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Report Highlights:

Singapore's food retail market has a positive outlook, supported by strong economic growth, high consumer purchasing power and low unemployment. It is highly competitive and concentrated, while demand is growing for premium, healthy, imported, and convenient foods, and online grocery. Singapore retailers, however, face high operating costs and exposure to price sensitivity, and global supply-chain and food-price risks. Overall, the strongest opportunities for U.S. companies are in premium, health and wellness, gourmet, and convenience food segments.

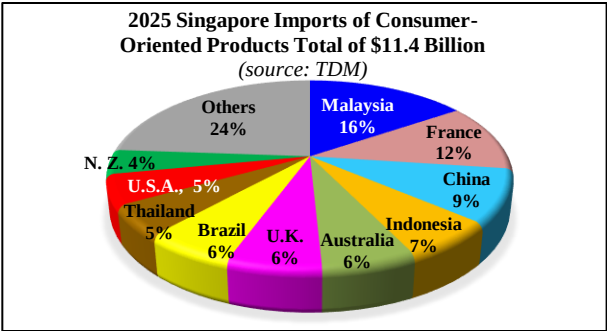
Market Fact Sheet: Singapore

Executive Summary

Singapore’s multi-billion-dollar food industry is highly import-dependent, driven by robust macro-fundamentals, elevated disposable incomes, and intensive urbanization. To mitigate its lack of domestic arable land, the city-state’s trade and regulatory frameworks are structurally optimized to secure a resilient pipeline of safe, high-quality agricultural products. Singapore’s total agricultural and related product import in 2025 reached \$19.3 billion USD, about 5 percent of which was sourced from United States.

Imports of U.S. Consumer-Oriented Products

In 2025, the United States was Singapore’s ninth largest supplier of consumer-oriented food and beverage (F&B) products, with total sales reaching \$580 million. Top U.S. products in the market include fresh fruits, food preparations, processed vegetables, poultry meat and products and chocolate & cocoa products.



Retail Food Industry

Singapore’s retail foods sector is highly developed and very competitive, with total sales of \$12 billion USD in 2025. Post pandemic, retail sales in Singapore have returned to normalcy and pre-pandemic levels. Three key players dominate the sector: NTUC Fair Price Cooperative, Dairy Farm International Holdings, and Sheng Siong Supermarket Chain.

Food Processing Industry

Although relatively small compared with neighboring countries, Singapore’s food manufacturing sector serves both domestic consumption and regional export markets. Nearly all food ingredients and raw materials are imported.

Quick Facts CY 2025

Imports of Consumer-Oriented Products – US\$11.4 billion

Top 10 Growth Products in Singapore

- (1) Dog & Cat Food
- (2) Fresh Fruits
- (3) Food Preparations
- (4) Processed Vegetables
- (5) Poultry Meat & Prods.
- (6) Chocolate & Cocoa Prods.
- (7) Distilled Spirits
- (8) Beef & Beef Prods.
- (9) Tree Nuts
- (10) Dairy Products

Food Industry by Channels (U.S. billion)

Food Retail Industry	\$12
Food Service-HRI	\$10
Food Processing (includes tobacco)	\$9
Food and Agriculture Exports	\$15

Top Singapore Retailers (by sales)

NTUC Cooperative
Cold Storage Retail Group (Macrovalue)
Sheng Siong Supermarket Chain

GDP/Population

Population (millions): 6.11 million
GDP (billions USD): 574.18
GDP per capita (USD): 94,481

Sources:

www.singstat.gov, Trade Data Monitor, World Bank, Euromonitor

Opportunities exist for U.S. suppliers of dairy ingredients, meat ingredients, dried fruits and nuts, specialty food ingredients, and functional and health-focused products.

Food Service Industry

Singapore has one of Asia’s most developed Hotel, Restaurant, and Institutional (HRI) sectors. In 2025, the country welcomed 17 million visitors and tourism receipts reached \$26 billion USD. HRI market drivers include major summits, conferences and exhibitions, luxury tourism, exclusive concerts, growth in premium dining, specialty food consumption, and cruise tourism.

Section 1. Market Summary

Singapore’s economy performed significantly better than initially expected in 2025, with a 5 percent¹ growth rate. The Ministry of Trade and Industry (MTI) upgraded its 2026 GDP growth forecast to 4.5 – 5.5 percent in August 2026. Despite the improved macroeconomic outlook, Singapore remains exposed to external risks because of its highly open, trade-dependent economy. Key risks include geopolitical tensions, energy-price volatility, global trade restrictions, supply-chain disruptions and high operating costs. These factors remain relevant to food retailers because Singapore imports most of its food and relies heavily on international logistics. Despite these challenges, the outlook for the sector is strong as the consumer market continues to be supported by high disposable incomes, strong currency, and low unemployment rates. The Singapore Government continues to provide economic stimulus measures and monetary aids to both businesses and individuals to mitigate economic hardship.

