



In partnership with:



Department for
International Trade

Here to give the UK seafood sector
the support it needs to thrive.



Export Guide: **Singapore**

Market Research Report



Department for International Trade

CONTENTS

| | |
|-----------------------------------------------------|----|
| CONTENTS | 2 |
| 1. EXECUTIVE SUMMARY | 3 |
| 1.1 SUMMARY OF THE ENQUIRY | 3 |
| 1.2 METHODOLOGY | 3 |
| 2. MARKET RESEARCH | 4 |
| 2.1 MATCHING PROFILE..... | 4 |
| 2.11 THE TRADE ENVIRONMENT | 4 |
| 2.12 THE SEAFOOD SECTOR..... | 8 |
| 2.13 CONSUMER TRENDS | 17 |
| 2.14 UK SHARE AND EXPORT OPPORTUNITIES | 19 |
| 2.2 BUSINESS PROFILE..... | 33 |
| 2.21 THE SUPPLY STRUCTURE | 34 |
| 2.22 THE RETAIL CHANNEL | 34 |
| 2.23 THE FOOD SERVICE CHANNEL..... | 39 |
| 2.24 KEY REGULATIONS AND TARIFFS..... | 42 |
| 2.25 USEFUL LINKS..... | 46 |
| 3. NEXT STEPS..... | 48 |
| 4. DIT CONTACTS..... | 49 |
| 5. DISCLAIMER | 50 |
| HS CAT CODE FULL DESCRIPTIONS (TABLE 2.12 C&D)..... | 51 |



Department for
International Trade

1. EXECUTIVE SUMMARY

1.1 SUMMARY OF THE ENQUIRY

Established in 1981 by an Act of Parliament, the Seafish Industry Authority (Seafish), is the public body charged with supporting all areas of the £10bn UK seafood industry to promote good quality sustainable seafood. This includes; catching and aquaculture, processors, importers and exporters, distributors of seafood, restaurants and retailers. Seafish plays a pivotal role in facilitating the growth of the international seafood industry, building relationships and providing information to overseas and domestic buyers. This report sets out to identify the opportunities for exporting British seafood to Singapore.

1.2 METHODOLOGY

The Department for International Trade was commissioned to update the information in the previous OMIS report done in 2015.

The research brief involves the following components:

➤ **Matching Profile**

- The Trade Environment
- The Seafood Sector
- Consumer Trends
- UK Share and Export Opportunities

➤ **Doing Business Profile**

- The Supply Structure
- The Retail Channel
- The Foodservice Channel
- Key Regulations and Tariffs
- Useful Links

The required research was put together from various sources including official websites of various Government bodies such as the Department of Statistics Singapore, the Agri-Food and Veterinary Authority of Singapore, and Customs Singapore, as well as trade publications and reports from Enterprise Singapore.



Department for International Trade

2. MARKET RESEARCH

2.1 MATCHING PROFILE

2.11 THE TRADE ENVIRONMENT

Fast Facts on Singapore

- General Information

- Capital : Singapore
- Other main cities : nil
- Languages : English, Mandarin, Malay, Tamil
- Religions : Buddhism, Christianity, Islam, Hinduism, Taoism
- Currency : Singapore dollar (S\$)
- Exchange rate : £ 1 = S\$ 1.7707 / S\$1 = £0.56632
- International status Member of ASEAN and APEC
- Government type Republic with parliamentary democracy

- Population (as of 2018)

- Total Population* ('000): 5,638.7
- Singapore Residents* ('000): 3,994.3
- Singapore Citizens ('000): 3,471.9
- Singapore Permanent Residents ('000): 522.3

* Total population comprises Singapore residents and non-residents. The resident population comprises Singapore citizens and permanent residents.

- Land Area (as of 2018)

- Land Area (Sq km): 722.5
- Population Density/Inhabitants per sq km: 7,804

- Households (as of 2018)

- Number of Resident Households ('000): 1,289.9
- Home Ownership Rate (%): 90.7



Department for International Trade

• Economic Indicators (as of 2018)

| | |
|---------------------------------------------------------------------|-----------------------------|
| ➤ GDP at Current Market Prices (S\$m) | : 447,283.5 (£253,305.59 m) |
| ➤ GDP per Capita (S\$) | : 79,697 (£45,134.01) |
| ➤ Annual Growth (%) | : 3.6 |
| ➤ Annual Inflation Rate (%) | : 1.5 |
| ➤ Unemployment Rate (Seasonally Adjusted as of June 2018) (%) | : 2.2 |
| ➤ Total Trade (S\$m) | : 967102.4 (£547,689.43) |
| ➤ Exports (S\$m) | : 515,000.8 (£291,655.25) |
| ➤ Domestic Exports (S\$m) | : 259,302 (£146,847.9) |
| ➤ Imports (S\$m) | : 452,101.6 (£256,034.17) |

• Food Import and Export Figures

- Imports of Fish and Seafood (excluding marine mammals) in Singapore averaged S\$124.42m (£70.46m) per month from 2014 until 2017 reaching an all time high of S\$169.32m (£95.89m) in Dec 2016.
- Total food imports in 2017 totalled S\$10.9bn (£6.17bn), reflecting a 2.2% year-on-year increase.
- Total food exports in 2017 totalled S\$6.1bn (£3.45bn), reflecting a 1.6% decline year-on-year.

• Trading Partners

- Top 5 trading partners in 2017 include China, Hong Kong, Indonesia, Malaysia and the United States.
- The top five countries Singapore imported from in 2017 include China, the EU, Malaysia, the United States and Taiwan.
- The top five countries Singapore exported to in 2014 include China, Malaysia, the United States, Indonesia and Hong Kong,.

• General Information

- Singapore is a leading global business hub with an open and trade driven economy. The country is strategically located where the major east and west shipping lanes converge. The port of Singapore is the second-busiest in the world by cargo tonnage. It is a financial, shipping and trading hub for the Asia Pacific region.
- Singapore is the UK's largest trading partner in Southeast Asia, with two thirds of UK exports to this region flowing into Singapore.



Department for International Trade

- Singapore's economy is known to be innovative, competitive and business-friendly. The country has been ranked **second** by the World Bank for ease to do business with. Singapore has a stable government and is the only country to receive AAA credit ratings from all three credit rating agencies. It attracts a heavy amount of foreign direct investment as a result of its stable government, strong rule of law and effective regulatory system.
- The Singapore government does not impose tariffs on imported goods, with the exception of alcohol, tobacco, motor vehicles and petroleum products. There is a 7% Goods and Services tax, known as GST, levied at the point of purchase, similar to the VAT.
- There are over 30,000 British nationals and some 700 British companies in Singapore.
- Please see the Guide to Exporting to Singapore:
<https://www.gov.uk/government/publications/exporting-to-singapore/exporting-to-singapore>
- **Market Trends**
 - Singapore's total merchandise trade increased by 11.1% in 2017, reversing the declines in the preceding two years (2016: -4.9%, 2015: -8.9%). Total merchandise trade reached S\$967 billion in 2017, higher than the S\$870 billion and S\$915 billion in 2016 and 2015 respectively. Both exports and imports expanded by 10.3% and 12.1% respectively in 2017.
 - As a small city-state, Singapore is highly dependent on imports for its food supply, including seafood. The growing affluence and exposure of younger and middle aged consumers to international trends, has resulted in an increased demand for premium products and more sophisticated dining options.
 - Singapore is home to some of the world's largest commodity trading companies across the three key clusters – Energy & Chemicals, Metals & Minerals and Agri-commodities. These companies generate more than £784 billion in annual turnover. There is an extensive network of players along the commodity value chain in supply chain, logistics, financing and other ancillary services.
 - Singapore is the fourth largest financial hub in the world. With over 500 financial institutions, providing 25-35% of trade finance for commodities trading in Asia. Singapore is strategically located at the heart of Asian trade routes, with 30% of all Asian trading being conducted through Singapore.



Department for International Trade

- Singapore has a well-educated and culturally adaptive global talent pool. 47% of the Singapore workforce has a tertiary education and 72% are literate in at least two languages. However, Singapore is also known to have one of the highest levels of income inequality in East & South East Asia. As at 2014, Singapore's Gini Coefficient measuring income distribution was 0.464 before government transfers and 0.412 after transfers (Household Income Trends 2014 published by Singstats).
- For the whole of 2017, the Singapore economy grew by 3.6%, faster than the 2.4% growth in 2016.
- The manufacturing sector expanded by 10.1%, accelerating from the 3.7% growth in 2016. Growth was largely driven by the electronics and precision engineering clusters, even as the biomedical manufacturing, transport engineering and general manufacturing clusters contracted.
- The construction sector shrank by 8.4%, a reversal of the 1.9% growth in 2016. Output in the sector was primarily weighed down by the weakness in private sector construction works, which contracted by 29.1% on the back of a decline in private residential and private industrial works.
- The services producing industries grew by 2.8%, higher than the 1.4% growth in 2016. Growth was mainly supported by the finance & insurance, wholesale & retail trade and transportation & storage sectors, which expanded by 4.8%, 2.3% and 4.8% respectively.

Source: *Department of Statistics of Singapore*

<https://www.singstat.gov.sg/find-data/search-by-theme/economy/national-accounts/latest-data>

<https://www.singstat.gov.sg/-/media/files/publications/households/pp-s24.pdf>

<https://tradingeconomics.com/singapore/imports-of-fish-seafood-excl-marine-mammals->

<https://www.singstat.gov.sg/-/media/files/news/gdp4q2017.pdf>



Department for International Trade

2.12 THE SEAFOOD SECTOR

All calculated figures are based on the following exchange rate:

£ 1 = S\$ 1.7707 / S\$1 = £0.56632

Table 1 Import Price Index
March 2018

| Commodity section / division | Weights | Index (2012=100) | | | % Change | | |
|------------------------------|---------------|------------------|-------------|-------------|-------------|-------------|-------------|
| | | Jan 2018 | Feb 2018 | Mar 2018 | Feb 2018 | Mar 2018 | Mar 2018 |
| | | | | | Jan 2018 | Feb 2018 | Mar 2017 |
| All Items | 10,000 | 84.6 | 84.1 | 83.5 | -0.5 | -0.7 | 1.4 |
| Non-oil Items | 6,684 | 95.1 | 95.4 | 94.6 | 0.3 | -0.8 | -1.9 |
| Food & Live Animals | 215 | 99.5 | 99.4 | 97.2 | -0.1 | -2.2 | -3.2 |
| Live animals | 9 | 96.7 | 99.9 | 94.6 | 3.3 | -5.3 | -6.2 |
| Meat & meat preparations | 26 | 99.0 | 99.4 | 96.7 | 0.4 | -2.7 | -6.6 |
| Dairy products & birds' eggs | 28 | 96.6 | 91.6 | 89.3 | -5.2 | -2.5 | -3.6 |
| Fish seafood & preparations | 28 | 109.5 | 111.7 | 111.8 | 2.0 | 0.1 | 1.2 |

- In the first quarter of 2018 seafood grew, in terms of import price index. Table 1 shows, total fish, seafood (excl marine mammals) & preparations imports increasing compared with other food commodity sections showing a decline. This increase in seafood reflected 1.1% average year-on-year increase across the first quarter.

