



Foodservice in Asia

2nd edition, 2001 – 2003

Singapore

“... foodservice presents new exciting business opportunities”



FOOD & BEVERAGES

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Appendices

- Appendix 1: Survey questionnaire
- Appendix 2: List of respondents
- Appendix 3: Consultant interviews
- Appendix 4: Company profiles

INTRODUCTION

For more than fifteen years, BIS Shrapnel has produced biennial studies of the Australian foodservice market. Similar studies for the New Zealand market were started seven years ago. Three years ago we started a series of reports on foodservice in Asia and covered the key markets in the region.

This volume on the Singapore foodservice market is the second edition and is part of a series of Asian studies, which now covers six countries, including Hong Kong, Malaysia, Thailand, Taiwan and the Philippines.

In 2002 a new report on foodservice in China is also scheduled.

All studies are produced on a biennial basis, so that significant market and product trends can be identified and monitored. These reports will also enable subscribers to benchmark the market performance of the more noteworthy foodservice operators in the region.

Other foodservice reports – produced by BIS Shrapnel in conjunction with our London-based associated company Arco Consulting – cover countries in the Middle East and Europe.

The markets so far covered by our foodservice research programs have a total population in excess of 240 million, and a foodservice market – valued at retail prices – in excess of US\$60 billion.

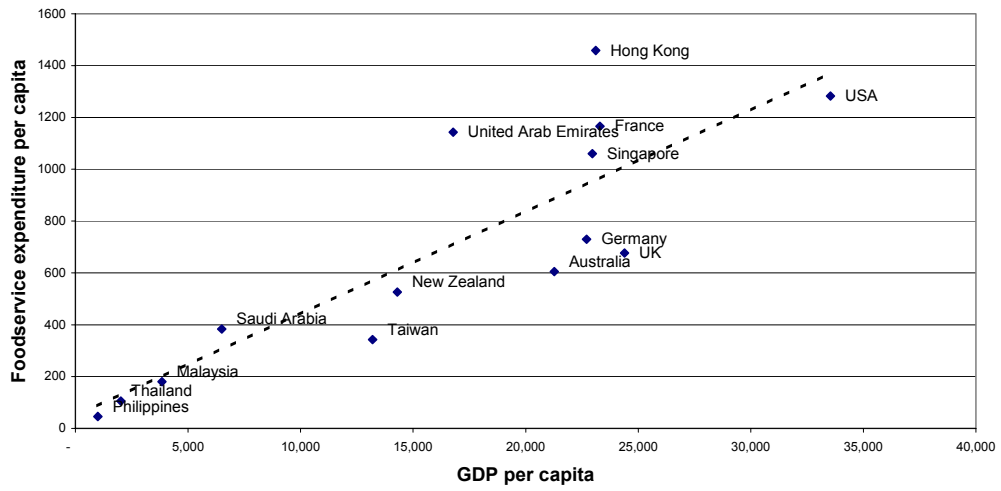
Selected foodservice markets, 2000 (values in US\$)

Country	Population (million)	GDP per head	Foodservice retail market	
			Total (billion)	Per head
Philippines	76.8	1,000	3.5	45.6
Thailand	61.7	2,020	6.5	105.3
Malaysia	23.3	3,840	4.2	180.2
Taiwan	21.9	13,200	7.5	342.5
Saudi Arabia	21.4	6,500	8.2	383.2
Australia	19.0	21,270	11.5	605.3
Hong Kong	7.2	23,110	10.5	1,458.3
New Zealand	3.8	14,300	2.0	526.3
Singapore	4.1	22,960	4.3	1,060.0
United Arab Emirates	2.8	16,780	3.2	1,142.9
Subtotal*	242.0	12,498	61.4	253.7
USA	272.9	33,540	350.0	1,282.5
Germany	82.2	22,700	60.0	729.9
France	59.2	23,300	69.0	1,165.5
United Kingdom	59.1	24,390	40.0	676.8
Total	715.4	16,351	580.4	811.3