Singapore’s food retail market remains one of the most developed and competitive in Southeast Asia. Its position as a major regional port and logistics hub, combined with open trade policies and rigorous food-safety standards, supports a broad and reliable supply of imported and high-quality food products. The market has largely recovered from the pandemic and continues to evolve toward greater consolidation, omnichannel retailing, automation, AI-enabled operations, improved cold-chain logistics, sustainability, and ethical sourcing. Meanwhile, the competitive environment is becoming more concentrated. NTUC FairPrice and Sheng Siong remain the two dominant supermarket operators, while the former DFI Retail Group grocery businesses have undergone a major ownership transition. Euromonitor's latest 2026 assessment shows that FairPrice, Sheng Siong, and DFI collectively accounted for 88% of supermarket value sales in 2025, with shares of approximately 42%, 30%, and 16%, respectively.

Singapore’s food retail market remains strong and highly competitive in 2026. Mainstream supermarkets compete mainly on price, convenience and scale, while premium and specialty retailers are benefiting from rising demand for high-quality, healthy, imported, and gourmet foods. Convenience stores, traditional provision shops, and wet markets remain relevant, particularly for top-up and fresh-food purchases, although traditional formats face increasing pressure from supermarkets and online groceries platforms. Overall, the outlook is positive, supported by strong economic growth, high household purchasing power, and low unemployment. Key challenges remain; high rents, labor and logistics costs, intense price competition, and exposure to global food and energy prices. The strongest growth opportunities are in premium/specialty foods, health and wellness, imported products, convenience foods, and omnichannel/online grocery.

U.S. Exporter Opportunities and Challenges	
Opportunities	Challenges
- Singapore’s retail, food processing, and HRI sectors are highly dependent on a broad range of imported food products and ingredients. - High disposable incomes drive demand for premium products. - Singapore is a trendsetter and an ideal launch pad for food and beverage concepts.	-The Singapore market is highly competitive and can be very price sensitive for certain products. - Other regional suppliers including Malaysia, China, and Indonesia have gained significant market share.
Strengths	Weaknesses
-U.S. food and agricultural products are trusted and perceived to be of high quality. -Top U.S. brands are popular and in strong demand.	-Many U.S. exporters are unfamiliar with the market and are therefore sometimes unable to meet specific requirements and order sizes. -Time commitment for brand building can be significant.

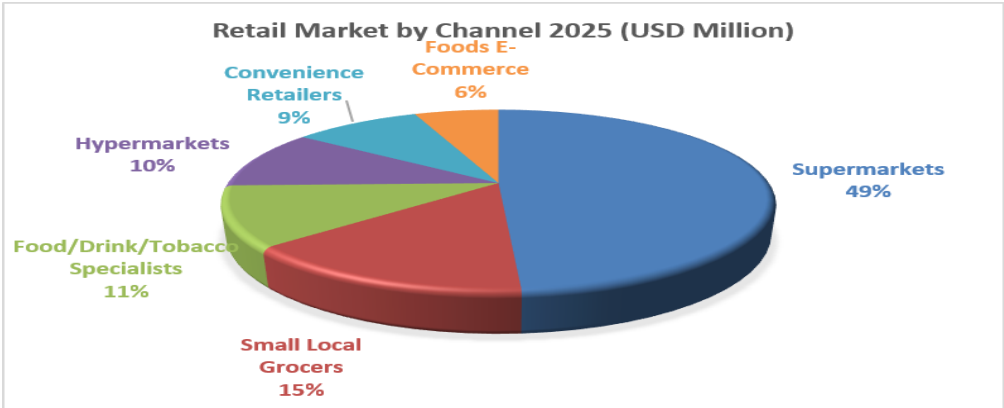
¹ Ministry of Trade and Industry (MTI)