A) Fish, Seafood (excl marine mammals) & Preparations Import and Export Figures (in £ million)

| | 2015 | 2016 | 2017 |
|--------|-------------|-------------|-------------|
| Import | £839m | £868m | £853m |
| Export | £290m | £279m | £260m |

Figure 2.12 A

- As Figure 2.12 A shows, total fish, seafood (excl marine mammals) & preparations imports in 2017 totalled £853 million, reflecting a 1.73 % year-on-year decline. Whereas 2016 saw an increase of 1.7% compared to imports in 2015.
- Total fish, seafood (excl marine mammals) & preparations exports in 2017 totalled £260 million, reflecting a 6.82% year-on-year decrease. In general, exports have declined from 2008 to 2017.



Department for International Trade

- Singapore has long been and still is a net importer of fish, seafood and preparations, with imports worth nearly thrice that of exports.

Source: *Enterprise Singapore*

Links: <http://www.tablebuilder.singstat.gov.sg/publicfacing/mainMenu.action>
(Trade and investment, Merchandise trade data)

<https://www.singstat.gov.sg/-/media/files/publications/economy/ipimar18.pdf>

B) Seafood Supply, Trade and Wholesale (in tonnes)

| Variables | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|-------------------------------|---------|---------|---------|---------|---------|---------|---------|
| Local Production ¹ | 5,599 | 5,547 | 6,775 | 6,379 | 7,699 | 6,822 | 6,498 |
| Imports ² | 129,073 | 123,982 | 122,814 | 119,858 | 121,577 | 116,863 | 116,351 |
| Exports ³ | 31,390 | 28,830 | 25,364 | 16,593 | 22,827 | 19,458 | 17,544 |
| Seafood Wholesale | 62,635 | 61,405 | 59,094 | 54,000 | 49,436 | 47,092 | 45,412 |

SOURCE: AGRI-FOOD AND VETERINARY AUTHORITY, ENTERPRISE SINGAPORE

Note: Seafood refers to fish, crustaceans and molluscs

1. Includes seafood from local landings, coastal and land-based farm production
2. Excludes dried, salted and fish in brine
3. Includes fresh, frozen seafood and 'Low-value fish'.

Figure 2.12 B

- As Figure 2.12 B shows, 83% (116,351 tonnes) of Singapore's seafood supply was imported in 2017, compared with 77% in 2011.
- In 2017 exports made up 17,544 tonnes (12.5%). This was largely flat compared to that of 2014, where 11.6% of seafood was exported.
- The proportion of Singapore's seafood supply that was locally produced, from 2011 to 2017 has remained consistent at around 4%.
- Fish wholesale has decreased 27.5% from 2011 to 2017.

Sources: *Agri-Food & Veterinary Authority & Enterprise Singapore*

Link: <http://www.singstat.gov.sg/statistics/finding-a-z>



Department for International Trade

C) Imports of Fish and Seafood to Singapore (broad category) in 2017

- As shown in the previous segment, a huge proportion of Singapore's fish and seafood supply is imported, as compared to that which is locally produced.
- Fresh fish and seafood, including processed products, can be imported from any country unless the products are noted as high-risk. Currently, chilled shucked raw oysters, chilled cockle meat, chilled cooked prawn/shrimp and chilled crab meat are not permitted for import.
- For live oysters, import is only allowed from countries which meet AVA's requirements for a shellfish sanitation programme such as
 - Australia
 - Canada
 - France
 - Ireland
 - The Netherlands
 - New Zealand
 - **United Kingdom**
 - USA

Each consignment that is imported must be accompanied by a health certificate issued by the relevant authority of the exporting country.

- For Frozen oysters, frozen blood cockle meat, frozen cooked prawns and frozen raw/cooked crab meat, each consignment must be accompanied by a health certificate issued by the relevant authority of the exporting country.

2.12C – Imports of Fish & Seafood to Singapore, Broad Category

Values in thousands, using S\$ to GBP: 0.56632

| HS Cat | Item | 2015 | 2016 | 2017 |
|--------|--------------------------------------------------------|---------|----------|----------|
| 0301 | LIVE FISH | £28,447 | £25,936 | £26,106 |
| 0302 | FISH FRESH OR CHILLED | £98,198 | £105,770 | £106,727 |
| 0303 | FISH FROZEN | £96,265 | £125,538 | £131,155 |
| 0304 | FISH FILLETS & OTHER FISH MEAT FRESH CHILLED OR FROZEN | £77,787 | £77,295 | £83,342 |



Department for International Trade

| | | | | |
|------|------------------------------------------------------|----------|----------|----------|
| 0305 | FISH DRIED SALTED OR IN BRINE SMOKED | £54,917 | £63,282 | £50,468 |
| 0306 | CRUSTACEANS | £139,548 | £143,964 | £146,619 |
| 0307 | MOLLUSCS | £60,541 | £60,710 | £69,838 |
| 0308 | AQUATIC INVERTEBRATES EXCL CRUSTACEANS & MOLLUSCS | £24,010 | £16,043 | £20,677 |

- The highest value HS category of imports into Singapore is 0306 (crustaceans) worth £146,619,000 in 2017 which grew at 1.8% over the previous year.
- The second highest value category is frozen fish which was worth £131,155,000 and grew 4.5% (£5,617,000) in 2017.
- Fish imports account for 63% of the total seafood imports in 2017 worth £397,798,000.
- The two biggest growth categories in 2017 were molluscs +15% (£9,128,000), and fish fillets +7.8% (£6,047,000).

Source: *Enterprise Singapore* (<https://statlink.enterprisesg.gov.sg/>)
& *Agri-Food and Veterinary Authority of Singapore*

2.12D – Exports of Fish & Seafood to Singapore, Broad Category

Values in thousands, using S\$ to GBP: 0.56632

| HS Cat | Item | 2015 | 2016 | 2017 |
|--------|--------------------------------------------------------------|---------|---------|---------|
| 0301 | LIVE FISH | £36,764 | £34,698 | £31,150 |
| 0302 | FISH FRESH OR CHILLED | £7,515 | £11,361 | £7,910 |
| 0303 | FISH FROZEN | £44,089 | £56,865 | £70,100 |
| 0304 | FISH FILLETS & OTHER FISH MEAT FRESH CHILLED OR FROZEN | £27,289 | £22,730 | £21,576 |
| 0305 | FISH DRIED SALTED OR IN BRINE SMOKED FISH | £41,682 | £42,958 | £30,591 |



Department for International Trade

| | | | | |
|------|------------------------------------------------------|---------|---------|---------|
| 0306 | CRUSTACEANS | £18,199 | £19,280 | £16,185 |
| 0307 | MOLLUSCS | £17,803 | £11,180 | £21,201 |
| 0308 | AQUATIC INVERTEBRATES EXCL CRUSTACEANS & MOLLUSCS | £12,987 | £7,900 | £8,465 |

- Exports have remained flat for the last 3 years with less than 0.5% growth in total.
- Growth in exports was driven by frozen fish which increased 23% (£13,235,000) in 2017.
- Molluscs and aquatic invertebrates increased in 2017, however both had seen declines of 40% in 2016 compared with 2015. Molluscs saw a 90% increase in 2017 (+£10,021), and aquatic invertebrates were up 7% (£565,000).
- The most notable decline in 2017 came from fish – dried, salted, smoked or in brine, at -29% (-£12,367) compared with the previous 2 years.

Source: Enterprise Singapore (<https://statlink.enterprisesg.gov.sg/>)



Department for International Trade

D) Fisheries

- Singapore has two fishery ports: the Jurong Fishery Port (JFP) and the Senoko Fishery Port (SFP).
- The Jurong Fishery Port (JFP) is an international port for foreign vessels to land their fish catch. It is also a marketing and distribution centre handling more than 50,000 tonnes of fish a year, comprised largely of fresh fish landed by foreign vessels as well as those imported by air and road.
- The fish sold at JFP are imported from the following sources:
 - by sea from Indonesia
 - by land from Malaysia
 - by air from Australia, Bangladesh, China, India, Myanmar, Taiwan and Vietnam
 - frozen tuna is also transhipped through the JFP
- JFP has a 9,000sqm wholesale fish market which is host to 110 market lots. There are about 103 AVA-licensed fish merchants that conduct wholesale fish business at JFP. Some 2,000 to 3,000 fish retailers, fish processors and institutional buyers shop this market daily to buy fish. The price of fish is dependent on supply and demand, type, size and freshness.

The species of fish sold are:

- | | |
|--------------------|------------------|
| • Prawn | • Red Snapper |
| • Crab | • Grouper |
| • Lobster | • Threadfin |
| • Finfish | • Horse Mackerel |
| • Sea Bream | • Squid |
| • Spanish Mackerel | • Pomfret |
| • Gold-Banded Scad | • Mackerel |
- The Senoko Fishery Port (SFP) began its operations in September 1997. A home base for local fishing fleet comprised of 4 off-shore, 35 in-shore vessels. There are 25 AVA-licensed fish merchants based at SFP, handling 15,000 tonnes of fish a year.
 - More information about the JFP and SFP can be found at:
<https://www.ava.gov.sg/explore-by-sections/fisheries/fishery-ports/fishery-port-services>



Department for International Trade

- There are 141 seafood processing establishments licensed to manufacture fishery products in Singapore. Four processing establishments and one cold store are approved to export seafood products to the EU countries.
- To support the fish farming industry, AVA invested \$3.85 million in building a new jetty for local farmers. Located at Lorong Halus, the 3,000sqm jetty is 30 times larger than the landing site at Changi Creek. The facilities support large-scale farming operations, and switching over has allowed farmers to enjoy increased productivity.
- Previously, 63 of the 117 coastal fish farms – which operate in the eastern Straits of Johor – used Changi Creek and Senoko Fishery Port as landing points.

Source:

Department of Statistics Singapore and Agri-Food and Veterinary Authority of Singapore

Links:

https://www.ava.gov.sg/files/avavision/issue1_2015/fishy-business-new-jetty-provides-greater-convenience.html

E) Aquaculture in Singapore

• Foodfish farming

- Currently there are 125 fish farms in Singapore, of which seven are land-based. Fish farms produced a total of 6,086 tonnes of fish in 2017, accounting for about 6.1 per cent of total tonnage. This is up from the 3,158 tonnes locally produced in 2012.
- This is mainly from coastal fish farms, which produce marine foodfish species like groupers, seabass, snappers and milkfish as well as green mussels and crustaceans. There are also freshwater food fish farms producing snakeheads, tilapia, catfishes and carps and other cyprinids, as well as laboratories that breed fast-growing fish.
- There are 117 floating fish farms covering 100.3 hectares of coastal waters, culturing high-value fish like groupers and seabass for the live fish market and supermarkets.



Department for International Trade

- While imported fish take three to five days to reach a customer from the time they are caught, it takes about 12 hours to move them from a local farm to the supermarket shelf. More importantly, foodfish farming enables Singapore to be less dependent on foreign supply which can easily be affected in the event of an outbreak.
- Many major ornamental fish farms have started cultivating food fish in the light of dwindling profits of aquarium fish. Of the estimated 70 ornamental fish farms, at least five – Apollo Aquarium, Panda Aquatic Centre, Nippon Koi Farm, Max Koi Farm, and Dream fish Inc have embarked on making the change.
- Local ornamental fish farms rearing food fish on the side, are inventing their own seawater recycling systems to do so. Some of Singapore's farms, such as Nippon Koi Farm and Swee Chioh Fishery, have already been using technology to maximise productivity and efficient land-use.
- AVA's Marine Aquaculture Centre (MAC) develops technology for the farming of tropical marine food fish. Suitable technologies and intensive farming systems are transferred to local food fish farms, so that Singapore's supply of these fishes can be enhanced. A selective breeding project involving Asian seabass and Mozambique tilapia is currently ongoing at MAC. The project develops fastgrowing and good quality fish fry for intensive farming by the aquaculture industry.