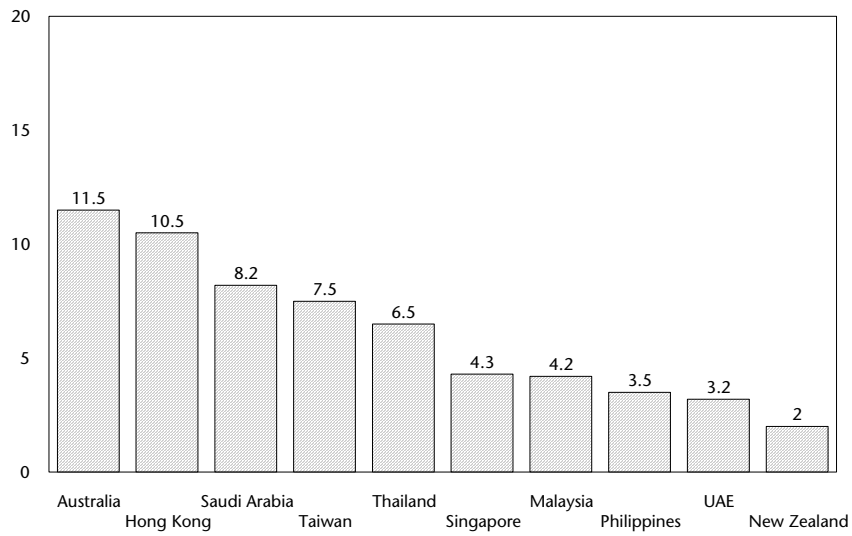
* Countries researched by BIS Shrapnel

Source: Population and GDP- Economist Intelligence Unit
Foodservice – BIS Shrapnel

Per capita GDP and foodservice expenditure in selected markets (US\$)



Selected foodservice retail markets (US\$ billion)



Our study reflects typical business plan modules, so that this information can be easily combined with internal company data to prepare individual marketing plans.

The structure of our report is as follows:

An executive summary of the key findings.

An overview of the foodservice market presented in context of the total food and beverage market/consumption.

Target markets – outlets reviews the main types of foodservice outlets both institutional (i.e. hospitals, schools etc.) and commercial (i.e. restaurants, hawkers stalls, hotels etc.).

Target markets – products provides an analysis of more than 100 food and beverage products, including the ranking of major brands/suppliers. The full product list is provided in the table overleaf.

Distribution – this chapter identifies the relative importance of wholesalers, distributors, manufacturers, and retailers, as suppliers to the foodservice industry in the distribution chain.

Competitive insight – this section reports how key suppliers are rated by foodservice operators on the issues of price, quality and product availability. Company and brand awareness are also covered in this section.

Strategic and marketing issues investigates the effectiveness of promotional activities, factors affecting the choice of suppliers and the reputation of various countries in terms of imported food products.

Outlook to 2004 – in this last chapter we identify the likely future developments of the foodservice industry in Singapore, in the light of our assessment of changes in economic and social conditions.

The interviews for this study were conducted in Singapore during the month of December 2001, by a reputable field research agency. The questionnaire was prepared by BIS Shrapnel in consultation with our subscribers. BIS Shrapnel also provided the local research agency with sample details, and our field and operations manager personally briefed the research agency. All data analysis was conducted in Australia.

A copy of the questionnaire used is attached, together with a list of respondents in Appendices 1 and 2.

Sample details are provided in the following pages.

In addition, consultant interviews were conducted with major suppliers, distributors and outlets operating in the foodservice industry. The list of interviewees is reported in Appendix 3.

All these interviews were conducted by BIS Shrapnel Senior Managers.

