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**Market Profile  
for the  
Hotel, Restaurant and Institutions Sector  
Food & Beverage  
in Southeast Asia**

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## 1.0 MARKET OVERVIEW

### 1.1 Market size and structure

The five countries covered in this report – Indonesia, Malaysia, Singapore, Thailand and Vietnam – have a combined total population of more than 423 million (Indonesia 237.5 million)<sup>1</sup> and all five are growing strongly. There are a number of common demographic changes in the region – rising incomes, exposure to Western brand marketing, increasing health consciousness, a growing youth market with money to spend, busier lifestyles, more women in the workforce and rising standards of living. These are leading to a number of consumer trends in the food retail and food service industries:

- convenient, processed and pre-packaged foods
- eating out
- healthy alternatives
- foreign (Western) food products and brands.

Expenditure on food and beverages (F&B) is growing in all five countries, but as the table below shows, the total market size and expenditure per capita varies considerably from country to country.

**Table 1** Food and beverage market value and expenditure per capita, 2004-2008

	F&B expenditure	2004	2005	2006	2007	2008
<b>Indonesia</b> (population 237.5m)	Market value (\$US in billions)	20.76	22.05	23.39	24.81	26.32
	Per capita (\$US)	91.89	96.34	100.94	105.75	110.85
<b>Malaysia</b> (population 27.7m)	Market value (\$US in billions)	8.29	8.64	8.94	9.37	9.81
	Per capita (\$US)	352.68	360.85	366.86	377.58	388.45
<b>Singapore</b> (population 4.8m)	Market value (\$US in billions)	6.16	6.41	6.71	6.98	7.27
	Per capita (\$US)	1,392.54	1,427.02	1,470.71	1,510.3	1,556.09
<b>Thailand</b> (population 67m)	Market value (\$US billions)	18.78	19.37	20.58	21.64	22.75
	Per capita (\$US)	294.15	301.21	317.75	331.86	346.6
<b>Vietnam</b> (population 86m)	Market value (\$US billions)	6.19	6.62	7.09	7.62	8.16
	Per capita (\$US)	79.29	83.9	88.76	94.03	99.31

Source: Datamonitor. Consumer Products Database

### 1.1.1 Indonesia

Indonesia is the largest archipelago in the world with over 17,508 islands, which presents considerable distribution challenges. With 60% living in the island of Java however, most products, particularly imported ones are sold in the major cities of Indonesia such as Jakarta, Bali, Surabaya and Bandung. Indonesia has over 3000 hotels, restaurant and cafés. It is estimated that 12% of the population are families with high incomes, 40% are middle income families and 48% are on lower incomes. Imported goods generally target families with higher incomes which accounts for around 30 million locals and to tourists. The government's target expectation is for eight million tourist visitors for 2009, of which most will visit Bali or Jakarta.

According to Indonesia's Food & Beverage Association, imported food and beverage products account for less than 5% of food and beverage consumption. In 2008 total food and beverage consumption is estimated at over Rp 241 trillion (US\$ 26.3 billion).<sup>2</sup> New Zealand's largest exports to Indonesia are dairy and meat products and account for more than half a billion New Zealand dollars and more than 50% of exports to Indonesia.

The majority of Indonesians are Muslim, so products produced according to halal requirements sell best. The demand for healthier foods – especially those fortified with vitamins and minerals is a rapidly growing trend.

Due to the large number of tourists there has been a dramatic growth in the number of international hotels, restaurants and international food chains in the major urban areas. Indonesians have also become more interested in Western products over the past decade as more of the population travel, study and do business abroad.

