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Global Agricultural Information Network

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## Singapore

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**Report Highlights:**

Singaporeans love seafood, not to mention a fair share of 16.4 million visitors in 2016 who together rang up sales valued US\$1.07 billion for imports. The U.S. share was 1.8% or US\$20 million. American lobsters, oysters, cod and sword fish, sock-eye salmon, scallops, mussels and clams are popular and offer the best potential. There could be opportunities to supply U.S. fish such as Alaskan Pollack, to manufacturers of high quality fish balls, surimi and other processed seafood products. It's also worth looking into the feasibility of developing a market for other types of U.S. seafood such as various carps, Dogfish, Ocean Perch, Sheepshead, Bigmouth Buffalo, Skate and Ocean Perch.

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## **SECTION I: MARKET OVERVIEW**

### **Singapore's Profile:**

Singapore is one of the most affluent markets in Southeast Asia, with a population of 5.6 million, and a GDP per-capita of US\$52,960 in 2016. It is the key location for expatriate families to reside in East Asia. Singapore is considered a city state made up of largely middle income households leading a comfortable lifestyle. Today, Singaporeans continue to represent a sizeable pool of active consumers who will continue to drive increased consumption of imported food and beverages into the future. The Hotel, Restaurant and Institutional (HRI) sector, a vibrant sector currently services the population and the 16.4 million tourists and business visitors in 2016. Tourism receipts (accommodation, shopping, sightseeing and gaming and food and beverage) totaled US\$18.3 billion, 12% or US\$1.6 billion were food and beverage receipts.

Singapore is a highly developed market economy and the third largest economy in Asia after Qatar and Macau in terms of GDP purchasing power parity. Strategically located in the middle of key trade flows from Asia, Australia, Europe, the Middle East and the United States, it is one of the world's most open economies and is highly dependent on international trade, imports almost 90% of its food requirements with virtually no local agricultural production. According to the latest 2017 World Bank's annual ratings, Singapore ranks second among 190 economies, behind New Zealand, in the ease of doing business. There are no import tariffs or excise taxes for all food and beverages (except for alcoholic beverages and tobacco products), but a Goods and Services Tax (GST) of 7% is levied for all goods and services at the point of distribution.

### **Fish and Seafood Market Overview**

In 2016, Singapore imports of agriculture, fish and forestry products totaled \$11 billion, the United States was the fourth largest supplier with a market share of 8% valued at US\$872 million in total. In the Fish and Seafood product category, Singapore imported a total value of US\$1.07 billion or 193,700 metric tons in 2016, the United States' share was 1.8% or US\$20 million. Most of the fish and seafood products are mostly imported from China – US\$139 million or 20,543 metric tons, Malaysia – US\$135 million or 43,812 metric tons, Indonesia – US\$110 million or 31,995 metric tons and Vietnam – US\$ 104 million – 32,599 metric tons, Norway – US\$75 million – 8,685 metric tons and Japan – US\$58 million or 2,776 metric tons.

Singapore's fish and seafood market continues to be dominated by imports. According to the latest World Wide Fund for Nature (WWF) new Singapore Seafood Guide (that evaluates over 40 popular seafood species in Singapore according to an international methodology), Singaporeans consume about 22 kg. fish and seafood per person yearly, more than the global average of 20 kg. and quite a contrast with Americans, with a consumption of only 5.1 kg. fish and seafood per person.

Singapore's fish and seafood supplies about 95% come from neighboring countries or the "Coral Triangle" (geographical term, refers to a triangular area of the tropical marine waters of Indonesia, Malaysia, Papua New Guinea, Philippines, Solomon Islands and Timor-Leste). The common and popular fish available in the market place are salmon (mostly Norwegian and New Zealand), codfish,

threadfin, silver pomfret, red grouper, Spanish mackerel (batang), seabass, snappers, milkfish, green mussels and crustacean, i.e. shrimp and mangrove crabs. Local freshwater fish farms produce species like snakeheads, tilapia, catfishes and carps and other cyprinids.