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

Links:

[http://www.ava.gov.sg/files/avavision/Issue1_2015/pdf/AVA_BumperNewsletter-FA\[LR\].pdf](http://www.ava.gov.sg/files/avavision/Issue1_2015/pdf/AVA_BumperNewsletter-FA[LR].pdf)

https://www.straitstimes.com/sites/default/files/attachments/2017/10/03/st_20171003_xfish_3461863.pdf

F) Post Harvest Technology for Fish

- Strategically positioned in the midst of the major fishing countries in Southeast Asia, Singapore has long recognized the opportunity to develop and expand its seafood processing industry.
- Since the late 1970s, AVA has been instrumental in turning the fish processing industry from a predominantly labour intensive, backyard industry into a highly automated and high capacity fish product manufacturing business, catering for both domestic demand and export to huge seafood markets like the US, EU and Australia.



Department for International Trade

- Notable among the contributions of AVA to the industry was the introduction of the 'Hazard Analysis and Critical Control Points' (HACCP) concept to the seafood processing industry, and assisting individual manufacturers to develop their own HACCP programmes. AVA also played a key role in setting up the Seafood Industries Association Singapore (SIAS), which brings together the seafood processing, manufacturing and trading companies in Singapore. <http://seafoodsingapore.org/>
- With the aim to aid the local fish processing industry, AVA has been largely active in assisting the aquaculture industry in promoting the utilisation of farmed fish through product development. AVA has also been assisting the fish processing industry to develop HACCP systems and value-added products.
- The Post-Harvest Technology Centre (PHTC) is also the Collaborating Centre for the Southeast Asian Fisheries Development Center (SEAFDEC)'s Marine Fisheries Research Department (MFRD) programme on fisheries post-harvest technology. SEAFDEC is a regional inter-governmental organization of which Singapore is a member country.
- The MFRD programme aims to promote, undertake and co-ordinate research and development on fisheries post-harvest technology, including the processing, handling, preservation and quality assessment of fish and fish products, and transfer such technology to the region through training courses, seminars and workshops.
- Currently, there are two projects under the MFRD programme which are being implemented by PHTC:
 1. Chemicals and Drug Residues in Fish and Fish Products in Southeast Asia – Biotoxins (ASP, AZA and BTX) and Harmful Algal Blooms (HABs) in the ASEAN region;
 2. Traceability Systems for Aquaculture Products in ASEAN region.
- The AVA carries out R&D in fisheries post-harvest technology. Some of the areas of research include:
 1. Developing value-added fish products from marine and aquacultured fish species (smoked fish, half-shelled frozen mussel)
 2. Developing GMP for fishball and fishcake, battered and breaded fish and chicken products
 3. Developing standard and quality testing methods for fishball and fishcake
 4. Developing value added mussel sauce from mussel broth (i.e. a by-product of cooked frozen half-shell mussel processing)
 5. Developing good handling practices and techniques for seafood



Department for International Trade

- Other areas under AVA's purview include managing the Marine Fisheries Research Department (MFRD), carrying out R&D in fisheries post-harvest technology, organizing of study trips and workshops to upgrade skills and build contacts, and providing consultancy on HACCP, fish processing and product development.

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

Links: <http://www.ava.gov.sg/about-ava/avas-centres#post-harvest-technology-centre>

2.13 CONSUMER TRENDS

- Singapore is one of the biggest seafood consumers in Asia-Pacific consuming over 140 million kilograms a year. Singapore's seafood consumption is 22kg per capita, which is higher than the average global consumption of 20kg.
- Seafood is widely available in the Singapore food scene, whether local hawker stalls, food courts, and restaurants, or the many international dining venues that set up here. Fish, prawns and crabs are among the favourite types of seafood that Singaporeans like to indulge in at home or outside on a fairly regular basis. Salmon, lobsters, and abalone are also well liked, though generally served at high-end restaurants. Salmon, mainly from Norway, is widely available in supermarkets now.
- At present, about 95% of Singapore's seafood comes from other countries. Popular seafood that is sold in the market are Salmon, Codfish, Threadfin, White Pomfret, Chinese Pomfret, Red Grouper, Spanish Mackerel (Batang), Big Sea Bream, Wolf Herring, Rabbit Fish, Prawns, Crabs and Squid.
- From the data above, frozen fish, live fish and dried, salted, in brine or smoked seafood were the largest import category in 2017. Frozen fish had the largest increase from £56,865 in 2016 to £70,100 in 2017 (an increase of £13,235). Demand molluscs has risen significantly in Singapore, increasing from £17,803 in 2015 to £21,201 in 2017 (all figures in thousands)
- The foodservice channels have demand for live, fresh/chilled, and frozen seafood. Demand varies with the target market and the type of outlet. High-end Asian outlets prefer live, if not fresh/chilled fish and shellfish. Western fine dining establishments aim to offer fresh/chilled seafood as much as possible, while mid priced outlets are more likely to use frozen products.



Department for International Trade

- Dried, salted and smoked fish and seafood are available at a range of channels, from high end outlets with demand for smoked wild salmon to low end food stalls with demand for dried anchovies (known as *Ikan Bilis* locally).
- As a food and shopping paradise both in terms of local and international brands, Singapore is home to consumers who are generally well exposed and informed. They are mostly quality conscious and price sensitive.
- Consumers in Singapore are becoming increasingly health conscious, switching to healthier food products. Consumer decisions in buying food products are often influenced by the Healthier Choice Symbol introduced by the Health Promotion Board. <https://www.hpb.gov.sg/food-beverage/healthier-choice-symbol>. More are opting for fish over red meats.
- Supermarket house brands are shedding their image of being low quality and inferior. Consumers are now more receptive towards house brands as they can have greater savings without compromising on product quality. There are some UK retailer own brand seafood products stocked in local supermarkets.
- FairPrice has more than 2,200 house-brand and private-label items, Cold Storage has more than 2,000 items and Giant has over 1,500. Sheng Siong and Prime supermarkets offer more than 400 and 137 such items, respectively.
- More businesses here are switching to sustainable seafood, with the number of certified suppliers more than tripling in recent years. An increasing number of suppliers have been given the stamp of approval by the Marine Stewardship Council.
- For a list of current suppliers of MSC- Certified Sustainable Seafood to Singapore <http://cert.msc.org/supplierdirectory/Vcontroller.aspx?Path=be2ac378-2a36-484c-8016-383699e2e466&Country=Singapore>
- Singapore hosted its first Sustainable Seafood Festival (SSF) in 2014 to heighten awareness about sustainable seafood consumption.
- On 4 October 2016 WWF launched the new Singapore Seafood Guide, which highlighted the urgency for Singaporeans to make better consumption choices as 3 out of 4 common fish species have been flagged as unsustainable. “As one of the biggest consumers of seafood in the world per capita, Singaporeans have a big role to play in protecting our oceans. The Seafood Guide empowers everyone in the supply chain to make conscious choices that prevent the further exploitation of fish stocks,” said Elaine Tan, CEO, WWF-Singapore.



Department for International Trade

- Responding to the growing crisis, Singapore's seafood industry – consisting of retailers, hoteliers, restaurants and suppliers – came together to crowdsource industry solutions at the sustainable Seafood Business Forum.
- The Forum also kick started the Responsible Seafood Group, consisting of local industry leaders such as Global Ocean Link and Marina Bay Sands. Working with WWF-Singapore, they have committed to responsible sourcing standards and will pave the way for the rest of the industry to follow suit.

Source:

The Straits Times: Sustainable seafood catching on here. July 21, 2015

The Straits Times: Growing taste for supermarket house brands: Poll. Dec 14, 2014

<http://www.wwf.sg/?279952/WWF-Singapore-launches-New-Seafood-Guide>

2.14 UK SHARE AND EXPORT OPPORTUNITIES

A) Imports of Fish & Seafood to Singapore

Values in thousands, using S\$ to GBP: 0.56632

| COUNTRY | 2015 | 2016 | 2017 | Rank |
|----------------|-------------|-------------|-------------|------|
| MALAYSIA | £ 76,325.21 | £ 81,667.87 | £ 78,973.32 | 1 |
| INDONESIA | £ 83,328.89 | £ 79,425.81 | £ 78,140.83 | 2 |
| VIETNAM | £ 55,673.22 | £ 58,454.98 | £ 65,114.91 | 3 |
| NORWAY | £ 47,274.13 | £ 58,815.73 | £ 60,245.69 | 4 |
| CHINA | £ 61,312.63 | £ 46,623.43 | £ 59,627.83 | 5 |
| JAPAN | £ 33,290.55 | £ 36,754.17 | £ 39,167.82 | 6 |
| FRANCE | £ 11,640.14 | £ 26,905.86 | £ 24,094.08 | 7 |
| INDIA | £ 22,134.62 | £ 24,213.58 | £ 23,880.58 | 8 |
| AUSTRALIA | £ 17,736.58 | £ 12,477.73 | £ 22,994.29 | 9 |
| UNITED KINGDOM | £ 14,648.43 | £ 16,640.75 | £ 20,085.67 | 10 |
| CHILE | £ 11,198.98 | £ 19,282.06 | £ 17,622.75 | 11 |
| THAILAND | £ 19,375.51 | £ 18,736.70 | £ 16,478.78 | 12 |



Department for International Trade

| | | | | |
|-----------------------------------|-------------|-------------|-------------|----|
| UNITED STATES | £ 14,944.05 | £ 13,635.29 | £ 13,370.25 | 13 |
| KOREA, REP OF | £ 7,761.42 | £ 10,559.60 | £ 8,229.20 | 14 |
| PHILIPPINES | £ 8,960.32 | £ 6,445.29 | £ 7,759.72 | 15 |
| CANADA | £ 5,927.67 | £ 6,866.06 | £ 7,695.16 | 16 |
| TAIWAN | £ 9,360.70 | £ 7,866.75 | £ 7,333.84 | 17 |
| NAMIBIA | £ 4,916.79 | £ 6,708.06 | £ 6,991.79 | 18 |
| HONG KONG | £ 8,528.78 | £ 7,289.10 | £ 6,806.60 | 19 |
| ARGENTINA | £ 4,129.61 | £ 11,454.39 | £ 6,394.89 | 20 |
| NEW ZEALAND | £ 5,404.96 | £ 6,740.34 | £ 6,006.96 | 21 |
| MYANMAR | £ 4,630.80 | £ 4,574.73 | £ 4,667.04 | 22 |
| PAPUA NEW GUINEA | £ 363.01 | £ 1,014.85 | £ 4,468.83 | 23 |
| SRI LANKA | £ 5,556.73 | £ 5,130.29 | £ 4,366.89 | 24 |
| BRITISH INDIAN OCEAN TERRITORY | £ 4,343.11 | £ 1,433.92 | £ 3,976.13 | 25 |
| URUGUAY | £ 2,463.49 | £ 2,524.09 | £ 2,955.06 | 26 |
| YEMEN | £ 1,005.78 | £ 1,444.12 | £ 2,826.50 | 27 |
| RUSSIA | £ 1,267.99 | £ 2,380.81 | £ 2,743.82 | 28 |
| IRELAND | £ 1,578.90 | £ 1,919.82 | £ 1,607.78 | 29 |
| BRAZIL | £ 691.48 | £ 1,755.59 | £ 1,456.01 | 30 |
| SEYCHELLES | £ 2,832.17 | £ 720.93 | £ 1,378.42 | 31 |
| PAKISTAN | £ 598.60 | £ 1,150.20 | £ 1,345.58 | 32 |
| GHANA | - | £ 787.18 | £ 1,244.21 | 33 |
| BANGLADESH | £ 711.86 | £ 2,097.08 | £ 816.07 | 34 |
| DENMARK | £ 929.90 | £ 911.21 | £ 812.10 | 35 |
| REUNION | £ 833.62 | £ 947.45 | £ 759.44 | 36 |
| NETHERLANDS | £ 951.42 | £ 466.08 | £ 731.69 | 37 |
| SENEGAL | £ 996.16 | £ 817.77 | £ 590.67 | 38 |
| TANZANIA | £ 2,343.43 | £ 1,876.78 | £ 517.62 | 39 |
| ECUADOR | £ 313.74 | £ 229.93 | £ 483.64 | 40 |
| PERU | £ 1,606.08 | £ 661.46 | £ 441.16 | 41 |
| GERMANY | £ 218.03 | £ 681.28 | £ 426.44 | 42 |