Survey sample profile

<i>Outlet</i>	<i>% of total</i>
<i>Institutional</i>	
Hospitals	2
Nursing homes	2
<i>Commercial</i>	
Local (mid-range & cheaper restaurants)	9
Western style restaurants	7
4/5 star restaurants	10
Local cafes	2
Western style coffee bars/cafes/kiosks	5
Western fast food chains	6
Hawker stalls & food courts	21
Caterers - airline and others	7
Tourist hotels (incl 4/5 star)	9
Boarding houses/ hostels	4
Clubs	2
Discos/karoakes	6
Bakeries	2
Convenience stores	6
<i>By position of respondent</i>	
Owner/manager	77
Assistant purchasing manager	6
Shop assistant	4
Purchasing manager	4
Cook/chef	3
Store manager	2
Marketing manager	2
Operation manager	2
Total	100

Fast food chains interviewed

<i>Outlet</i>	<i>%</i>
McDonald's	33
KFC	33
A&W Restaurant	17
Burger King	17

The following tables provide details of the food and beverage products purchased by respondents covered by our survey.

Meat, poultry and fish	
Beef – fresh/frozen	Other meat types
Pork – fresh/frozen	Fish/seafood – fresh/frozen
Lamb – fresh/frozen	Fully prepared beef products
Poultry – fresh/frozen	Fully prepared chicken products
Fruit and vegetables	
Fresh fruit and vegetables	Potatoes – frozen
Canned fruit	Mashed potato – powder mix
Canned tomatoes	Other frozen vegetables
Canned beans	Dried fruit
Other canned vegetables	
Breads, pasta, cereals and biscuits	
Bread – fresh/frozen	Rice
Biscuits	Pasta
Breakfast cereals	Pastries
Noodles	Pre – mixes for cakes
Flour	
Prepared meals, snacks and soups	
Soup - canned/liquid	Baked beans
Soup - powder/dehydrated	Canned meals - other
Frozen soups	Frozen complete meals
Canned spaghetti	
Dairy products	
Milk – fresh, regular	Cream
Milk – fresh, low fat	Cheese
Milk – fresh, flavoured	Butter
Milk – UHT, regular	Ice cream
Milk – UHT, low fat	Yoghurt
Milk – UHT, flavoured	Creamer
Milk – powder	Sweetened condensed milk
Beverages (hot and cold)	
Carbonated drinks (excl mineral water)	Tea bags – Chinese (all types)
Coffee – instant	Tea leaves
Coffee – ground/beans	Tea – powder dust
Coffee – ready to drink	Tea – ready to drink
Fresh fruit juices (packaged)	Milo
Juice from concentrates	Hot chocolate (powdered)
Mineral water	Iced tea
Tea bags - black	Rose syrup

Fats and oils	
Frying oils/fats	Margarine
Salad oils	Ghee
Sesame oil	Olive oil
Sauces and condiments	
Clear salad dressing	Tomato sauce/ketchup
Other salad dressing	Tomato paste/puree
Vinegar	BBQ sauces
Cooking chocolate/blocks	Other sauces
Chilli – sauce	Other condiments
Chilli – paste	Spaghetti/pasta sauces
Fish sauce	Other prepared sauces
Mayonnaise	Stock powder – chicken/beef
Mustard	Stock powder – anchovy/ikan bilis
Oyster sauce	Liquid stock – chicken/beef
Sugar	Liquid stock – anchovy/ikan bilis
Soy sauce	Stock paste – Tom Yum
Spreads and jams	
Jams – any type	Peanut butter
Marmalade	Chocolate spread
Honey	Cheese spread



Note: All values are in Singapore dollars (S\$) unless otherwise indicated. The exchange rate used to convert the local currency into US dollars is S\$ 1.80 = US\$1.



Foodservice in Asia

- Malaysia
 - Singapore
- 2nd edition, 2001–2003



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e-mail: srosengren@bis.com.au

or post to: BIS Shrapnel Pty Limited
Level 8, 181 Miller Street
North Sydney NSW 2060
Australia