According to the WWF report, Singapore consumers are taking fish out of the ocean faster than they can be replenished, and if left unchecked, fish stocks will collapse. WWF is addressing this threat through working with retailers, hotels, restaurants and traders to raise awareness of sustainable seafood that is farmed and/or fished responsibly. The report also reviewed that 75% of the seafood consumed in Singapore is not responsibly caught. They are the fish varieties that are found in everyday hawkers (local food vendors) such as *nasi lemak* (rice cooked in coconut milk with yellowbanded scad or “ikan kuning” – Malay name), Indian threadfin (commonly known as “ikan kurau” – Malay name) and silver pomfret used in local fish porridge and/or steamed and pan/deep fried.



### **Majestic American King Crab and offered at a Chinese restaurant**

(Source: FAS Singapore)

### **Trends**

- The availability of a diverse range of cuisine in Singapore speaks for Singaporeans’ passion for food. Consumers and expatriates can often eat in a wide range of different food service outlets. They love their fish and seafood products even more, it is one of the most popular food product consumed in Singapore. Per capita consumption is about 22 kg. yearly. Their favorites include fish, prawns, crabs, salmon, lobsters and abalone.
- Singaporeans are well-traveled and adventurous when it comes to trying out new and exotic fish (seasonal and limited quantity) and seafood dishes. However, they will only try new fish and seafood dishes prepared by a reputable chef from a well-known/popular restaurant. Singapore consumers are less adventurous when it comes to home-cooking, specifically in cooking fish and seafood products.
- Singaporeans are increasingly health conscious and lean towards selecting healthier food products, influenced by the Singapore Health Promotion Board “healthier choice” logo. They are

opting for fish over red meats.

- Singaporeans are dining out more because of busier lifestyles, increase in dining options, and word-of-mouth recommendations via social media.
- Third party delivery service such as “Food Panda”, “Deliveroo”, “Uber Eats” offer consumers the convenience of on-demand delivery with choices from major seafood eateries such as the *The Manhattan Fish Market, Fish & Co*, and Chinese restaurants such as *Jumbo Seafood Restaurant, Imperial Treasure Group* and the *Paradise Group*.
- They prefer fresh/chilled fish and seafood to frozen fish and seafood. Preference of live fish and seafood if available at a competitive price, but are very price conscious and sensitive.
- They are generally suspicious of the quality of frozen fish and seafood. However, this is slowly changing as a result of ongoing promotion efforts undertaken by the local Singapore Government’s Health Promotion Board and retail stores to create awareness that frozen fish and seafood are better choices, good and not so expensive.
- Generally they avoid non-traditional processed fish and seafood and other frozen ready-to-cook or ready-to-eat fish and seafood products mainly because of their preference for the fresher and wholesome taste of fresh fish and seafood.
- Singapore businesses are switching to sustainable seafood. Singapore suppliers that have been given the stamp of approval by the Marine Stewardship Council (MSC) and are available on their website on: [https://www.msc.org/where-to-buy?set\\_language=en](https://www.msc.org/where-to-buy?set_language=en)

Trade sources indicated that about 80% of the fish and seafood consumed in Singapore are “warmwater” species (water temperature is about 80<sup>0</sup>F or 27<sup>0</sup>C, contains less oxygen in the water and is less fatty compared to the coldwater fishes) with only about 20% coldwater species (water temperature of about 50 to 60<sup>0</sup>F or 10 – 16<sup>0</sup>C and are more fatty as the fishes need the fat to keep warm). Most Singaporean consumers prefer warmwater fish and seafood. This is because the consumers:

- Are familiar with warmwater fish and seafood.
- Used to the texture of warm waterfish and seafood (less fatty, and falls apart easily).
- Know how to prepare and cook warmwater fish and seafood.

Popular fish and seafood commonly purchased by local consumers include groupers, threadfin (ikan kurau in Malay) sea bass, snappers, milkfish, tilapia, black, and silver pomfret, prawns and shrimps, mud crabs, green mussels and clams which are all warmwater fish and seafood.

Most Singaporean consumers do not know:

- The names or species of coldwater fish and seafood. Most consumers avoid unfamiliar fish and

seafood.

- How to prepare or cook coldwater fish and seafood. Not all coldwater fish and seafood can be successfully prepared using local recipes mainly because they are unsure of the cooking time.
- The taste and texture of coldwater fish and seafood.

The following table summarizes the advantages and challenges that face U.S. exporters of fish and seafood in Singapore.