Department for International Trade

| | | | | | | | |
|--------------------------|---|----------|---|--------|---|--------|----|
| KENYA | £ | 702.80 | £ | 714.70 | £ | 302.98 | 43 |
| UGANDA | £ | 408.88 | £ | 304.11 | £ | 301.28 | 44 |
| SAUDI ARABIA | £ | 302.41 | £ | 608.23 | £ | 295.05 | 45 |
| ITALY | £ | 303.55 | £ | 269.00 | £ | 278.63 | 46 |
| CROATIA | £ | 233.89 | £ | 258.24 | £ | 211.80 | 47 |
| UNITED ARAB EMIRATES | £ | 49.27 | £ | 20.95 | £ | 189.72 | 48 |
| MADAGASCAR | £ | 44.17 | £ | 456.45 | £ | 170.46 | 49 |
| KOREA, DEM PEO REP OF | £ | 88.91 | £ | 99.67 | £ | 158.57 | 50 |
| MALTA | £ | 100.80 | £ | 114.96 | £ | 158.00 | 51 |
| SUDAN | £ | 1.13 | £ | 109.30 | £ | 142.71 | 52 |
| GREECE | £ | 129.12 | £ | 104.20 | £ | 134.22 | 53 |
| MALDIVES | £ | 134.78 | £ | 252.58 | £ | 122.33 | 54 |
| HONDURAS | £ | 295.05 | £ | 309.21 | £ | 117.79 | 55 |
| TURKEY | £ | 71.36 | £ | 186.89 | £ | 116.10 | 56 |
| OMAN | £ | 214.07 | £ | 228.23 | £ | 102.50 | 57 |
| ICELAND | £ | 24.35 | £ | 57.76 | £ | 91.18 | 58 |
| MOZAMBIQUE | £ | 0.57 | | - | £ | 70.79 | 59 |
| NIGERIA | £ | 69.09 | £ | 58.90 | £ | 67.39 | 60 |
| BELGIUM | £ | 10.19 | £ | 10.76 | £ | 46.44 | 61 |
| MAURITIUS | £ | 1,522.83 | £ | 132.52 | £ | 40.21 | 62 |
| SWITZERLAND | £ | 9.63 | £ | 18.12 | £ | 27.75 | 63 |
| SWEDEN | £ | 420.21 | £ | 16.99 | £ | 26.05 | 64 |
| FIJI | £ | 2.27 | £ | 9.63 | £ | 24.92 | 65 |
| FAEROE ISLANDS | £ | 580.48 | £ | 575.38 | £ | 20.95 | 66 |
| NEW CALEDONIA | £ | 18.12 | £ | 12.46 | £ | 11.89 | 67 |
| MOROCCO | £ | 1.13 | £ | 6.23 | £ | 10.76 | 68 |
| MONACO | £ | 11.33 | £ | 9.63 | £ | 8.49 | 69 |
| MEXICO | £ | 211.80 | £ | 200.48 | £ | 7.36 | 70 |
| PORTUGAL | £ | 11.33 | £ | 3.40 | £ | 6.80 | 71 |
| NICARAGUA | £ | 1,142.83 | £ | 478.54 | £ | 4.53 | 72 |



Department for International Trade

| | | | | |
|----------------------|--------------|--------------|--------------|----|
| CZECH REP | £ 19.25 | £ 3.40 | £ 3.40 | 73 |
| HUNGARY | - | - | £ 2.27 | 74 |
| LATVIA | £ 35.11 | £ 0.57 | £ 0.57 | 76 |
| BRUNEI | £ 20.39 | - | £ 0.57 | 75 |
| MAURITANIA | - | £ 2.27 | £ 0.57 | 77 |
| BELIZE | £ 235.02 | £ 278.63 | - | 80 |
| GREENLAND | £ 162.53 | £ 133.65 | - | 81 |
| EGYPT | £ 43.04 | £ 10.76 | - | 82 |
| SOLOMON ISLANDS | £ 19.82 | - | - | 87 |
| FINLAND | £ 1.70 | £ 2.27 | - | 85 |
| BELARUS | £ 1.70 | £ 1.13 | - | 86 |
| FALKLAND ISLANDS | - | £ 968.97 | - | 79 |
| PANAMA | - | £ 156.87 | - | 78 |
| BULGARIA | - | £ 8.49 | - | 83 |
| FRENCH POLYNESIA | - | £ 5.10 | - | 84 |
| | | | | |
| Others | £ 13,948.46 | £ 20,249.90 | £ 16,028.55 | |
| World / Total | £ 579,712.90 | £ 618,538.67 | £ 634,933.63 | |

- The UK ranked 10th in terms of imports of fish and seafood to Singapore in 2017, this was up from 13th in 2014. It saw a significant increase in 2017 compared with 2016 up 20.7% equating to £3,445,000.
- 12.4% of all fish and seafood imported into Singapore comes from Malaysia. 90% of imported seafood into Singapore comes from the top 20 countries, 75% from the top 10, and 25% comes from the top 2, Malaysia and Indonesia.
- The top 3 countries Singapore imported seafood from in 2017 were Malaysia, Indonesia and Vietnam. This accounted for more than a third of all seafood imports into Singapore.
- The 4th and 5th countries that Singapore imported seafood from in terms of value in 2017 were Norway and China respectively.
- China had the biggest value growth of any country, up by £13,004,000 and +28% compared with 2016. Australia saw the next biggest increase in value,



Department for International Trade

£10,517,000 vs 2016, up by 84%. This is significant when you consider that the total increase year on year for all countries was £16,395,000 (+2.65%).

- Norway, the world's second largest seafood exporter was ranked 4th in 2017 despite being situated further away from Singapore than China and Japan, which came in 5th and 6th respectively.

Source: *Enterprise Singapore* (<https://statlink.enterprisesg.gov.sg/>)

2.14 B) Imports from the UK to Singapore (All Conditions)

Values in thousands *Rounded to the nearest '000, using fx S\$ to GBP: 0.56632

| HS Code | Item | 2015 | 2016 | 2017 | Rank ¹ |
|---------|--------------------------------------------------------------------------------------------------------|---------|---------|---------|-------------------|
| 030383 | TOOTHFISH FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99S (HS 030383) | £10,648 | £12,444 | £15,508 | 1 |
| 030771 | CLAMS COCKLES & ARK SHELLS LIVE FRESH OR CHILLED (HS 030771) | £1,032 | £1,236 | £1,666 | 2 |
| 030219 | OTHER SALMONIDAE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030219) | £45 | £390 | £677 | 3 |
| 030633 | CRABS NOT FROZEN (HS 030633) | £808 | £586 | £488 | 4 |
| 030399 | OTHER FISH LIVERS ROES AND MILTS FROZEN EXCL FRESHWATER FISH (HS 030399) | £36 | £43 | £425 | 5 |
| 030541 | PACIFIC ATLANTIC & DANUBE SALMON SMOKED (HS 030541) | £300 | £211 | £286 | 6 |
| 030481 | PACIFIC ATLANTIC & DANUBE SALMON FILLETS FROZEN (HS 030481) | £269 | £244 | £181 | 7 |
| 030721 | SCALLOPS LIVE FRESH OR CHILLED (HS 030721) | £197 | £182 | £132 | 8 |
| 030632 | LOBSTER LIVE FRESH OR CHILLED (HS 030632) | £258 | £156 | £127 | 9 |



Department for International Trade

| | | | | | |
|--------|----------------------------------------------------------------------------------------------------------------|------|------|-----|----|
| 030214 | ATLANTIC & DANUBE SALMON FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030214) | £38 | £15 | £71 | 10 |
| 030471 | COD FILLETS FROZEN (HS 030471) | £8 | £39 | £64 | 11 |
| 030251 | COD FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030251) | £32 | £53 | £50 | 12 |
| 030221 | HALIBUT FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030221) | £23 | £31 | £39 | 13 |
| 030211 | TROUT FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030211) | £372 | £136 | £37 | 14 |
| 030441 | PACIFIC ATLANTIC & DANUBE SALMON FILLETS FRESH OR CHILLED (HS 030441) | £29 | £24 | £32 | 15 |
| 030284 | SEABASS FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030284) | £41 | £33 | £27 | 16 |
| 030711 | OYSTERS LIVE FRESH OR CHILLED (HS 030711) | £31 | 36 | £26 | 17 |
| 030549 | OTHER FISH SMOKED (HS 030549) | £11 | £25 | £24 | 18 |
| 030368 | BLUE WHITINGS FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99S (HS 030368) | - | - | £22 | 19 |
| 030389 | OTHER FISH EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99 FROZEN (HS 030389) | £1 | - | £21 | 20 |
| 030472 | HADDOCK FILLETS FROZEN (HS 030472) | £2 | £16 | £21 | 21 |
| 030791 | OTHER MOLLUSCS LIVE FRESH OR CHILLED (HS 030791) | £20 | £14 | £19 | 22 |



Department for International Trade

| | | | | | |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|-----|----|
| 030631 | ROCK LOBSTER & OTHER SEA CRAWFISH LIVE FRESH OR CHILLED (HS 030631) | £65 | £50 | £18 | 23 |
| 030289 | OTHER FISH FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030289) | £3 | £3 | £16 | 24 |
| 030611 | ROCK LOBSTER & OTHER SEA CRAWFISH FROZEN (HS 030611) | - | - | £14 | 25 |
| 030351 | HERRINGS FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99 (HS 030351) | - | £1 | £13 | 26 |
| 030444 | OTHER FISH OF FAMILIES BREGMACEROTIDAE EUCLICHTHYIDAE GADIDAE MACROURIDAE MELANONIDAE MERLUCCIIDAE MORIDAE MURAENOLEPIDIDAE FILLETS FRESH OR CHILLED (HS 030444) | £12 | £13 | £11 | 27 |
| 030489 | OTHER FISH FILLETS FROZEN (HS 030489) | £2 | £32 | £9 | 28 |
| 030224 | TURBOTS FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030224) | £4 | £3 | £8 | 29 |
| 030543 | TROUT SMOKED (HS 030543) | £12 | £3 | £7 | 30 |
| 030619 | OTHER CRUSTACEANS INCL FLOURS MEALS & PELLETS FROZEN (HS 030619) | - | - | £7 | 31 |
| 030542 | HERRINGS SMOKED (HS 030542) | - | - | £6 | 32 |
| 030223 | SOLE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030223) | £3 | £3 | £6 | 33 |
| 030285 | SEABREAM FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030285) | £9 | £4 | £4 | 34 |