Table 1: Advantages and Challenges in the Singapore Retail Foods Industry

Advantages
• Singapore is highly dependent on imports, which for 90 percent of its food requirements. • The city-state is a major port and logistics center which facilitates efficient importation of food products and is a free trade zone. • Affluent population with high disposable incomes and a well-traveled and educated population drives demand for premium products. • Preference for high-quality, wholesome, and natural products (although the market is niche). Younger generations with higher spending power often purchase imported meats, premium fruits, wines, spirits and beers, and pet food. • A large resident expatriate community of 1.1 million foreigners helps increase the influence of Western trends and eating habits and the proliferation of western-style restaurants and fast-food chains. • Multicultural population drives demand for international, halal, organic, and specialty foods. Consumers generally perceive “Made in USA” or “Imported from USA” and U.S. brands as signs of high-quality food and drink products.
Challenges
• High commercial rental and operating costs in Singapore are among the highest in Asia which make promotional marketing activities more challenging. • Competition in the Singaporean market is intense, with many countries investing significantly in promotion and market expansion. • Imported U.S. products can be more expensive than other regional suppliers. • End-users lack knowledge on use of U.S. products and their versatility. • U.S. exporters’ inability to service Singapore importers, retailers, and end users, i.e. meeting smaller packaging and reduced pricing that fits the market and providing marketing support.

Retail Sales by Channel

Chart 1: Retail Market by Channel



Source: Euromonitor

Section 2. Road Map for Market Entry

Entry Strategy

U.S. exporters should consider the following when planning to enter the Singapore market:

- **Regulatory Compliance:**
 - Analyze Singapore food laws, packaging and labeling requirements, and importer criteria for entry into the Singapore market.
 - Detailed information on Singapore regulations and requirements can be found by accessing the FAS/Singapore [*Food and Agricultural Import Regulations & Standards Country Report*](#). Maintain strong communication with local importers to ensure all certificates and import permits are valid and up to date.
- **Market Research:**
 - Review the types of U.S. products that can be readily targeted in the market.
 - Consider the price competitiveness of U.S. products in comparison with similar products available in Singapore.
 - Analyze product fit and market segmentation.
 - Develop pricing strategy
- **Exporter Assistance:**
 - USDA/FAS partners with [*State and Regional Trade Groups \(SRTGs\)*](#) and manages a toolkit of market development programs to help U.S. exporters develop and maintain markets. U.S. exporters are encouraged to participate in regional trade shows and trade missions by tapping into the resources offered by the SRTGs.
- **Due Diligence:**
 - Select partners/importers carefully and conduct due diligence and background checks to avoid trade conflicts and financial disputes.
- **Develop Links:**
 - Develop links with local importers that target major retailers. U.S. exporters are advised to appoint local distributors or at least a local representative to help guide them through the requirements of Singapore food regulations and local trading practices.
 - Singaporeans are long-term planners; therefore, building relationships through meetings and visits when possible is key.
- **Market Promotion:**
 - Participate in regional trade shows and trade missions by tapping into the resources offered by SRTGs or Cooperators supported by USDA's funding allocations.
 - Conduct product promotions and/or demonstrations through retail instore promotions, online platforms via social media, web-based advertising, etc. to engage with end-users. This type of marketing is particularly effective during festive and peak seasons (for example, "Great Singapore Sale", Chinese Lunar New Year, Christmas, etc.).

Import Procedures

The agencies involved in customs clearance include the [*Accounting and Corporate Regulatory Authority \(ACRA\)*](#), [*Singapore Food Agency \(SFA\)*](#), and [*Singapore Customs*](#). Only SFA-registered importers are

allowed to apply for food import permits, and registration numbers can be obtained from SFA’s Quarantine and Inspection Department.

There are several prerequisites to the application: the importer must first be a company/business that is registered with ACRA; obtain a Unique Entity Number (UEN); register and activate their UEN with Singapore Customs; and open and maintain a GIRO account for the payment of fees and permits. After complying with the prerequisites, the importer can then apply for an import permit through the Networked Trade Platform (NTP). For the details, please refer to Section IX: Import Procedures in aforementioned [FAIRS Country Report 2025](#).

For Geographical Indicators, Trademark, Brand Names, and Intellectual Property Rights, please refer to Section VIII, [FAIRS Country Report 2025](#) for detailed information.

Market Structure:

Singapore's Grocery Landscape: A highly competitive, four-tiered ecosystem driven by dominant mass-market chains, heartland value stores, country-specific specialty shops, and rapid digital delivery platforms.