The Indonesian hotel, restaurant and institutional (HRI) sector is extremely diverse, consisting of hotels and restaurants that serve local and international cuisine, fast food outlets, cafés and bars, small restaurants, street-side open air restaurants and street vendors. The four and five-star hotels cater to the tourist industry and up-scale restaurants including cafés and bars specialise in Western and other non-Indonesian foods.<sup>3</sup>

Although roadside stalls and kiosks continue to dominate the food service industry, there has been rapid growth in both the demand and supply of Western-style fast-food outlets.<sup>4</sup>

### 1.1.2 Malaysia

Malaysia is considered one of the more developed of the developing countries in this region, with a rising economy and increasing household incomes. Processed food consumption is growing, with two thirds of all food imports into Malaysia falling into the processed food category. There is strong consumer demand for imported beef and mutton, an increased variety of fruit and vegetables, seafood, soft drinks (particularly bottled water and juices) and halal products as 60 percent of the population is Muslim. Consumption of seafood in Malaysia is also high and is expected to continue over the next three to four years.<sup>5</sup> Restaurants sell considerable amounts of seafood and supermarkets are also expanding their seafood sales.

Dining out is becoming more popular in Malaysia as rising incomes and busier lifestyles change consumer behaviour. There were approximately 71,000 hotel, restaurant and institutional outlets operating in Malaysia in 2006<sup>6</sup>. The sector is expected to register strong growth, particularly within tertiary education institutions, restaurants, fast-food outlets, cafes and convenience stores. The government is set to be a strong influence on the fast-food industry as controls are tightened in an attempt to curb the high obesity levels throughout the country. Accordingly, health awareness is becoming more important.

### 1.1.3 Singapore

Singapore is a highly developed country with increasingly sophisticated and demanding consumers. Relatively high incomes have led to decreasing price sensitivity, although price is still an important element to consumers. Singapore is reliant on imports as there is very little domestic food production however the market is saturated and over the next few years any increase in food imports is likely to come from niche markets such as organic and functional foods. In addition, Singapore is also an important re-export destination with US\$162 million worth of goods being re-exported, equating just over 50 percent of the total imports in 2008.

There is consumer demand particularly for wine (with dominant French imports being challenged by Australia, New Zealand and the Americas), beer, seafood, meat and organic products. A growing brand-conscious youth market has led to strong demand for foreign brands, particularly coffee.<sup>7</sup>

The HRI sector is mature in Singapore as the city state is the tourism and transportation hub of Southeast Asia. There were 14,000 outlets operating in 2006, made up of street stalls, small family-run restaurants and large chains.<sup>6</sup> The restaurant sector dominates, followed by hotels-with-restaurants and fast-food chains. Full service restaurants account for 43 percent of the US\$3.7 billion spent annually by consumers on food consumption away from home<sup>8</sup>.

There is a growing demand for inexpensive fast-food outlets due to increasingly busy lifestyles. As the average household size has shrunk and more women have chosen to pursue careers, the average number of meals eaten outside the home has steadily increased. Other trends include healthy alternatives and new foods and cuisines. **Error!**

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### 1.1.4 Thailand

There is a growing interest in healthy foods and convenience foods, leading to an increase in demand for healthier snack foods, processed and packaged foods as well as a growing interest in Western brands. There is product growth in the areas of dairy, coffee, green tea, soybeans, bottled water, juice, energy drinks and beer, despite the government's attempts to curb the consumption of alcohol.

A trend towards reduced time for food preparation at home is likely to contribute to the growth in demand for processed foods, cooked food from street stalls and local low-priced

eateries. Street stalls are still popular amongst consumers and are currently estimated to account for three-quarters of sales in the sector<sup>9</sup>.

The HRI food service sector totals approximately 150,000 outlets, including 100,000 restaurants and 5,000 hotels and resorts. The hotels, restaurants, resorts and institutional contracts rely heavily on imported food which accounts for approximately 30 to 50 percent of their total food requirements. Expenditure on food in this sector is estimated to be US\$2.7billion in 2007.<sup>10</sup>

Independently owned restaurants are being replaced by chains of restaurants and sidewalk restaurants are slowly disappearing and new ones are opening up in food centres and food courts. Western-style food outlets, fast-food operations and coffee shops are also expanding.<sup>10</sup>

### 1.1.5 Vietnam

Vietnam's HRI sector is less-developed than other countries in the region, but is growing. Vietnam has recently joined the World Trade Organisation (as of January 2007) and this is leading to a number of significant changes for the industry. Gradual removal of export subsidies, import tariffs for agricultural products and the elimination of import quotas will most likely lead to increased competition, a wider range of products and lower consumer prices.