Department for International Trade

| | | | | | |
|--------|-------------------------------------------------------------------------------------------------------|-----|-----|----|----|
| 030742 | CUTTLEFISH & SQUID LIVE FRESH OR CHILLED (HS 030742) | £7 | £6 | £4 | 35 |
| 030449 | OTHER FISH FILLETS FRESH OR CHILLED (HS 030449) | £6 | £14 | £3 | 36 |
| 030792 | OTHER MOLLUSCS FROZEN (HS 030792) | - | - | £3 | 37 |
| 030462 | CATFISH FILLETS FROZEN (HS 030462) | - | £1 | £2 | 38 |
| 030520 | LIVERS & ROES OF FISH DRIED SALTED OR IN BRINE SMOKED (HS 030520) | - | - | £2 | 39 |
| 030614 | CRABS FROZEN (HS 030614) | £32 | £87 | £2 | 40 |
| 030712 | OYSTERS FROZEN (HS 030712) | - | - | £2 | 41 |
| 030229 | OTHER FLAT FISH FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030229) | £12 | £12 | £1 | 42 |
| 030252 | HADDOCK FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030252) | £1 | £1 | £1 | 43 |
| 030254 | HAKE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030254) | £1 | £1 | £1 | 44 |
| 030772 | CLAMS COCKLES & ARK SHELLS FROZEN (HS 030772) | - | - | £1 | 45 |
| 030222 | PLAICE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030222) | - | £1 | £1 | 46 |
| 030255 | ALASKA POLLACK FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030255) | - | - | £1 | 47 |
| 030384 | SEABASS FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS | - | - | £1 | 48 |



Department for International Trade

| | | | | | |
|--------|-----------------------------------|------|----|----|----|
| | 0303.91 TO 0303.99S (HS 030384) | | | | |
| 030612 | OTHER LOBSTERS FROZEN (HS 030612) | £228 | £1 | £1 | 49 |

1. Ranked using 2017 sales value

- As 2.14 B shows, the top three seafood products from the UK in terms of value in 2017 were 1) Toothfish frozen, 2) Clams Cockles & Ark Shells live, fresh or chilled, and 3) Other Salmonidae fresh or chilled.
- The top three varieties make up 89% of the total value of imports from the UK to Singapore.
- Frozen toothfish saw the greatest increase in value in 2017 up 25% £3,064 thousand.

Source: *Enterprise Singapore* (<https://statlink.enterprisesg.gov.sg/>)

2.14 C) Fresh & Chilled Imports from the UK to Singapore

Values in thousands, using S\$ to GBP: 0.56632

| HS Code | Item | 2015 | 2016 | 2017 | Rank ¹ |
|---------|----------------------------------------------------------------------------------------------------------------|-----------|-----------|-----------|-------------------|
| 030771 | CLAMS COCKLES & ARK SHELLS LIVE FRESH OR CHILLED (HS 030771) | £1,032.40 | £1,235.71 | £1,665.55 | 1 |
| 030219 | OTHER SALMONIDAE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030219) | £45.31 | £390.19 | £677.32 | 2 |
| 030721 | SCALLOPS LIVE FRESH OR CHILLED (HS 030721) | £196.51 | £182.36 | £131.95 | 3 |
| 030632 | LOBSTER LIVE FRESH OR CHILLED (HS 030632) | £257.68 | £156.30 | £126.86 | 4 |
| 030214 | ATLANTIC & DANUBE SALMON FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030214) | £37.94 | £14.72 | £71.36 | 5 |



Department for International Trade

| | | | | | |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|--------|----|
| 030251 | COD FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030251) | £32.28 | £52.67 | £49.84 | 6 |
| 030221 | HALIBUT FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030221) | £22.65 | £31.15 | £39.08 | 7 |
| 030211 | TROUT FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030211) | £371.51 | £136.48 | £37.38 | 8 |
| 030441 | PACIFIC ATLANTIC & DANUBE SALMON FILLETS FRESH OR CHILLED (HS 030441) | £28.88 | £23.79 | £31.71 | 9 |
| 030284 | SEABASS FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030284) | £41.34 | £32.85 | £27.18 | 10 |
| 030711 | OYSTERS LIVE FRESH OR CHILLED (HS 030711) | £31.15 | £35.68 | £26.05 | 11 |
| 030791 | OTHER MOLLUSCS LIVE FRESH OR CHILLED (HS 030791) | £19.82 | £13.59 | £18.69 | 12 |
| 030631 | ROCK LOBSTER & OTHER SEA CRAWFISH LIVE FRESH OR CHILLED (HS 030631) | £65.13 | £49.84 | £17.56 | 13 |
| 030289 | OTHER FISH FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030289) | £2.83 | £3.40 | £15.86 | 14 |
| 030444 | OTHER FISH OF FAMILIES BREGMACEROTIDAE EUCLICHTHYIDAE GADIDAE MACROURIDAE MELANONIDAE MERLUCCIIDAE MORIDAE MURAENOLEPIDIDAE FILLETS FRESH OR CHILLED (HS 030444) | £11.89 | £13.03 | £11.33 | 15 |
| 030224 | TURBOTS FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030224) | £3.96 | £2.83 | £8.49 | 16 |



Department for International Trade

| | | | | | |
|--------|-------------------------------------------------------------------------------------------------------|--------|--------|-------|----|
| 030223 | SOLE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030223) | £2.83 | £2.83 | £5.66 | 17 |
| 030285 | SEABREAM FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030285) | £9.06 | £3.96 | £3.96 | 18 |
| 030742 | CUTTLEFISH & SQUID LIVE FRESH OR CHILLED (HS 030742) | £6.80 | £5.66 | £3.96 | 19 |
| 030449 | OTHER FISH FILLETS FRESH OR CHILLED (HS 030449) | £5.66 | £13.59 | £3.40 | 20 |
| 030229 | OTHER FLAT FISH FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030229) | £11.89 | £12.46 | £1.13 | 21 |
| 030252 | HADDOCK FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030252) | £0.57 | £1.13 | £1.13 | 22 |
| 030254 | HAKE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030254) | £1.13 | £1.13 | £1.13 | 23 |
| 030222 | PLAICE FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030222) | - | £1.13 | £0.57 | 24 |
| 030255 | ALASKA POLLACK FRESH OR CHILLED EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0302.91 TO 0302.99 (HS 030255) | - | - | £0.57 | 25 |

1. Ranked using 2017 sales value

- As 2.14 C shows, clams, cockles and ark shells – live, fresh or chilled, were the greatest value import into Singapore from the UK, worth £1.7 million in 2017. They grew 35% (£430,000) between 2016 and 2017.



Department for International Trade

- The second largest value import to Singapore from the UK was other Salmonidae, fresh or chilled, which grew by 74% (£287,000) from 2016 to 2017.
- Scallops and lobsters, ranked 3rd and 4th respectively, saw a decrease year on year of 28% and 19%.
- Atlantic and Danube salmon imports, fresh or chilled, increased more than 4 fold between 2016 and 2017.

Source: *Enterprise Singapore* (<https://statlink.enterprisesg.gov.sg/>)

2.14 D) Frozen Imports from the UK to Singapore

Values in thousands, using S\$ to GBP: 0.56632

| HS Code | Item | 2015 | 2016 | 2017 | Rank ¹ |
|---------|--------------------------------------------------------------------------------------------|---------|---------|---------|-------------------|
| 030383 | TOOTHFISH FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99S (HS 030383) | £10,648 | £12,444 | £15,508 | 1 |
| 030633 | CRABS NOT FROZEN (HS 030633) | £808 | £586 | £488 | 2 |
| 030399 | OTHER FISH LIVERS ROES AND MILTS FROZEN EXCL FRESHWATER FISH (HS 030399) | £36 | £43 | £425 | 3 |
| 030481 | PACIFIC ATLANTIC & DANUBE SALMON FILLETS FROZEN (HS 030481) | £269 | £244 | £181 | 4 |
| 030471 | COD FILLETS FROZEN (HS 030471) | £8 | £39 | £64 | 5 |
| 030368 | BLUE WHITINGS FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99S (HS 030368) | - | - | £22 | 6 |
| 030389 | OTHER FISH EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99 FROZEN (HS 030389) | £1 | - | £21 | 7 |



Department for International Trade

| | | | | | |
|--------|--------------------------------------------------------------------------------------|------|-----|-----|----|
| 030472 | HADDOCK FILLETS FROZEN (HS 030472) | £2 | £16 | £21 | 8 |
| 030611 | ROCK LOBSTER & OTHER SEA CRAWFISH FROZEN (HS 030611) | - | - | £14 | 9 |
| 030351 | HERRINGS FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99 (HS 030351) | - | £1 | £13 | 10 |
| 030489 | OTHER FISH FILLETS FROZEN (HS 030489) | £2 | £32 | £9 | 11 |
| 030619 | OTHER CRUSTACEANS INCL FLOURS MEALS & PELLETS FROZEN (HS 030619) | - | - | £7 | 12 |
| 030792 | OTHER MOLLUSCS FROZEN (HS 030792) | - | - | £3 | 13 |
| 030462 | CATFISH FILLETS FROZEN (HS 030462) | - | £1 | £2 | 14 |
| 030614 | CRABS FROZEN (HS 030614) | £32 | £87 | £2 | 15 |
| 030712 | OYSTERS FROZEN (HS 030712) | - | - | £2 | 16 |
| 030772 | CLAMS COCKLES & ARK SHELLS FROZEN (HS 030772) | - | - | £1 | 17 |
| 030384 | SEABASS FROZEN EXCL EDIBLE FISH OFFAL OF SUBHEADINGS 0303.91 TO 0303.99S (HS 030384) | - | - | £1 | 18 |
| 030612 | OTHER LOBSTERS FROZEN (HS 030612) | £228 | £1 | £1 | 19 |

1. Ranked using 2017 sales value

- As 2.14 D shows, toothfish at £15,508,000, were ranked first in value for frozen seafood products from the UK in 2017, accounting for 92% of the total value. It grew 25% from 2016 to 2017 an increase of £3,064,000.

Source: Enterprise Singapore (<https://statlink.enterprisesg.gov.sg/>)



Department for International Trade

2.14 E) Smoked, Dried, Salted & In Brine Imports from the UK to Singapore

Values in thousands, using S\$ to GBP: 0.56632

| HS Code | Item | 2015 | 2016 | 2017 | Rank ¹ |
|---------|-------------------------------------------------------------------|------|------|------|-------------------|
| 030541 | PACIFIC ATLANTIC & DANUBE SALMON SMOKED (HS 030541) | £300 | £211 | £286 | 1 |
| 030549 | OTHER FISH SMOKED (HS 030549) | £11 | £25 | £24 | 2 |
| 030543 | TROUT SMOKED (HS 030543) | £12 | £3 | £7 | 3 |
| 030542 | HERRINGS SMOKED (HS 030542) | - | - | £6 | 4 |
| 030520 | LIVERS & ROES OF FISH DRIED SALTED OR IN BRINE SMOKED (HS 030520) | - | - | £2 | 5 |

1. Ranked using 2017 sales value

- Pacific, Atlantic and Danube smoked salmon makes up 88% of the total value of smoked, dried, salted and in brine imports from the UK to Singapore at £286,000.

