine
Pesca e nettarina di Romagna	Fruit & Vegetables
Pomooro di pachino	Fruit & Vegetables
Sicilia	Wine
Soave	Wine
Toscana/Toscano	Wine
Veneto	Wine
Vino Nobile di Montepulciano	Wine
Zampone Modena	Ham
NETHERLANDS	
Gouda ¹³⁶ Holland	Cheese
BELGIUM; NETHERLANDS; FRANCE; GERMANY	
Genièvre/Jenever/Genever	Spirit
POLAND	
Polish Cherry	Spirit
Polska Wódka/Polish vodka	Spirit
Wódka ziołowa z Niziny Północnopodlaskiej aromatyzowana ekstraktem z trawy żubrowej (Herbal vodka from the North Podlasie Lowland aromatised with an extract of bison grass)	Spirit
PORTUGAL	
Queijo S. Jorge	Cheese
Alentejo	Wine
Bairrada	Wine
Dão	Wine
Douro	Wine
Madeira	Wine
Porto/Port/Oporto	Wine
Vinho Verde	Wine
ROMANIA	
Cotnari	Wine
Dealu Mare	Wine
Murfatlar	Wine

¹³⁶ The protection of the term "gouda" is not sought.

Trademark Name	Product type
Cotești	Wine
Panciu	Wine
Recaș	Wine
Odobești	Wine
Târnave	Wine
SWEDEN	
Svensk Vodka/Swedish Vodka	Spirit
SLOVAKIA	
Vinohradnícka oblasť Tokaj	Wine
UNITED KINGDOM*	
Scotch Whisky	Spirit

Source: Annex 10A of the EU-Singapore Free Trade Agreement

* Annex 10A of the FTA was agreed at time that the UK was an EU member, and hence includes the UK GI of Scotch Whisky.

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