Table 3: Singapore's "Big Three" grocery retailers:

Feature	NTUC FairPrice	Cold Storage (DFI / Macrovalue)	Sheng Siong
Market Position	Market Leader (approx. 42% market share)	Premium & Gourmet Niche	Heartland Champion (Third-largest chain, fast capturing market share)
Network Size	370+ total outlets (~230 core grocery stores)	47 to 50 stores islandwide	90 stores across Singapore (with plans to expand to over 120)
Target Audience	Mass market; targets all income groups	Mid-to-high income; expatriates & gourmet shoppers	Budget-conscious; suburban heartland households
Key Retail Formats	FairPrice, Finest, Xtra (Hypermarket), Xpress, Cheers, Unity Pharmacy	Cold Storage, CS Fresh (Flagship), Market Place, Jasons Deli	Sheng Siong Supermarket (primarily large standalone formats and HDB heartland stores), Sheng Siong Online
Brand Strategy	House brands (<i>Pasar, Gold</i>) & major exclusives (<i>Kirkland Signature, Tesco</i>)	Heavy focus on premium international imports and artisanal fresh food	Strong focus on value pricing, live/fresh seafood, and extensive budget house brands (<i>Happy Family, Heritage</i>)
Core Strengths	Omnichannel dominance, diverse formats, and extensive global concept partnerships	Experiential shopping, gourmet counters, and upscale niche branding	Highly efficient supply chain, wet-and-dry market concepts under one roof, and high-margin fresh produce focus

- *Online & Quick-Commerce:* Digital grocery delivery spans broad e-commerce ecosystems (RedMart by Lazada, Shopee), localized instant-fulfillment apps (PandaMart, Grab Food), and premium organic boutique storefronts (Little Farms, Sasha's Fine Foods).
- *Value-Focused Suburban Chains:* Heartland areas are served by price-competitive local supermarkets targeting budget-conscious shoppers, led by Prime Supermarket (26 stores), Hao Mart (6 stores), and Tian Ma Group (19 stores) which includes an island-wide online delivery store.
- *East Asian Specialty Chains:* Distinct regional preferences are captured by Scarlett Supermarket (40 outlets) in major shopping districts specializing entirely in China-imported items, and Don Don Donki (16 outlets) in shopping malls specializing in Japanese groceries and ready-to-eat meals.
- *Country-Specific Gourmet Stores:* Premium international niches include traditional Japanese department stores (Meidi-Ya, Isetan Supermarket), South Korean snack and grocery mainstays (Shine Korea, Koryo Mart), and premium French wine and epicurean retailers (SO France).
- *Mass-Volume Global Import:* The iconic Mustafa Supermarket in Little India serves as a high-volume hub importing globally (including the U.S.), drawing massive numbers of tourists and migrant workers.
- Traditional "wet and dry" markets and "mom and pop" grocery stores, located in suburban neighborhood areas targeting on the non-tech savvy consumers.

Distribution Channels

Singapore's grocery retail sector uses a mix of distribution channels to reach consumers efficiently across all areas. Large retailers also procure directly for cost efficiencies and most have their own warehousing facilities to store and to repackage goods. Distribution to wet markets, hawkers, and small neighborhood stores is usually managed by intermediary wholesalers; however, market penetration of U.S. products in these alternative channels is limited. Singapore's distribution channels for consumer-ready foods are dominated by supermarkets, hypermarkets, and the two leading convenience store chains, [7-Eleven](#) and [Cheers](#), which are also owned and operated by the two leading supermarket operators, [NTUC FairPrice Cooperative](#) and Cold Storage Supermarkets (formerly Dairy Farm Group, recently acquired by Macrovalue). Following is a breakdown of the key channels:

1. *Physical Stores:*
 - a. Supermarkets and Hypermarkets: NTUC FairPrice, Giant, Sheng Siong and Cold Storage.
 - b. Convenience Stores: 7-Eleven, Cheers, FairPrice Xpress.
 - c. Specialty Stores: Don Don Donki, Little Farms, Meidi-Ya, Mustafa Center.
2. *Online Platforms:*
 - a. Retailer-Owned Sites: FairPrice Online, Sheng Siong Online, Giant Online, Cold Storage Online.
 - b. Marketplaces: RedMart (via Lazada), PandaMart (via FoodPanda), and Grab Food Groceries
 - c. Specialty E- Grocers: Sasha's Fine Foods, The Fishwives, Ryan's Grocery, Little Farms, etc.
3. *Direct-to-Consumer Delivery:*
 - a. Same-day or Scheduled Delivery: Offered by most major grocers and platforms
 - b. Subscription Services: Meal kits and curated bundles
 - c. Cold Chain Logistics: Ensures freshness of perishables like seafood and dairy operated by seafood retailers and foodservice suppliers selling directly to consumers.
4. *Distribution Centers & Warehousing:*

- a. Centralized Hubs: Sheng Siong's automated warehouse, NTUC FairPrice's logistics network.
 - b. Third-Party Logistics: Used by smaller retailers and specialty grocers.
- 5. *Wet Markets*: Traditional Channels: Still popular for fresh produce, meats and local specialties because of the personal touch and freshness.
- 6. *In-Store Pickup & Click and Collect*:
 - a. Hybrid Models: Online orders, pick-up in-store or at designated lockers. Large retailers FairPrice, Giant and Cold storage offer this service.