Advantages	Challenges
<p>Singapore's economy continues to grow, and the fish and seafood market continues to expand. Imported fish and seafood products are exempt from import duties.</p>	<p>Asian suppliers dominate the market with their warm water fish and seafood that are preferred by local consumers.</p> <p>Competing country suppliers of coldwater fish and seafood from Norway, Chile, Canada, Australia and New Zealand continue to be strong competitors in the market. Their products compete on quality and price against a number of comparable U.S. products.</p>
<p>Singaporeans love to consume fish and seafood products. They are adventurous when it comes to trying out new and exotic fish and seafood dishes. On the other hand, they will only try new fish and seafood dishes prepared by a reputable chef from a well-known restaurant. This is because Singaporeans are less adventurous when it comes to cooking at home, including cooking fish and seafood products.</p>	<p>Local consumers are not familiar with coldwater fish and seafood and therefore avoid such products from the retail sector.</p>
<p>The high-end food service sector is the major distribution channel for coldwater fish and seafood. Chefs compete against each other to create exotic fish and seafood dishes during the peak dining seasons to draw customers to their restaurants.</p>	<p>The United States is a known supplier of Alaskan King Crab, Boston lobster, oysters, and scallops, but not other seafood such as cod, wild caught salmon, halibut and other types of seafood.</p>

## SECTION II: MARKET OPPORTUNITIES AND THREATS

### Market prospects in the food service sector

- Singaporeans love dining (and will find an occasion to dine and to celebrate; for example during birthdays, anniversaries, and gatherings) are adventurous in trying out special or exotic seafood not found in the local retail supermarket stores or wet markets. Exotic seafood (seasonal and

limited availability and quantity and expensive) such as Alaskan King Crab, Maine Lobster, Boston Lobster, jumbo size scallops and oysters are some examples.

- Good sales potential exists particularly for price competitive exotic coldwater fish and seafood targeted at the high-end full service restaurants, especially high-end Chinese restaurants, seafood restaurants and high-end hotel restaurants. All species of American lobsters, jumbo size scallops, cod fish, oysters have good potential.
- A vibrant HRI sector. The Hotel, Restaurant and Institutional (HRI) sector, services the population and the 16 million tourists (2016) and business visitors annually, tourism receipts in food and beverage totaled US\$1.6 billion. Opportunities exist to develop new demand for America's high quality exotic seafood such as American lobsters, mussels and clams, cod and sock-eye wild salmon, and other crustaceans that are not commonly supplied in Singapore, targeted at the high end Chinese full service restaurants and seafood restaurants.



**King Crab is popular in high-end Chinese Seafood restaurant. Steamed in egg white and Chinese wine. (left), and deep fried crab legs in salted egg yolk batter (right)**

**One 1.5 kg. crab including taxes for the above preparations cost US\$ 700 – 900.**

*(Source: FAS Singapore )*

### **Market prospects in the Retail Food Sector**

Although fish and seafood is extremely popular with Singapore consumers, they are not familiar with coldwater fish and seafood such as salmon, trout, halibut and cod. They generally do not know what to expect in terms of taste and preparation methods so they tend to avoid buying such products in the retail stores. There are good sales prospects for coldwater fish and seafood that can easily be prepared using local recipes.

The United States could plan a program (similar to a certain Scandanavian country's Salmon Board program) through marketing efforts such as taste tasting in retail stores, price reductions, cooking/education workshops, and working with local chefs in application in local cuisines, in gaining

consumer acceptance of frozen fishes such as the salmon, trout, halibut and cod.



**Fish balls (lower right) are wildly popular. There were 10 stalls selling fish balls at this wet market.**  
(Sources: FAS Singapore)

### **Market prospects in the Food Processing Sector**

The sector presents little opportunity, mainly because Singapore manufacturers are highly cost conscious and purchase competitively priced fish and seafood ingredients from neighboring countries. The main demand by this sector is for fish meat or surimi for further processing into fish balls, crab stick, and “*yong tau foo*” (vegetables and soybean puffs stuffed with fish paste from local warmwater fish such as the “*batang*” or mackerel). However, it is worth a look into the possibility of supplying U.S. fish such as Alaskan Pollack which could meet a niche market for high quality fish balls and other seafood products.