Source: *Enterprise Singapore* (<https://statlink.enterprisesg.gov.sg/>)

Potential for UK Export Opportunities by Species

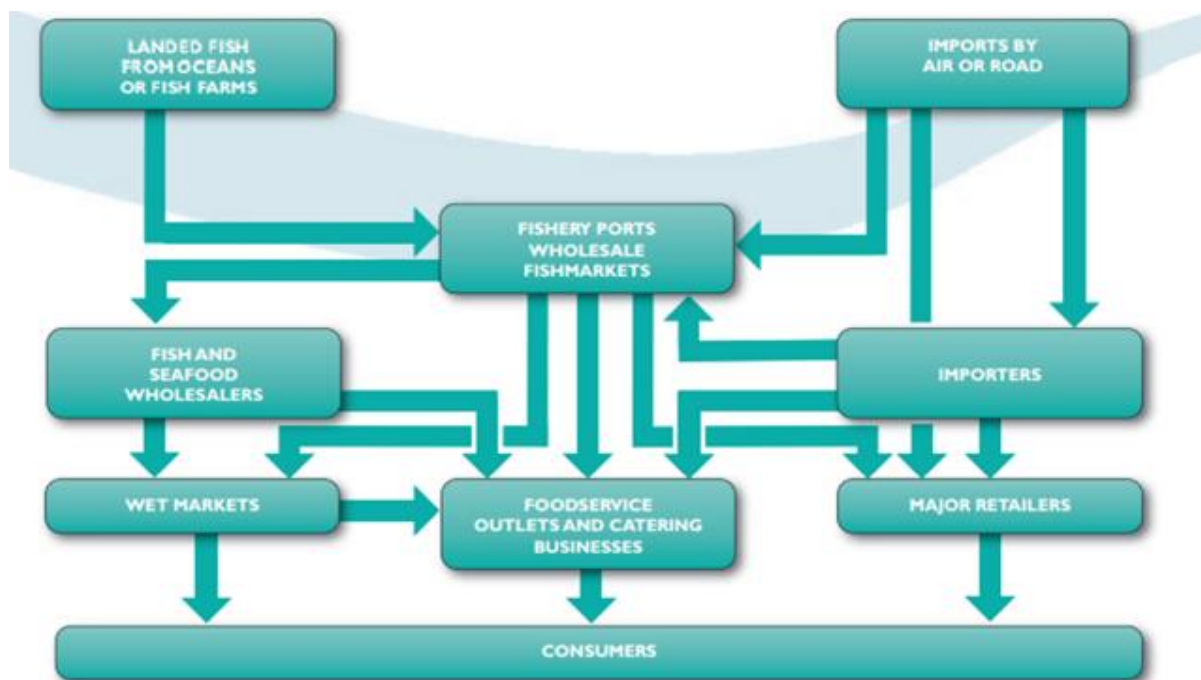
- Based on the above data of this segment, the potential for UK Export Opportunities is high for the following products:
 - Toothfish (Frozen)
 - Clams Cockles & Ark Shells (Live, fresh or chilled)
 - Other Salmonidae (Fresh or Chilled)
 - Salmon (Smoked)



Department for International Trade

2.2 BUSINESS PROFILE

2.21 THE SUPPLY STRUCTURE



- Major retailers can get their Fish and Seafood products through local importers/distributors. Large retailers can also procure directly from wholesalers. Many have their own warehousing facilities to handle a wide range of perishables. Intermediary wholesalers distribute to wet markets, hawkers and small neighbourhood stores.
- Overall, local fish farms contribute about 8% to Singapore's supply.
- As most local fish farms do not have the required facilities to transport live fish directly to the chain stores, most of Sheng Siong's live fish comes from Malaysia. The supermarket chain buys about 500kg of fresh fish daily from local farmers, mainly milkfish and mullet.
- About 10% of Giant's fish supply comes from local farms while Cold storage buys a minimal amount. Home-grown produce makes up just 5% to 10% of FairPrice's fish, and less than 5% of Sheng Siong's.
- Singaporeans generally buy fresh/chilled or frozen fish from wet markets or supermarkets as far as the retail channel is concerned. The former is usually the preferred choice for older Singaporeans, while the latter is more popular



Department for International Trade

among the young and middle aged Singaporeans, who see supermarkets as offering a quicker and more convenient shopping experience.

- Several coastal fish farms in Singapore have started or are starting home deliveries of seafood to cash in on demand. Home deliveries can help Singapore farms compete against Malaysian peers which can sell seafood cheaper to Singapore wholesalers as they have lower operational costs.
- Online shops such as The Sampan Catch and Ah Hua Kelong offer fish to households. The fish are delivered to homes on the same day they are harvested at the farm – typically within four hours.

Sources:

Appetite Publication Jan 2013

The Straits Times: Fish Supply, prices in supermarkets unaffected by plankton bloom. March 5, 2015

The Straits Times: Fish farms turn to home delivery to stave off Malaysian rivals. Oct 24, 2014

2.22 THE RETAIL CHANNEL

- The retail channel in Singapore's context comprises of supermarkets, wet markets, specialty stores, mini marts and petrol kiosks, as well as online delivery.
- Households with higher incomes tend to purchase their groceries from premium supermarkets (Fairprice Finest, Dairy Farm's Cold Storage or Market Place) and specialty stores, while lower income households generally buy from wet markets, the more affordable supermarkets (Fairprice Supermarket, Giant, Sheng Siong), or mini marts.
- As Singapore is a very small country and supermarkets are well spread and easily accessed, Singaporean consumers are more likely to purchase their groceries in person rather than online, especially fresh produce. NTUC Fairprice and Cold Storage do however, offer online shopping.
- Food and drink online retail sales in 2017, were valued at £74 billion according to Euromonitor's food and drink internet retailing report on Singapore. NTUC FairPrice is the leading online grocer. *Redmart*, is the best established online supermarket, and report strong sales growth. With consistent and reliable customer service, as well as retail discounts and rewards, they attract returning customers. Redmart, have been operating since 2011 but is now part of Alibaba



Department for International Trade

backed Lazada, and will be formally integrated into it in March 2019. Redmart offers *Sainsburys* own label products on an exclusive basis. Amazon's entry, Prime Now, is another strong competitor in the internet retail space, although they are limited in terms of products compared to Redmart. *Honestbee*, who began operating in 2015 have changed the game of online grocery retailing. It manages its grocery inventory, and employs freelancers to fill grocery requests which are delivered to customers, a sort of concierge shopping service. Honestbee has now started its own retail store, that is very technology enabled. *Amazon Fresh*, Amazon's grocery delivery service, is the latest entrant, launching in the third quarter of 2017, and set to elevate competitiveness in internet retailing.

- Older consumers still prefer to purchase seafood (mainly fish and prawns for home cooking) products from wet markets as they perceive them to be fresher; however, an increasing number of consumers are going to supermarkets for greater convenience.
- The retail sector is highly developed, competitive and dominated by a few players with three firms holding huge market share: NTUC FairPrice Co-operative, Sheng Siong Supermarket and Dairy Farm International. Among these three, NTUC is reported to hold over a third of the market share.
- Other supermarkets include Medi-Ya Singapore, an overseas branch of Medi-Ya Co Ltd and Isetan Supermarket, both from Japan. They offer a variety of local and imported products. Another well established retailer is Mustafa Supermarket, that sources internationally.
- **NTUC Fairprice**
 - NTUC Fairprice Co-operative Ltd was founded by the labour movement in 1973, with a social mission to moderate the cost of living in Singapore.
 - From one supermarket, it has grown to become Singapore's largest retailer, with 34 percent market share, serving over 600,000 shoppers daily. It has a network of over 136 outlets, comprising 112 FairPrice supermarkets, 16 FairPrice *Finest* and 8 FairPrice Xtra (hypermarkets). With its Unity Pharmacy chain, its retail footprint covers 200 stores.
 - With over 136 stores located across Singapore, FairPrice supermarkets offer quality products at best value and service to customers from all walks of life.
 - Offering extra savings, extra variety and extra fun, FairPrice Xtra Hypermarkets provide a wide variety of products and services, including a



Department for International Trade

broad range of electronic products and a good selection of casual and basic wear on top of their food fare.

- Offering a wider product assortment, value-added services and a more conducive shopping environment, FairPrice Finest is aimed at bringing the fine life closer to shoppers.
- Fairprice also has a 160-strong network of convenience stores islandwide, under FairPrice Xpress and Cheers, and serves over 100,000 customers daily.
- FairPrice Online is a virtual supermarket launched in 2002 that enables customers to shop from the comfort of their homes and have their groceries delivered directly to their doorsteps.
- NTUC FairPrice also owns a Fresh Food Distribution Centre and a centralised warehousing and distribution company.
- NTUC FairPrice is the first retail chain to implement a store-in-store concept, in partnership with Tesco from 2017. It stocks a growing range of *Tesco* branded products in dedicated shelf space at selected stores, with plans to expand further.

- **Cold Storage**

- Established in Singapore in 1903, Cold Storage is part of the Dairy Farm Group, which belongs to the Jardine Matheson Group, based in Hong Kong. The Group operates supermarkets, hypermarkets, convenience stores, health and beauty stores and home furnishings stores under well known brands.
- Cold Storage is the second largest supermarket chain in Singapore. It is also the country's oldest established supermarket operator with over 100 years of experience, setting numerous industry standards.
- Cold Storage operates 3 retail store brands – Cold Storage supermarkets, 9 (premium) Market Place stores and 4 speciality Jason's The Gourmet Grocer making up over 120 supermarket stores island wide. Each brand offers unique store concepts and experiences to cater to diverse consumer needs. It has an exclusive tie up with *Waitrose*, for its own label products.
- Cold Storage caters to the middle to upper income consumers; The Market Place focuses on the high and upper-middle income consumers; and Giant which offers fresh food and general merchandise, targets the value conscious shoppers.



Department for International Trade

➤ As of 2018, Dairy Farm's presence included the following banners:

- 52 Cold Storage supermarkets
- 9 Market Place specialty supermarkets
- 60 Giant Stores in 3 different formats (Express, Super and Hyper)

In addition, they also operate:

- 152 Guardian Pharmacy stores
- 393 '7 Eleven' convenience stores

• **Sheng Siong Supermarket**

- Established in 1985 and listed on the Singapore Exchange in 2011, they are one of Singapore's largest retailers with over S\$829.9 million in revenue for FY2017 registering a 4.2% growth. They are principally engaged in operating the Sheng Siong Groceries Chain, in 46 locations all across Singapore.
- The stores are primarily located in retail locations in the heartlands of Singapore, and designed to provide customers with both "wet and dry" shopping options, including a wide assortment of live, fresh and chilled produce, such as seafood, meat and vegetables, in addition to processed, packaged and/or preserved food products as well as general merchandise such as toiletries and essential household products.
- They have also developed a selection of house brands to offer their customers quality alternatives to national brands at substantial savings. As of the end of 2017, their vast array of housebrand offerings stood at over 900 products under 8 house brands.

• **Prime Supermarket**

- Established in 1984, Prime operates a total of 20 supermarket outlets located mainly in Singapore's public housing estates; these stores are primarily located in the heartlands of Singapore. It was one of the first supermarkets to extend its operations to 24 hours.

• **Other Retailers**

- In addition to traditional, established supermarkets, several new formats have emerged over recent years. Purely online grocers such as Redmart that offer the full range of products, to Honestbee that has expanded from delivery services in 16 cities to its first standalone store in Singapore in 2018. There



Department for International Trade

are speciality stores such as Supernature, Culina, Jones The Grocer, Swiss Butchery, etc. Some wholesalers are also setting up retail outlets such as The Seafood Market Place by Song Fish.