As with other parts of the region, busier lifestyles and rising incomes are leading to a growing demand for convenience foods. Demand is high for dairy products, alcoholic drinks, juices, energy drinks, coffee, fresh fruit, canned fruit and vegetables, confectionary, snacks, canned meat and chilled and frozen meat. While price is still the most important factor in purchasing, quality is becoming more important to a more discerning consumer market.<sup>11</sup>

The Vietnamese HRI sector is still in its infancy compared with other parts of Southeast Asia, but is growing strongly in urban areas. Increasing tourism and business travellers and rising income levels are contributing to sectors growth. Vietnam had 169,000 outlets in 2006<sup>6</sup>, many of which were hawkers and street stalls. The fast-food industry is growing quickly although currently there are only three major foreign chains operating in Vietnam, Jollibee (Philippines), Yum Brands (USA) which operates KFC and Pizza Hutt and Lotteria (South Korea). Along with Western-style fast-food restaurants, demand for cafeteria style bakeries and coffee shops is also growing.<sup>11</sup>

Vietnam is a new destination for tourists, business and foreign investments and there are many new hotels and resorts planned to meet the increasing demand for quality accommodation. This will also increase demand for high quality imported food and beverages.<sup>12</sup>

## 1.2 Known factors influencing growth rates

### 1.2.1 Indonesia

Hotel chefs have noticed a trend towards healthy products but not as far as having to provide organic food. As most hotels are halal hotels, halal food and beverage provides a significant advantage. The pricing of products, consistency of supply, quality of product, preference due to chef tastes and promotion are all key factors influencing choices made by chefs at hotels, restaurants and cafés. As tourism grows, the need for more high quality products is expected to rise. Some companies provide incentives for chefs and offer trips to New Zealand if targets are reached.

Recent regulation changes and raids on hotels for illegal products and the global economic crisis in general have recently negatively impacted on growth. This has resulted in a number of shortages of high quality imported products at hotels. The need for cost cutting has meant chefs have had to source local substitutes (generally inferior in quality).<sup>13</sup>

### 1.2.2 Malaysia

The main challenges faced by New Zealand products are:

- lack of availability.
- inconsistent supply.
- low visibility in the market.
- not competitive in pricing (in comparison to Australia).
- knowledge on New Zealand products is generally low.
- lack of dedicated distributors who are committed to push the relevant New Zealand products. New Zealand products in most cases account for only a small portfolio in the entire product list.

Opportunities for New Zealand products in the food service sectors are live seafood and shellfish as well as cheese. Although the food trend is leading toward organic and healthy food, the preference of organic produce in the food service sector is still very low and insignificant. Halal is an important criteria for food and beverage companies targeting the Malaysia market. Although it is not a mandatory requirement, it is preferred by all food service and retail outlets unless the property is declared non-halal.

The impact of the economy slowdown is so far very minimal to the food service sector although the hotel occupancy rate has reduced. Anecdotal evidence suggests that diners are moving from fine dining restaurants to the middle range restaurants though service operators are cautious of this development.

### 1.2.3 Singapore

The completion of the Integrated Resorts in Singapore in 2009 and 2010 will boost Singapore's economy in light of the recent global recession. There will be two main sites namely the Marina Bay Sands (completion in 2009) and the Resorts World at Sentosa

(completion 2010). The Integrated Resorts project is expected to bring together greater structural development in the HRI sector with more food and beverage establishments and increase the demand for food and beverage products.

#### 1.2.4 Vietnam

Vietnam is still a poor country with US\$ 900 GDP per capita income in 2008. However the country's economy has achieved an average growth rate of 8.1% during 2004-2008. In the major cities of Hanoi City and Ho Chi Minh City, GDP per capita reached US\$ 1.500 and US\$ 2.500 respectively in 2008.

Of Vietnam's 86 million people, 26% are below 15 years of age and 54% are below 30 years of age. This is leading to growing demand for fast moving consumer products in general and food and beverages products in particular. Apart from the main economic hubs of Hanoi and Ho Chi Minh City, there is also growing demand for Western style goods and services in the emerging urban cities of Nha Trang, Danang, Vung Tau, Haiphong, Bien Hoa and Can Tho.