### **Market sector Opportunities and Threats**

A number of local importers are involved in importing fish and seafood into Singapore. Most of these importers have developed strong distribution links in the food service sector. Only a small number of importers have the experience and capability to import live fish and seafood into Singapore.

- The retail food sector such as hypermarkets, supermarkets and wet markets and online grocery/seafood retailing. This sector has a higher demand for local fish and seafood but low demand for coldwater fish and seafood. The quantities and varieties of fish and seafood carried by these retail outlets vary depending on the seasonal availability. Supermarkets tend not to carry large quantities of chilled or frozen fish and seafood. Supermarkets that carry high quality fish and seafood products include *Fairprice Finest, Cold Storage, Giant, Medi-Ya, and Isetan*.
- Sometimes there is mislabeling of fish names due to lack of training, i.e., cod steak should really be labeled as sea bass or black cod should be labeled sable fish. Matching up the scientific name with both the common name and picture would help retailers identify the fish correctly.
- The food service sector. This sector demands high volumes of imported warmwater and coldwater fish and seafood. Full-service family style restaurants are the main distribution channel for coldwater fish and seafood. Important channels include high-end Chinese restaurants, seafood restaurants and high end hotel restaurants. Seasonal demands exist with peak demand occurring during the Chinese New Year period, corporate functions around the



year-end and the wedding season in September.

- Point to note: The main demand for coldwater fish and seafood is from the food service sector, particularly full service restaurants, for example, those operated by high-end hotels such as the *Marina Bay Sands, Ritz Carlton, St. Regis, Four Seasons*, etc.; high-end Chinese restaurants and seafood restaurants, such as the *Jumbo Group of Seafood Restaurants, Long Beach, Palm Beach, Imperial Treasure Group of Restaurants* and the *Crystal Jade Group of Restaurants*. These restaurants strive to offer their middle to high income customers unique and exceptional fish and continually seek unusual and exotic fish and seafood products (seasonal and limited availability and quantity and expensive) to tempt and excite their customers, particularly in the peak dining season during the festive months from November to February each year, especially during Christmas, and the Lunar Chinese New Year, and during the wedding season (the auspicious 8<sup>th</sup> month of the Chinese calendar) which usually falls in September.
- A small number of western-style restaurants include fish and seafood in their menus as well as some higher end food courts that offer local dishes that include fish and seafood such as fish fillets, tilapia, silver pomfret, crabs, lobsters, prawns and shrimps.
- The low end food service sector, mainly made up of cooked food hawker centers (local food vendors) and low end restaurants and coffee shops, demands high volumes of low end local fish and seafood products.

The food service sector demand differs, depending on the target consumers of the food service outlets:

- Specialist fish and seafood restaurants such as those located in 5-star hotel properties such as the *Marina Bay Sands, Ritz Carlton, Shangri-La Hotel, W Hotel, Marriott*, etc. demand a wide variety of fresh and chilled products as well as live products, especially premium/exotic products such as geoduck, crabs, oysters, clams, scallops, abalone, lobsters, etc. This could be filled by U.S. large sized scallops, oysters, lobsters, and cod.
- High-end full service Chinese restaurants and high end hotel restaurants have a demand for premium live, fresh and chilled seafood product. Most salmon imports (fresh, chilled, frozen and smoked), fish fillets, trout, cod, mackerel and alike, are distributed to these restaurants. A local and large Chinese restaurant group such as *Jumbo Seafood Group Restaurants* source directly from suppliers. These establishments also demand seafood such as oysters, clams, lobsters, scallops, abalone, crabs, etc.
- Most food courts and other food center, coffee shops and the like demand lower cost products such as local fish, fish meat, prawns and shrimps. Little demand exists for coldwater fish or seafood such as cod, crabs and oysters.
- Demand for premium fish and seafood products increases over the Chinese New Year celebrations when such products are in great demand. Weddings, birthday celebrations, corporate functions and other special occasions also call for expensive fish and seafood dishes to be included in the menu.