Sector Trends

E-Commerce, Q-Commerce, and Social Selling

- *Omnichannel & Ultra-Fast Logistics*: E-commerce has transitioned from a pandemic necessity into a core structural market pillar. Major players like Lazada-RedMart maintain high engagement through gamified promotional campaigns, bundle discounts, and country-specific promotions. To capture instant demand, delivery ecosystems have evolved toward quick commerce (Q-Commerce), highlighted by the launch of RedMart Now providing 30-minute essential deliveries alongside staples like PandaMart (FoodPanda) and Grab Food Groceries.
- *The Rise of Social Commerce*: Livestream shopping has achieved massive commercial prominence. Retailers and brands are heavily leveraging live selling overlays on TikTok Shop, Shopee Live, Lazada Live, and Facebook Live to turn real-time digital engagement directly into grocery and consumer product purchases.

Cost-of-Living Realities vs. Premium Demands

- *Bifurcated Consumer Behavior*: Spending patterns have divided. While a steady affluent baseline drives consistent demand for premium, ethical, and organic items through boutique delivery and artisanal grocers, broader macroeconomic cost pressures have triggered widespread brand disloyalty and brand switching.
- *House brand Dominance*: To capture value-driven shoppers, major chains have aggressively scaled their private labels. Market leader FairPrice Group extended major price-freeze programs on hundreds of daily essentials, positioning house brands as high-margin, defensive shields against inflation.

Health, Sustainability, and Food Security

- *Wellness & Ingredient Transparency*: Healthy eating and environmental impact remain top-of-mind. Consumers actively seek out organic, preservative-free options with reduced sugar, salt, and fat.
- *Singapore's "30 by 30" to "30 to 35" Plan Integration*: Strategic focus remains locked on Singapore's government-mandated, now to "30 by 35" plan (producing 30% of nutritional needs locally by 2035). FairPrice and Sheng Siong lead the market in highlighting local produce and sustainable agri-tech partnerships in their primary marketing.

Frictionless Retail Tech & Unmanned Stores

- *Autonomous Checkout Maturation*: Automation has advanced rapidly due to rising wage pressures and labor constraints. 7-Eleven Singapore launched prominent, fully unmanned autonomous stores utilizing friction-free AI vision checkout technology.
- *Pragmatic Automation Deployment*: While full-scale, public unmanned stores face high operational overheads, the sector has adapted by deploying tech in targeted, controlled settings like university campuses and corporate hubs. In mass markets, the strategy has shifted toward hybrid automation—

such as FairPrice Group’s island-wide rollout of its Google Cloud AI-powered *"Store of Tomorrow"* program, which integrates smart shopping carts and real-time Vision AI inventory tracking into traditional brick-and-mortar runs.

Heartland Brick-and-Mortar Consolidation

- *The Struggle of Traditional Formats:* Small-scale independent grocers and traditional neighborhood "mom and pop" provision shops face severe pressure. Struggling to compete with the automated supply chains, comprehensive loyalty ecosystems, and digital reach of scale operators, these grassroots retailers are experiencing persistent declines in physical foot traffic and retail volume.

Section 3. Competition

Graphic 1: Top Ten Supplying Countries to Singapore and their Market Share



Table 4: Competition in the Major Consumer-Oriented Product Categories

Product Category (2025)	Major Supply Sources (2025)	Foreign Supplier Situation	Local Supplier Situation
Beef and Beef Products Net Imports: \$395 million	1. Brazil: 35% 2. Australia: 27% 3. United States: 13% 4. Japan: 7% 5. New Zealand: 6%	Australia & New Zealand are traditional suppliers. Brazil competes in the frozen beef segment.	Singapore does not produce beef.
Pork and Pork Products Net Imports: \$509 million	1. Brazil: 44% 2. Australia: 19% 3. China: 9% 4. Spain: 7% 5. Germany: 5% 6. Netherlands: 4%	Brazil dominates the frozen segment, while Australian pork dominates the fresh/chilled market.	Live pigs from East Malaysia are imported and slaughtered. Most of the locally slaughtered meat is sold at wet/traditional markets