Industry Overview

- According to *Euromonitor*, Singapore's store-based grocery retailers continue to see strong results as consumers spend more in supermarkets. This is mostly driven by the rising cost of groceries, increased affluence especially among Singapore's middle-class as well as an increased interest in home cooking. Consumers are also buying more premium grocery products more frequently.
- Online retail sales of food and drink for 2017 in Singapore, was valued at £53.9 billion according to Euromonitor's food and drink internet retail report on Singapore. NTUC FairPrice is the leading online grocer. Redmart, is the best established online supermarket, reporting strong sales growth. Prime Now, is another strong competitor in the internet retail landscape although they are limited in terms of product compared to Redmart. Honestbee, operating since 2015 has changed the game of online grocery retailing, it manages its grocery inventory, and employs freelancers to fill grocery requests which are delivered to customers. The latest entrant in the third quarter of 2017 set to raise competitiveness in the online retail channel is Amazon's grocery delivery service, Amazon Fresh.
- Hypermarkets saw steady growth in 2017. They offer a much wider selection of household items including consumer electronics and appliances and larger family-sized packaging.
- Halal groceries - new hypermarket Big Box and chain supermarkets such as FairPrice, Giant, Cold Storage and Sheng Siong have halal-certified sections in select stores that cater to Muslim consumers. Singapore's Halal certifying body is MUIS, and UK companies who wish to export Halal products should seek certification from those bodies in the UK that are accepted by MUIS.
- Health and wellness - the Singapore Government is promoting healthy eating and living. Consumers are well informed and discerning about food ingredients, opting to buy products with reduced fat and sugar. Increasingly consumers are paying close attention to ingredients and nutritional value as well as country of origin and certification labels.
- Singapore consumers are price sensitive, yet are impulse shoppers when it comes to grocery shopping. Loyalty programs with exclusive products and



Department for International Trade

rewards such as rebates, appeal to Singapore consumers, who are attracted to price discounts and sales promotions.

- There has been an increase in specialty retail stores offering premium and/or organic and natural food products as consumers are leaning towards healthy and premium.
- There is a saturation of convenience stores, the two leading chain stores are 7-eleven and Cheers. Convenience stores in Singapore tend to offer other services such as cash withdrawals, and e-commerce payments as well, to stay competitive. Retailers reported a decline in convenience and revenue-generating staples such as tobacco and media products. As most convenience stores are located near each other, competition is fierce. In addition, they face stiff competition from supermarkets that offer products at lower and affordable prices as well as a wider range and variety.

Sources:

<http://www.coldstorage.com.sg>

<http://www.fairprice.com.sg>

<http://www.primesupermarket.com>

<http://www.shengsiong.com.sg>

https://gain.fas.usda.gov/Recent%20GAIN%20Publications/Retail%20Foods_Singapore_Singapore_6-29-2018.pdf

2.23 THE FOOD SERVICE CHANNEL

- Food & Beverage services comprise establishments engaged in the sale of prepared food and drinks for immediate consumption. The various types of food and beverage services in Singapore are:
 - **Restaurants**
 - **Fast food restaurants**
 - **Food caterers**
 - **Others**
 - Cafes, coffee houses and snack bars
 - Food courts, coffee shops and eating houses (with mainly food & beverage income)
 - Pubs (including bars)



Department for International Trade

- Other restaurants, cafes and bars
- Canteens

Hawkers and stall-holders which are not registered with the Accounting & Corporate Regulatory Authority (ACRA) are excluded. Also excluded from the group are eating and drinking places which operate in connection with the provision of lodging.

- As Singapore is known for being a food paradise, dining out is very popular, whether in hawker centres, coffee shops, food courts, fast food chains, casual or premium restaurants. Singapore consumers spent an average of S\$324 a month dining out.
- Since July 2012, the number of foreign workers a company can employ is capped at a sub-Dependency Ceiling, a quota setting the maximum number of foreign workers a firm can hire for every full time local worker it employ. Employers are faced with many challenges – high rents, stiff competition, thin margins and the labour crunch.
- In 2016, there were 7,679 establishments in the food & beverage (F&B) services industry.
- The higher end restaurants generally have demand for imported temperate/subtropical fish and shellfish.
- Most restaurants procure their supplies from wholesalers that deliver their live or fresh/chilled seafood on a daily basis. There are traditional Chinese restaurants such as Jumbo Seafood, Long Beach Seafood, and Tung Lok Seafood, local western diners like Fish and Co, as well as franchised chains such as Manhattan Fish Market from the USA and Smiths Fish and Chips from the UK.

Key Indicators of Food & Beverage Services, 2011-2016

| Type of Outlet or Service | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|-----------------------------------------------------------------------|---------|---------|---------|---------|---------|---------|
| Establishments - Total Food & Beverage Services (Number) | 6,464 | 6,672 | 6,705 | 6,871 | 7,229 | 7,679 |
| Restaurants (Number) | 2,324 | 2,430 | 2,462 | 2,495 | 2,620 | 2,712 |
| Fast Food Outlets (Number) | 401 | 439 | 444 | 463 | 488 | 477 |
| Food Caterers (Number) | 330 | 350 | 374 | 395 | 407 | 450 |
| Others (Number) | 3,410 | 3,454 | 3,425 | 3,518 | 3,714 | 4,041 |
| Operating Receipts - Total Food & Beverage Services (Million Dollars) | 7,246.8 | 7,950.9 | 8,558.2 | 8,928.8 | 8,955.8 | 9,022.8 |
| Restaurants (Million Dollars) | 2,714.1 | 3,042 | 3,399.3 | 3,516.6 | 3,509 | 3,380.2 |
| Fast Food Outlets (Million Dollars) | 903.7 | 945.4 | 973.7 | 1,060.9 | 1,072.8 | 1,098.8 |
| Food Caterers (Million Dollars) | 793.7 | 864.4 | 906.2 | 889 | 899.9 | 914.9 |



Department for International Trade

| | | | | | | |
|----------------------------------------------------------------------|---------|---------|---------|---------|---------|---------|
| Others (Million Dollars) | 2,835.3 | 3,099.2 | 3,278.9 | 3,462.3 | 3,474.1 | 3,628.9 |
| Total Food & Beverage Services (Million Dollars) | 6,921.8 | 7,599.1 | 8,261.9 | 8,668.3 | 8,675.1 | 8,747.3 |
| Restaurants (Million Dollars) | 2,665.9 | 2,986.2 | 3,354.5 | 3,476 | 3,461.1 | 3,339.6 |
| Fast Food Outlets (Million Dollars) | 878.7 | 937.4 | 970.9 | 1,055 | 1,056.9 | 1,065.3 |
| Food Caterers (Million Dollars) | 657.4 | 695.6 | 740.1 | 743.9 | 736.7 | 755.6 |
| Others (Million Dollars) | 2,719.8 | 2,979.9 | 3,196.2 | 3,393.4 | 3,420.5 | 3,586.8 |
| Operating Surplus - Total Food & Beverage Services (Million Dollars) | 528 | 574.8 | 583.6 | 569.9 | 606.3 | 620.9 |
| Restaurants (Million Dollars) | 123.8 | 146.9 | 171.9 | 180.9 | 194.6 | 202.8 |
| Fast Food Outlets (Million Dollars) | 55.5 | 42.8 | 36.1 | 45.9 | 51.9 | 73.2 |
| Food Caterers (Million Dollars) | 151.9 | 180.9 | 180.1 | 163.6 | 181.8 | 179.6 |
| Others (Million Dollars) | 196.7 | 204.1 | 195.5 | 179.6 | 178.1 | 165.4 |
| Value Added - Total Food & Beverage Services (Million Dollars) | 2,503.3 | 2,785.8 | 3,015 | 3,134.7 | 3,215.5 | 3,233.6 |
| Restaurants (Million Dollars) | 1,001.1 | 1,162 | 1,287.8 | 1,332.2 | 1,348.4 | 1,309.5 |
| Fast Food Outlets (Million Dollars) | 275.2 | 274.1 | 284.7 | 313.8 | 320.4 | 346.1 |
| Food Caterers (Million Dollars) | 329.8 | 361.2 | 386.7 | 394.3 | 402.9 | 409.8 |
| Others (Million Dollars) | 897.2 | 988.5 | 1,055.8 | 1,094.4 | 1,143.8 | 1,168.2 |

Data are classified according to Singapore Standard Industrial Classification (SSIC) 2015. Data exclude own-account workers (e.g. freelancers, hawkers and stall holders). Value added is at basic prices. Data as at Nov 2017.

SOURCE: SINGAPORE DEPARTMENT OF STATISTICS

- **Total food and beverage services** grew 6.2% from 2015 to 2016 bringing the total number of establishments in the sector to 7,279. This is stronger as compared with growth of 5.2% the previous year. There was a total growth of 18.8% between 2011 and 2016 with growth represented in all types of establishments with the exception of fast food outlets which saw a slight decline in 2016.
- **Total operating receipts** in the F&B services industry have seen continuous growth 2011 to 2017 raising from 7,247m to 9,023m, a growth of 1,776m Singapore dollars (£1,014m). Restaurants were the only sector not to see growth in this area in either 2015 or 2016.
- **Total operating surplus** of the F&B services industry increased 2.4 per cent from \$606 million in 2015 to \$621 million in 2016. On a per establishment basis, operating surplus increased 1.7 per cent to \$85,300 in 2016.
- **Total value added** generated by the F&B services industry amounted to \$3,234 million in 2016, representing an increase of 0.56 per cent compared to 2015. Value added per establishment fell 5.3 per cent to \$421,096 in 2016.



Department for International Trade

Definition of Terms

| | |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Establishment | Defined as a business or organisation unit engaged in one activity and operating in a single location. |
| Operating Receipts | Includes those arising from services rendered, commission charges, sale of goods and rental of premises, machinery and equipment. |
| Operating Expenditure | Refers to all current expenses connected to the business operations such as purchases of goods and services, remuneration, utilities and professional services. It includes depreciation and adjustment for changes in inventory. With effect from reference year 2013, research & development (R&D) expenditure is excluded from operating expenditure in line with the rebasing of the national accounts (to base year 2010) where R&D expenditure is treated as an (intangible) asset instead of an operating cost. For comparability, operating expenditure were revised from 1990 onwards. |
| Operating Surplus | Refers to the amount of operating receipts less operating expenditure plus depreciation of fixed assets. |
| Value Added (At Basic Price) | Comprises operating surplus, remuneration and taxes (less subsidies) on production. |
| Profitability Ratio | Defined as the ratio of operating surplus to operating receipts. It shows the proportion of operating receipts that is converted to profits. |
| Earnings-Expenditure Ratio | Defined as the ratio of operating surplus to operating expenditure. |

Source: *Department of Statistics Singapore*

Links:

<https://www.singstat.gov.sg/publications/industry/sssf-food-and-beverage-service>

<http://www.tablebuilder.singstat.gov.sg/publicfacing/createDataTable.action?refId=15324>



Department for International Trade

2.24 KEY REGULATIONS AND TARIFFS

The Agri-Food and Veterinary Authority of Singapore (AVA) is the government organization that oversees and regulates the import, export and transshipment of all food products. The AVA classifies food products into seven groups: meat, fish, fresh fruit, fresh vegetables, fresh eggs, processed eggs, and processed food. The imported food products are regulated and administered under relevant food safety acts and regulations.

- **Definition of 'Fish'**

Fish means any species of fish and includes crustacea, shellfish, echinoderm, mollusc, and the young and eggs thereof and fish product means (a) any fish or part thereof; and (b) any product or by-product of any fish, which is intended for human consumption.