**(From left to right) Raw oysters served at a high-end Chinese restaurant, (costs @ US\$8 – 10 per oyster); oyster stirred fried with spring onions and minced garlic and chilli (costs @ US\$8-10 per piece) ; raw oysters served at a lounge/bar (costs @ US\$2.5 - 5.00 per oyster depending on type F&B outlet.**

*(Source: FAS Singapore)*

#### **a. Entry strategy**

U.S. exporters should consider targeting high end Chinese restaurants, seafood restaurants and hotel restaurants because these are the main users of coldwater fish and seafood products. U.S. exporters should consult with FAS Singapore’s *GAIN Hotel, Restaurants and Institution (HRI) sector report* for detailed information.

The following are points to note when planning to enter this food service market:

- Review what the United States has to offer, how its fish and seafood products can be used in the Singapore market in comparison to similar imported product/competitors, for example educating consumers that U.S. salmon are wild, not farmed like from other countries.
- Gain a full understanding of the purchasing needs and purchasing criteria of local users in order to closely meet their expectations (such as consumer preference for fresh seafood). For example, in Chinese high-end restaurant applications and/or users.
- Develop links with local importers that target key hotels, high end restaurants and major seafood restaurants that demand imported fish and seafood. There are a good number of local food service suppliers who import premium seafood products who breaks the bulk and supply to high-end Chinese and Western restaurants.
- Be able to meet a smaller order versus a container load of frozen seafood.
- Improve local users’ and importers/local agents’ awareness and knowledge of U.S. fish and seafood by showcasing to the high-end food service sector what the U.S. exporters have to offer in terms of exotic fish and seafood for use and application in the various high-end food service channels. This could be achieved through special flown-in guest American Chefs, who could educate local chefs on the taste texture of U.S. premium/quality and education on profiles of

U.S. seafood.

- Conduct regular U.S. food and beverage promotions such as “Savor Fresh Catches from the United States” type promotions where specific seafood are promoted especially during the year-end festive seasons, in partnership with major hotel restaurants and high-end full service restaurants, particularly Chinese seafood restaurants and Western restaurants.
- Combine wine pairing demonstrations with seafood promotions.
- Look into promoting lesser known American fish including carp (eg., Common/Yellow Carp, Grass Carp and Asian Silver Carp), Dogfish, Ocean Perch, Sheepshead, Bigmouth Buffalo, Skate (stingrays) and Ocean Perch.in collaboration with unique recipes developed by famous Singaporean chefs. Chinese like the meat of Common Carp and the head of the Asian Silver Carp. Skate is found in Singaporean hawker stalls grilled with spicy herbs with the skin off. Dogfish bones are used for soup.
- Conduct a tribal promotion featuring American Indian tribes, their culture, art, dance, and seafood which they are interested in exporting such as halibut, tuna, salmon and crab.
- As a reference, FAS Singapore had successfully conducted a U.S. Seafood Promotion last September and another through a Global Based Initiative (GBI), six Cooperator U.S. Seafood Trade Mission: Alaska Seafood Marketing Institute, Food Export Association of the Midwest, Food Export USA Northeast, Intertribal Agriculture Council, Southern United States Trade Association and the Western United States Trade Association just this September 10-14, 2017. Both programs targeted Singapore trade importers, food service suppliers and hoteliers and offered “Taste and Experience U.S. Seafood. The main objective of both programs were to build awareness about the availability of U.S. seafood and to highlight the United States as a respected and reliable supplier recognized the world over for sustainable, safe and high quality fish and seafood.
- The events showcased fresh oysters such as the Pacific, Kumamoto, Shigoku, and Fat Bastard, fresh clams, mussels from Western Washington State; fresh jumbo sea scallops from Georges Bank, Maine; Atlantic halibut; and Alaskan king crab legs. Both events offered the gastronomic experience through a seafood feast.



Left  
to  
right:

**Alaskan King Crab, Atlantic Halibut and Maine Scallops served Western style**

*(Source: FAS Singapore)*

## b. Distribution channel

Live, fresh, chilled and frozen fish and seafood products are imported by specialist local importers for distribution to the retail and food service sectors in Singapore. Live products are air-freighted into Singapore. Some of the small high-end seafood restaurants buy unique products from local food service suppliers who source directly from overseas suppliers. The bigger seafood restaurants such as the Jumbo Seafood Group of Restaurants source directly from overseas suppliers. The high-end food service segment is the main user of coldwater fish and seafood.