	7. United States: 2%	U.S. processed pork is growing in popularity.	and supermarkets.
Poultry Meat and Products Net Imports: \$551 million	1. Brazil: 52% 2. Thailand: 28% 3. China: 7% 4. Malaysia: 5% 5. United States: 4%	Brazilian poultry is currently price competitive in the Singaporean market.	Malaysian live chickens are imported and processed in-country.
Seafood Products Net Imports: \$1.2 billion	1. Malaysia: 15% 2. China: 14% 3. Vietnam: 12% 4. Indonesia: 10% 5. Japan: 8% 14. United States: 1%	ASEAN countries and China dominate. Fresh/chilled prawns, live crabs, frozen cuttlefish, and squid are key products.	90% of seafood is imported. The remainder is supplied by sea-based Singaporean aquaculture operations.
Fresh Fruit Net Imports: \$631 million	1. China: 19% 2. Malaysia: 13% 3. Australia: 12% 4. United States: 8% 5. South Africa: 8%	Top U.S. fresh fruits in the Singapore market include grapes, oranges, strawberries, and apples.	Singapore produces very little fresh fruit.
Processed Fruit Net Imports: \$151 million	1. China: 23% 2. Malaysia: 12% 3. Indonesia: 11% 4. Thailand: 8% 5. United States: 7%	U.S. processed fruits are very popular; some are repacked and sold under local brands.	Singapore is not a significant producer of processed fruit.
Tree Nuts Net Imports: \$186 million	1. Malaysia: 25% 2. Indonesia: 19% 3. United States: 17% 4. Vietnam: 8% 5. China: 8%	Along with cashews from neighboring countries, U.S. nuts are very popular. Some U.S. nuts are repacked and sold under local brands.	Singapore is not a major producer of edible nuts.
Wine and Beer Net Imports: \$848 million	1. France: 65% 2. Australia: 8% 3. Italy: 4% 4. United States: 3% 5. Vietnam: 3%	France dominates the premium wine market. U.S. wines are growing in popularity.	Singapore does not produce wine. Asia Pacific Breweries (APB) dominates the beer market.

Source: Trade Data Monitor

Section 4. Best Product Prospect Categories

Table 5: Top Consumer-Oriented Products Imported from the United States

U.S. Products	2025 Singapore Total Value (million USD)	2025 Total Import Value from the United States (million USD)
Food Preparations & Ingredients: Soups and broths, condiments and sauces; including ready-to-eat frozen meals.	\$1,175	\$127
Dairy Products: ice cream, food preps for infants, cheeses, dairy spreads, butter, buttermilk, yogurt, milk, and cream	\$1,175	\$87
Fresh Fruit: Pomegranates, all berries, stone fruits, apricots, pears, apples, grapes, grapefruits and citrus, and avocados	\$631	\$52
Beef & Beef Products: Fresh, chilled and frozen bovine animals (different parts), boneless and bone-in.	\$395	\$50
Processed Vegetables: canned, frozen, prepared/ready-to-eat vegetable products; sweet corn, olives, beans, peas, potatoes, vegetables for infants, potatoes including frozen French fries, flakes and granules, tomatoes, cucumbers including gherkins	\$317	\$38
Tree Nuts: Macadamia, pistachios, walnuts, almonds, cashew nuts, and brazil nuts	\$186	\$31
Chocolate & Cocoa Products	\$664	\$28
Bakery Goods, Cereals & Pasta: Toasted bread & similar toasted products, waffles & wafers, cookies, crispbread, baked goods containing roasted cereals, mixes and doughs for preparation of bread, pastry, cakes, and biscuits including plant-based items.	\$626	\$22
Poultry Meat & Products: Poultry meat, turkey meat whole and cuts, ducks, whole and cuts.	\$551	\$20