Fresh or chilled fish

Fresh or chilled fish shall be fish which has been maintained in a wholesome condition without any part having been frozen.

Frozen fish

Frozen fish shall be fish which has been subjected to a freezing process specially designed to preserve the wholesomeness and quality of the product and maintained in a wholesome condition at a temperature of -18°C or below except during frozen storage defrosting cycles or during transfer from the delivery vehicle to the frozen fish store on frozen fish display unit. The temperature of the frozen fish shall at no time exceed -12°C .

Smoked fish

Smoked fish shall be fish which has been maintained in a wholesome condition and treated with salt and subjected to the action of smoke derived from wood that is free from paint or timber preservative or fish treated with natural smoke solutions, extracts and its identical synthetic equivalent. It may be coloured with annatto and may contain formaldehyde incidentally absorbed in processing in proportion not exceeding 5 ppm.



Department for International Trade

Salted fish

Salted fish shall be fish which has been maintained in a wholesome condition and treated with salt. It may be dried and smoked or coloured with annatto.

Fish paste

Fish paste shall be a paste prepared from one or more kinds of fish, with or without other wholesome foodstuffs, condiments and permitted colouring matter. It shall contain not less than 70% fish.

Fish cakes and fish balls

Fish cakes including fish balls shall be prepared from one or more kinds of fish, with or without starch, condiments or permitted colouring matters. They shall contain not less than 40% fish.

• Relevant Legislations

There are 3 legislations that relate to fish. They are:

- The Wholesome Meat and Fish Act
- The Sale of Food Act
- The Fisheries Act

i. The Wholesome Meat and Fish Act

The Wholesome Meat and Fish Act is an act to regulate the slaughtering of animals and the processing, packing, inspection, import, distribution, sale, transshipment and export of meat products and fish products and for matters connected therewith.

<https://sso.agc.gov.sg/Act/WMFA1999>

ii. The Sale of Food Act

The Sale of Food Act is an act for securing wholesomeness and purity of food and fixing standards for the same; for preventing the sale or other disposition, or the use of articles dangerous or injurious to health; to provide for the regulation of food establishments.

<https://sso.agc.gov.sg/Act/SFA1973#P1I->



Department for International Trade

iii. The Fisheries Act

The Fisheries Act is an act for the protection and conservation of fisheries, and to make provision for the control of fishing, the control of the marketing and distribution of fish and the use and control of fishing ports and harbours, for measures pertaining to the general welfare and improvement of the fishing industry in Singapore and for purposes incidental thereto.

https://www.ava.gov.sg/docs/default-source/legislation/fisheries-act/43web_fisheriesact

• Regulatory Information (Seafood)

- Importers and exporters of fish & fish products are required to apply for an AVA licence for Import/Export and Transhipment of Meat Products and Fish Products. The licence fee is approximately £48 per annum.
- In addition, an import permit issued by AVA is required for every consignment of fish products. The cargo clearance permit approved by AVA (Seafood) in the TradeNet® system serves as AVA import/export permit.
- When declaring a cargo clearance permit in the TradeNet® system, the product description must be clearly indicated and the product code, product quantity and product unit of measurement must be keyed into the following relevant fields:
 - i) CA/SC Product Code field - e.g. FFL0GP2R for live red Grouper
 - ii) CA/SC Product Quantity field - e.g. 1.00
 - iii) CA/SC Product Unit of Quantity field - e.g. TNE
 - iv) CA/SC Code 1 e.g. ID99999 (establishment/prefectural code)
- Fish & fish products may be imported from any country, subject to the following restrictions:
 - i. The import of chilled shucked raw oyster, chilled blood cockle meat, chilled cooked prawn/shrimp and chilled crabmeat is prohibited for food safety reasons.
 - ii. Live oysters may only be imported from countries, which meet AVA's requirements for a shellfish sanitation programme. The countries currently approved for such exports are Australia, Canada, France, Ireland, the Netherlands, New Zealand, United Kingdom and USA.
- Each consignment of live/frozen oysters, frozen blood cockle meat, frozen cooked prawns or frozen raw/cooked crab meat, must be accompanied by a



Department for International Trade

health certificate issued by the relevant authority of the exporting country, certifying the requirements as required by AVA.

- Import of the following fish species, including their parts or derivatives must be accompanied by a CITES permit from the importing and exporting countries because these species are listed under CITES.

i) CITES Appendix II:

- a. Sturgeon (*Acipenseriformes* species)
- b. Whale Shark (*Rhincodon typus*)
- c. Basking Shark (*Cetorhinus maximus*)
- d. Seahorses (*Hippocampus* species)
- e. Great White Shark (*Carcharodon carcharias*)
- f. Humphead Wrasse (*Cheilinus undulates*)
- g. Mediterranean Date Mussel
(*Lithophaga lithophaga*)

ii) CITES Appendix III

- h. Rock Sea Cucumber (*Sotichopus fuscus*) from Ecuador.

- Upon import, AVA reserves the right to inspect any imported consignment of fish and fish products. High-risk products such as frozen blood cockle meat, frozen cooked prawns and frozen raw/cooked crabmeat and frozen oysters will be subjected to mandatory inspection by AVA before sale. These products will be placed on "hold and test" pending the outcome of the laboratory analysis.
- Refer to link for list of AVA seafood product codes - [https://www.ava.gov.sg/docs/default-source/default-document-library/product-code-list-for-ahtn-2017-\(seafood\)](https://www.ava.gov.sg/docs/default-source/default-document-library/product-code-list-for-ahtn-2017-(seafood))

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

Links: <https://www.ava.gov.sg/>



Department for International Trade

2.25 USEFUL LINKS

- **Government Bodies:**

Agri-food and Veterinary Authority of Singapore

<http://www.ava.gov.sg>

Accounting and Corporate Regulatory Authority Singapore

<http://www.acra.gov.sg/>

Customs Singapore

<http://www.customs.gov.sg>

Enterprise Singapore

<https://www.enterprisesg.gov.sg/>

Singapore Department of Statistics

www.singstat.gov.sg/

- **Fish-related Associations**

Singapore Food Manufacturers' Association

www.sfma.org.sg

Seafood Industry Association, Singapore

<http://www.seafoodsingapore.org/>

Singapore Fish Merchant's General Association

<http://www.fishmerchant.org.sg/>

Institution of Aquaculture Singapore

www.aquaculturesg.org

The Institution of Aquaculture Singapore registered in April 2014. They aim to promote the development of a sustainable aquaculture industry in Singapore and beyond through collaborations and sharing of know-how and practices with international aquaculture associations and societies.



Department for International Trade

Marine Stewardship Council

www.msc.org

The Marine Stewardship Council (MSC) are an international non-profit standards programme set up in 1999 to help transform the seafood market to a sustainable basis. The MSC run the only certification and ecolabelling programme for wild-capture fisheries consistent with the *ISEAL Code of Good Practice for Setting Social and Environmental Standards* and the *United Nations Food and Agricultural Organisation Guidelines for the Eco-labelling of Fish and Fishery Products from Marine Capture Fisheries*. Worldwide, more than 15,000 seafood products, which can be traced back to the certified sustainable fisheries, bear the blue MSC ecolabel. **Headquartered in the UK, they have an office in Singapore that oversees the Asia Pacific region.**

- **Others**

World Wide Fund (WWF) Singapore – The Singapore Seafood Guide

<http://www.wwf.sg/?279952/WWF-Singapore-launches-New-Seafood-Guide>

3. NEXT STEPS

Performance & Impact Monitoring Survey (PIMS)

The Department for International Trade (DIT) is striving to provide the highest quality service to all its clients, and greatly values feedback from the businesses it has helped. In order to achieve this, the DIT has commissioned an independent market research specialist, OMB Research, to conduct surveys on its behalf. The interviews invite clients to provide frank views on both the quality and usefulness of the support provided. These surveys are conducted under the market research code of conduct, which means that all of the survey responses are strictly confidential, and reported to DIT only in anonymised aggregate form.

DIT uses the findings from these surveys to help drive quality and satisfaction improvement and to inform the focus of its trade services, to ensure they are meeting the needs of UK exporters as effectively as possible.

As Seafish Industry Authority has been a recipient of DIT's Overseas Market Introduction Service, you may be contacted by OMB research and asked to take part in the survey. Participation in the surveys is voluntary, but as this evidence is so important to informing DIT policy development, we very much hope you will be able to take part.



Department for
International Trade

4. DIT CONTACTS

Report Prepared by

Name: Valsa Panicker
Job Title: Senior Trade and Investment Manager
Location: DIT Singapore
Tel: +65 6424 4311
Email: Valsa.Panicker2@fco.gov.uk

Name: Caroline Craggs
Job Title: Trade and Investment Officer
Location DIT Singapore
Tel: +65 6424 4321
Email: Caroline.Craggs@fco.gov.uk



Department for
International Trade

5. DISCLAIMER

The Overseas Market Introduction Service ('OMIS') is provided by the Department for International Trade at the Diplomatic Service Posts overseas. Whereas every effort has been made to ensure that information provided through OMIS is accurate, DIT accepts no liability for any errors, omissions or misleading statements in such information and accept no responsibility as to the standing of any firm, company or individual mentioned. Any party interested in the goods and services provided by any company referred to in OMIS material should undertake their own research and should not consider a reference in OMIS material to be an endorsement of any goods, services or companies mentioned.

Department for International Trade (DIT)

Department for International Trade (DIT) works with UK-based businesses to ensure their success in international markets, and encourage the best overseas companies to look to the UK as their global partner of choice.

DIT has a customer commitment to helping its UK and international customers by providing a range of services, to a high standard and improve customer service by listening to customer feedback.

We also have a co-ordination role across government to establish a more systematic approach to relationships with companies which are the most economically significant investors and exporters.



Department for
International Trade

HS Cat code full descriptions relating to tables 2.12C & 2.12D

| HS Cat | Item |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0301 | LIVE FISH |
| 0302 | FISH FRESH OR CHILLED (EXCL FISH FILLETS & OTHER FISH MEAT OF 0304) |
| 0303 | FISH FROZEN (EXCL FISH FILLETS & OTHER FISH MEAT OF 0304) |
| 0304 | FISH FILLETS & OTHER FISH MEAT FRESH CHILLED OR FROZEN |
| 0305 | FISH DRIED SALTED OR IN BRINE SMOKED FISH FLOURS MEALS & PELLETS OF FISH FIT FOR HUMAN CONSUMPTION |
| 0306 | CRUSTACEANS LIVE FRESH CHILLED FROZEN DRIED SALTED OR IN BRINE SMOKED CRUSTACEANS & CRUSTACEANS IN SHELL COOKED VIA STEAMING OR BOILING FROZEN DRIED SALTED OR IN BRINE FLOURS MEALS & PELLETS OF CRUSTACEANS FIT FOR HUMAN CONSUMPTION |
| 0307 | MOLLUSCS LIVE FRESH CHILLED FROZEN DRIED SALTED OR IN BRINE SMOKED MOLLUSCS FLOURS MEALS & PELLETS OF MOLLUSCS FIT FOR HUMAN CONSUMPTION |
| 0308 | AQUATIC INVERTEBRATES EXCL CRUSTACEANS & MOLLUSCS LIVE FRESH CHILLED FROZEN DRIED SALTED OR IN BRINE SMOKED & FLOURS MEALS & PELLETS OF AQUATIC INVERTEBRATES EXCL CRUSTACEANS & MOLLUSCS FIT FOR HUMAN CONSUMPTION |