The chart below provides an overview of the distribution channel for imported fish and seafood from U.S. exporters to both the retail food sector and food service sector.



Singapore's food regulatory body, Agri-Food & Veterinary Authority of Singapore (AVA) operates two fishing ports at Jurong and Senoko. The following are typical services provided to foreign and local fishing vessels:

- bunkering
- discharging
- transshipment of fish
- marketing and fishing harbor activities



- wholesale market for fish

However, the function of the fishing ports to facilitate trade and distribution of fish and seafood. And thus, the maintenance of cleanliness and sanitation of the ports and the wholesale markets are outsourced to a managing agent, and users of the ports are required to pay a fee.

## **Local seafood at a wet market**

*(Source: FAS Singapore)*

### **c. Competition in the market**

Malaysia and Indonesia dominate the supply of warmwater fish and seafood to Singapore. Other major suppliers of warmwater fish and seafood include Thailand, Vietnam, Myanmar, China and India.

Competing supplier country for coldwater fish and seafood include Norway, Canada, New Zealand, Australia, Chile and Spain. The United States is a major supplier of live, coldwater fish, frozen cod, frozen trout, frozen mackerel, and lobsters.

The United States' major competitors include:

- Norway (frozen salmon, frozen mackerel, smoked fish).
- Chile (frozen trout, fish fillets, smoked fish, oysters, caviar and other fish eggs).
- Canada (frozen mackerel, lobsters, oysters and other invertebrates).
- New Zealand (mussels and other invertebrates).
- Australia (other frozen fish, lobsters).
- Spain (other frozen fish).
- United Kingdom (other invertebrates).

## **SECTION III: DISTRIBUTION CHAIN COSTS**

The cost of imported fish and seafood incurred along the distribution chain in Singapore varies, depending on the type and seasonality of fish and seafood, and or premium/exotic species. Generally, the more exotic the product, the higher the retail of the product. For example, a 3 kg. (6.6 lbs.) live/fresh Alaskan King Crab costs approximately US\$300 (or more) at the seafood specialty store.

Costs along the distribution chain include the following:

- Import fee
- Fees and charges by AVA for inspection and laboratory analysis, if any, which can vary depending on the tests involved.
- Goods and Service Tax calculated at 7% on the landed costs, which are based on cost, insurance and freight.

- Importers' handling fee, which is variable and negotiable.
- Importers' margin of between 10% and 50% on fish and seafood products, the level of which depends on whether the product is a high risk product.
- Retailers' margins of up to 50%, the level is dependent on the type of product/high-end specialty.

One of the key challenges in Singapore is the impact of the hot and humid climate which can pose a big problem, as improper handling will cause the product to perish. Fish and seafood products have to be stored and distributed under temperature controlled conditions to prevent any deterioration in the quality. Trade sources comment that distribution of fresh, chilled and frozen products require cold room/chiller storage facilities and refrigerated trucks. Live products require specialist equipment and additional care and attention. All these factors result in additional costs along the distribution chain.

#### **SECTION IV: MARKET ACCESS/REGULATIONS**

Singapore is essentially a free port. No import duties are levied on imported fish and seafood. A Goods and Service Tax (GST) of 7% is levied and must be paid by the Singapore importer before products can enter Singapore. Products imported into Singapore must be in compliance with the relevant food legislation/regulations, which are enforced by the Agri-Food and Veterinary Authority (AVA).

Singapore importers are required to apply for AVA trader's license for Import/Export and Transshipment of Meat Products and Fish Products before any consignment of fish and seafood products can be imported.

Fish and seafood do not have to be halal certified.

The following are AVA legislation related to the import of fish and seafood products:

- Wholesome Meat and Fish Act
- Sale of Food Act
- Food Regulations

Fish and seafood may be freely imported from any country into Singapore. However, for food safety reasons, the AVA closely monitors certain fish and seafood products imported into Singapore. Specific import requirements apply to the following high risk seafood:

- Chilled shucked raw oyster, chilled cockle meat, chilled cooked prawn/shrimp and chilled crab meat is prohibited from import by the AVA for food safety reasons.
- Live oysters can only be imported from approved countries by AVA. They include:
  - the United States
  - Australia
  - Canada
  - France
  - Ireland

- f. The Netherlands
- g. New Zealand
- h. United Kingdom.