Source: Trade Data Monitor

Table 6: Best Product Prospects Category for the Retail Foods Sector

Bakery Goods, Cereals & Pasta: Toasted bread & similar toasted products, waffles & wafers, cookies, crispbread, baked goods	Non-alcoholic Beverages: Beer without alcohol, coffee and tea, waters including mineral waters, aerated, sweetened or
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containing roasted cereals, mixes and doughs for preparation of bread, pastry, cakes, and biscuits. • Beef and Beef Products: Fresh, chilled and frozen bovine animals (different parts), boneless and bone-in. • Chocolate and Cocoa Products • Cooking Oils • Dairy Products: ice cream, food preps for infants, cheeses, dairy spreads, butter, buttermilk, yogurt, milk and cream • Distilled Spirits: liqueurs and cordials, vodka, gin, rum, whiskies and other spirits. • Food Preparations: Soups and broths, condiments and sauces; including ready to eat frozen meals. • Fresh Fruit: Pomegranates, Persimmons, kiwifruit, all berries, stone fruits, apricots, pears, apples, grapes, grapefruits and citrus, and avocados. • Fresh Vegetables: Brussel sprouts, pumpkins, squash and gourds, spinach, capsicum, mushrooms, celery, asparagus, peas, salad beets, carrots and turnips, lettuce, kale and cabbage, cauliflowers and broccoli, onions and shallots, and potatoes. • Fruit & Vegetable Juices: Apple, cranberry, grape, tomato juice, pineapple, grapefruit, orange, and other citrus juices.	flavored • Pork and Pork Products: All meat cuts, meats brined or smoked frozen. • Poultry and Poultry Products: Poultry meat, turkey meat whole and cuts, ducks, whole and cuts • Processed Fruits: Cranberries, strawberries, peaches, cherries, apricots, pears, peanut butter, jams, fruit jellies, marmalades, purees or pastes, dried apples, prunes, apricots, raisins, figs and dates. • Processed Vegetables: sweet corn, olives, beans, peas, potatoes, vegetables for infants, potatoes including frozen French fries, flakes and granules, tomatoes, cucumbers including gherkins • Tree Nuts: Macadamia, pistachios, walnuts, almonds, cashew nuts, and brazil nuts • Dog and Cat food • Seafood: Abalone, octopus, mussels, scallops, oysters, fresh, prepared or preserved, crustaceans, lobsters, shrimps and prawns, fish, tunas, salmon, sea cucumbers, clams, cockles and ark shells. • Spices: Ginseng roots, cinnamon, cloves, black and white pepper, vanilla crushed or ground. • Wine and Beer: Still and sparkling wines including craft beers.
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Table 7: Singapore's Top Ten Consumer-Oriented Agricultural Products Imports (million USD)

Product Category (2025)	Major Supply Sources/Competing Country (2025)
1. Dairy Products Net Imports: \$1.2 billion	New Zealand – 29%, Australia – 12%, Thailand – 8% and U.S.A. – 7%
2. Food Preparations & Ingredients Net Imports: \$1.2 billion	Indonesia – 20%, Malaysia – 14%, China – 11% and U.S.A. – 11%
3. Bakery Goods, Cereals, & Pasta Net Imports: \$626 million	Malaysia – 40%, China – 9%, Japan – 6%, Thailand – 5%, Italy – 5%, Indonesia – 4%, South Korea – 4% and U.S.A. – 3%

4. Fresh Fruit Net Imports: \$631 million	China – 19%, Malaysia – 13%, Australia – 12%, U.S.A. – 8% and South Africa – 8%
5. Poultry Meat & Products (ex. Eggs) Net Imports: \$551 million	Brazil – 52%, Thailand – 28%, China – 7% Malaysia – 5%, and U.S.A. – 4%
6. Chocolate & Cocoa Products Net Imports: \$664 million	Malaysia – 33%, Netherlands – 12%, Indonesia – 8%, Ghana – 6%, Switzerland – 5%, France – 4%, U.S.A. – 4% and U. K – 4%
7. Non-Alcoholic Beverages Net Imports: \$404 million	Malaysia – 61%, Thailand – 8%, China – 5%, Australia – 4%, Vietnam – 4%, Indonesia – 3% and U.S.A. – 2%
8. Beef & Beef Products Net Imports: \$395 million	Brazil -35%, Australia – 27%, U.S.A. – 13% Japan – 7% and New Zealand – 7%
9. Processed Vegetables Net Imports: \$317 million	China – 34%, Thailand – 17%, U.S.A. – 12% and Malaysia – 8%
10. Tree Nuts Net Imports: \$186 million	Malaysia – 25%, Indonesia – 19%, U.S.A. – 17% , Vietnam – 8% and China – 8%

Source: Trade Data Monitor

Table 8: Best Prospective U.S. Products for the Singaporean Market (million USD)