- Every consignment of live/frozen oysters, frozen blood cockle meat, frozen cooked prawns or frozen raw/cooked crab meat, must be accompanied by a Health Certificate issued by the relevant authority of the exporting country, certifying that Singapore's animal health and food safety requirements have been complied with.
- Each consignment of frozen oysters, frozen blood cockle meat, frozen cooked prawns and frozen raw/cooked crab meat will be subjected to mandatory inspection by AVA before sale. Other types of food imports may also be subjected to inspection by AVA. Sampling for laboratory analysis may be required.

Further information is available on the Agri-Food and Veterinary Authority website at:  
<https://www.ava.gov.sg/explore-by-sections/food/bringing-food-into-singapore-and-exporting/commercial-food-imports>

U.S. exporters who are interested in the Singapore market should also refer to the latest FAIRS Report which is available for downloading online via the USDA/Foreign Agricultural Service web portal at [www.fas.usda.gov](http://www.fas.usda.gov). Or they may consult with the Foreign Agricultural Service (FAS) Singapore Office for additional details on the local regulatory requirements for export into Singapore (see below)

## **SECTION V: POST CONTACT AND FURTHER INFORMATION**



Office of Agricultural Affairs  
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Tel: (65) 6476-9289  
Fax: (65) 6476-9517  
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For more information on exporting U.S. agricultural products to other countries, visit the U.S. Department of Agriculture's (USDA) Foreign Agricultural Service (FAS) homepage:  
<http://www.fas.usda.gov>.





## SECTION VI: APPENDIX

### 1. Definition of Seafood.

Seafood prominently includes fish and shellfish. Shellfish include various species of molluscs, crustaceans, and echinoderms.

- **Molluscs** are invertebrates with soft bodies that are not segmented like crustaceans, within this group of molluscas are the:
  - (a) bivalves (they are the clams, oysters, scallops, mussels and cockles)
  - (b) gastropods are protected by a calcareous shell which grows as the mollusc grows. Aquatic gastropods, also known as sea snails, are univalves which have a protective shell that is in a single piece. Common seafood groups are abalone, conch, limpets, whelks and periwinkles; and
  - (c) Cephalopods are not protected by a shell; such as octopus, squid and cuttlefish.
- **Crustaceans** are invertebrates with segmented bodies protected by hard crusts (shells). The shells do not grow, and are periodically shed or moulted. Most commercial crustaceans are decapods, i.e. they have ten legs, and have compound eyes set on stalks. Their shell turns pink or red when cooked. Lobsters, prawns or shrimps, crabs and krill are crustaceans.
- **Echinoderms** are headless invertebrates, found on the seafloor in oceans at all depths,



but not in fresh water. They are covered with a calcareous and spiky test or skin. The term echinoderm comes from the Greek ekinos meaning hedgehog, and dermatos meaning skin. Echinoderms used for seafood include sea cucumbers, sea urchins, and starfish.

Singapore Import Statistics Fish & Seafood Products							
Rank	Partner Country	2014		2015		2016	
		USD	Quantity (MT)	USD	Quantity (MT)	USD	Quantity (MT)
1	China	151,487,877	19,929	165,609,094	21,161	139,436,053	20,543
2	Malaysia	129,375,669	48,968	126,637,292	43,965	135,171,196	43,812
3	Indonesia	135,695,544	36,091	115,428,394	33,598	110,926,157	31,995
4	Vietnam	110,179,148	30,447	103,367,111	31,058	104,181,363	32,599
5	Norway	72,845,947	8,685	61,332,010	8,900	75,711,605	8,900
6	Japan	51,355,597	2,497	53,789,881	2,802	58,796,057	2,776
7	Thailand	63,210,546	20,002	54,442,788	18,178	54,586,606	17,517
8	Chile	28,722,723	3,988	31,339,174	4,576	38,120,442	5,056
9	India	37,097,714	5,248	35,699,532	5,353	37,268,004	5,556
10	Australia	40,149,365	1,227	43,034,456	1,950	35,668,283	1,370
11	France	16,930,227	672	15,953,919	660	35,663,457	1,278
12	United Kingdom	16,102,124	760	19,524,844	953	22,257,991	1,083
13	New Zealand	20,747,306	1,156	19,771,819	1,167	21,532,371	1,219
14	United States	18,974,892	1,282	20,919,801	1,318	19,881,757	1,394
15	Taiwan	14,903,069	2,925	19,505,041	2,683	18,612,042	2,624
16	Argentina	2,603,097	377	5,366,857	347	14,573,935	638
17	Korea South	10,121,360	1,292	11,174,248	1,317	14,281,109	1,508