U.S. Product (see Table 4 for specific products)	2025 Singapore Total Import Value	2025 Total Import Value from the United States	2025 U.S. Market Share
Seafood (i.e. frozen fish and scallops) Live crustaceans are preferred for the Chinese restaurants and seafood restaurants.	\$1,245	\$16	1%
Bakery Goods, Cereals & Pasta: Toasted bread & similar toasted products, waffles & wafers, cookies, crispbread, baked goods containing roasted cereals, mixes and doughs for preparation of bread, pastry, cakes, and biscuits including plant-based items.	\$626	\$22	4%
Fresh Fruit (i.e. citrus, stone fruit, etc.): Pomegranates, Persimmons, kiwifruit, all berries, stone fruits, apricots, pears, apples, grapes, grapefruits and citrus, and avocados	\$631	\$52	8%

Pork & Pork Products: All meat cuts, meats brined or smoked frozen.	\$509	\$11	2%
Beef & Beef Products: Fresh, chilled and frozen bovine animals (different parts), boneless and bone-in.	\$395	\$50	13%
Tree Nuts: Macadamia, pistachios, walnuts, almonds, cashew nuts, and brazil nuts	\$186	\$31	17%
Processed Fruit (i.e. dried fruits): Cranberries, strawberries, peaches, cherries, apricots, pears, peanut butter, jams, fruit jellies, marmalades, purees or pastes, dried apples, prunes, apricots, raisins, figs, and dates.	\$151	\$11	7%
Dog & Cat Food: processed vegetables such as diced or pureed carrots, peas, corn, and vegetable blends. Freeze-dried meals including treats.	\$68	\$12	18%

Source: Trade Data Monitor

Products Not Present in Market with Good Sales Potential: The Singapore Food Agency, the lead agency for food-related matters including ensuring and securing a supply of safe food for Singapore, works with industry to diversity import sources. The industry is well informed and traveled (i.e. foreign buyer/trade missions) for food supplies, and thus the shelves are well stocked.

Products Not Present, or with minimal presence, in Market due to Significant Barriers:

1. Chilled Pork

Section 5. Key Contacts and Further Information

Organization	Address	Contact
USDA Agricultural Affairs Office American Embassy Singapore www.fas.usda.gov	27 Napier Road Singapore 258508 Tel: (65) 6476-9120	Email: AgSingapore@usda.gov
U.S. Dairy Export Council USA Rice Federation	20 Martin Road Seng Kee Building, 08-01 Singapore 239070 Tel: (65) 6230 8550	Dalilah Ghazalay USDEC Regional Director, SEA Marketing & Operations USARF Country Director Email: Dali@agribusinessconnect.asia

U.S. Grains & BioProducts Council	14-1 Wisma UOA Damansara II No. 6, Changkat Semantan, Damansara Heights 50490 Kuala Lumpur, Malaysia Tel: (60) 3 2093 6826	Caleb Wurth Regional Director, SE Asia & Oceania Email: sea@grains.org
U.S. Meat Export Federation	627 A Aljunied Road #04-04 Biztech Centre Singapore 389842 Tel: (65) 6733 4255	Sabrina Yin, Regional Director Email: singapore@usmef.com.sg
California Wine Institute Food Export-Midwest Food Export-Northeast Western U.S. Agricultural Trade Association	48 Toh Guan Road East #02-129 Enterprise Hub Singapore Tel: (65) 6515 6113	Richard Lieu Chuah Siew Keat Emails: richardlieu@lieumktg.com.sg ; siewkeat@lieumktg.com.sg
U.S. Soybean Export Council	541 Orchard Road #11-03 Liat Towers Singapore Tel: (65) 6737 6233	Timothy Loh, Director Email: TLoh@ct.ussec.org
U.S. Wheat Associates	#15-02 Liat Towers Singapore Tel: (65) 6737 4311	Joe Sowers, Regional Vice President for South Asia Email: InfoSingapore@uswheat.org

Singapore Government Websites:

Singapore Food Agency

Food Standards and Regulations

The Singapore Food Agency (SFA) is the national authority responsible for food security and safety matters in the country. Several types of food products entering Singapore must originate from establishments approved by SFA. For more details on export requirements to the Singapore market, please refer to the latest FAS Singapore [FAIRS Country Report 2025](#).

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

Department of Statistics

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

Singapore Government

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

U.S. Websites:

USDA FAS

<https://www.fas.usda.gov/>

USDA FAS GAIN Reports

<https://fas.usda.gov/data/search>

USDA FSIS

www.fsis.usda.gov/inspection/import-export/import-export-library

Regional Associations & Trade Groups

www.nasda.org/about/regional-associations-trade-groups

Food Export Midwest

<https://www.foodexport.org/>

Food Export Northeast

Southern U.S. Trade Association	https://www.susta.org/
Western U.S. Agricultural Trade Association	https://www.wusata.org/

End of report

Attachments:

No Attachments