18	Spain	8,722,317	890	12,314,617	1,357	14,053,797	1,118
19	Canada	10,787,037	892	12,535,264	928	13,880,139	1,081
20	Hong Kong	19,663,450	935	16,111,445	691	13,335,194	499
21	Philippines	15,171,499	1,479	14,129,951	1,399	10,912,408	1,090
22	South Africa	7,662,410	226	7,584,668	464	10,105,534	668
23	Namibia	5,729,517	749	6,304,172	655	8,580,299	713
24	Sri Lanka	6,588,010	633	7,140,412	743	6,500,957	456
25	Myanmar	7,520,427	2,226	5,868,114	2,139	5,765,709	2,247
	<b>Total:</b>	<b>1,049,132,259</b>	<b>198,641</b>	<b>1,037,663,927</b>	<b>197,584</b>	<b>1,072,726,864</b>	<b>193,710</b>

Sources: Global Trade Atlas (GTA)

**Singapore Import Statistics From United States  
Fish & Seafood Products**

Commodity	Description	2015		2016	
		USD	Quantity (MT)	USD	Quantity (MT)
030622	Lobsters, Live, Fresh, Ch, Dried, Salted Or In Brine	2,791,606	136	3,138,805	152
030389	Fish, Frozen, Nesoi	2,813,156	149	2,637,220	125
030363	Cod, Frozen	5,112,104	230	2,557,720	116
030711	Oysters, Live, Fresh Or Chilled	1,795,202	323	1,614,237	249
030383	Toothfish, Frozen	0	0	1,390,524	42
160552	Scallops, Prepared Or Preserved	616,598	25	1,094,703	47
030621	Rock Lobster, Other Sea Crawfish Lv/Ch/Drd/Salted	941,627	46	1,050,557	52
030771	Clams, Cockles And Ark Shells, Live, Fresh/Chilled	834,349	36	930,957	39
160420	Fish, Prepared Or Preserved, Nesoi	260,325	81	708,534	219
030624	Crabs, Raw (Live Etc), Cooked (Stm Etc) Not Frozen	635,735	27	673,311	31
030612	Lobsters, Including In Shell, Frozen	1,745,946	70	523,187	20
030819	Sea Cucumbers, Nesoi	0	0	402,161	6
030614	Crabs, Including In Shell, Frozen	194,607	8	391,914	15
160557	Abalone, Prepared Or Preserved	66,646	1	339,006	3
160530	Lobster, Prepared Or Preserved	701,427	32	292,959	19
030571	Shark Fins, Smoked, Dried, Salted Or In Brine	0	0	287,155	29
030485	Toothfish Fillets, Frozen	0	0	270,149	9
030319	Pacific Salmon, Nesoi, Excl Fillet, Liver,Roe, Frozen	16,394	1	154,296	39
030381	Dogfish And Other Sharks, Frozen	0	0	111,846	12
030311	Sockeye Salmon, Excl. Fillet, Livers & Roes, Frozen	104,167	4	109,603	5
160411	Salmon, Prepared Or Preserved, Whole Or Pieces	77,990	9	106,127	14
030499	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	554	0	103,563	50
030721	Scallops Incl. Queen Scallops, Live, Fresh, Chilled	73,592	2	92,722	2
030729	Scallops Incl. Queen, Frozen/Dried/Salted/In Brine	272,539	12	81,825	3
160556	Clams, Cockles & Arkshells, Prepared Or Preserved	144,557	5	81,075	15
160414	Tunas/Skipjack/Bonito Prep/Pres Not Minced	277,241	17	65,816	8
160431	Caviar	24,652	0	49,594	0
	<b>TOTAL:</b>	<b>20,919,801</b>	<b>1,318</b>	<b>19,881,757</b>	<b>1,394</b>

Sources: Global Trade Atlas (GTA)