Vietnam annually receives some four million overseas visitors and has been an attractive investment point for international high-end resorts and hotels conglomerates. Increases in tourism, combined with the growing local expatriate community in major urban cities, and the return home of Vietnamese wanting to establish businesses after studying overseas, are all driving the increased demand for imported food and beverages.

Vietnamese consumers are now more and more aware of food safety. Recent issues have made them very cautious of China and/or locally made food and beverage products and this has created more sales opportunities for foreign imported goods which are considered safer, cleaner and better quality by the majority of Vietnamese shoppers.

Shopping at wet, open markets and street stalls is still the dominant way of buying food and beverage products in Vietnam though this trend is starting to change. Many more people, especially 3-5 member families, now tend to buy more products from supermarkets and convenience stores than ever before. Although Vietnam's retail sales market is not huge, valued at US\$ 55 billion in 2008, it has grown at an average rate of 20% annually.

Internationally established wholesalers, retailers and convenience store developers such as Metro Cash & Carry Vietnam, Saigon Co.op, Citimart (Dairy Farm Hong Kong), Maximark, Lotte Shopping Vietnam, Bourbon, Shop & Go, Fivimart, etc) have expanded their network of outlets rapidly in major urban cities throughout the country. Besides, numerous international retailers and wholesalers like Wal-mart (USA), Tesco (the UK), Carrefour (France) have studied the Vietnamese retail market seriously in preparation for setting up a presence there in the near future.

As the country continues to open up and grow, with more modern shopping networks especially supermarkets and convenience stores, the more it will benefit the sales of foreign imported food and beverage products.

## 1.3 Competitive Environment

### 1.3.1 Indonesia

Imported products targeted for the HRI sector are dominated by a few key suppliers who both import and distribute to most of the key cities. Sub-distributors are generally used for other areas. Imported products from New Zealand mostly comprise meat, dairy products and fruit. Local meat supplies around 65 percent of demand and restrictions that limit the number of qualified countries Indonesia can import halal BSE free meat from has meant New Zealand has benefited although there have been temporary meat bans and halal issues from time to time. Indonesia imports 70% milk of its milk due to an insufficient local supply. However, a recent 5 percent import tariff has been re-imposed as a way to help prevent local milk prices from falling.

The Indonesian HRI sector is extremely diverse, consisting of hotels and restaurants that serve local and international cuisine, fast food outlets, cafés and bars, small restaurants, street-side open air restaurants known and street vendors.

Imported foods are used mainly by the 4 and 5 star hotels catering to the tourist industry, high end restaurants and cafés and bars specialising in Western and other non-Indonesian foods. The local restaurants and caterers tend to purchase local products.<sup>3</sup>

There has been rapid growth in both demand and supply of Western style fast food outlets, although roadside stalls and kiosks still dominate the food service industry. Approximately one-third of Indonesians claim to eat fast-food at least once a week. The most popular fast food outlets are those which serve chicken or pizza. Fast-food outlets benefit from their affordability and the popular perception that they maintain high standards of hygiene. The industry is currently led by FastFood Indonesia, which has the licence to operate outlets of a US-based chain, Kentucky Fried Chicken.<sup>4</sup>

### 1.3.2 Malaysia

In Malaysia the 3 star to 5 star hotels have one or more restaurants ranging from mid to high end depending on the rating of the hotel. These restaurants are usually targeted at the hotel guests although other food and beverage outlets within hotels for example buffet restaurants, Chinese restaurants, fine dining western restaurants and bars also target local people. For weekdays their main customers are business people and the working group, while on weekends families fill those restaurants. Four and 5 star hotels also generate revenue from banquets associated with weddings, company dinners and corporate functions. The majority of the 5 star hotels are located in Kuala Lumpur and the surrounding suburbs and in the tourist areas of Pinang, Melaka and Langkawi Island.

The restaurant sub-sector, which excludes hotel restaurants, accounted for 70 percent of the total food service sales in 2007. This is followed by the hotels and resorts (8%) and catering services to institutions (19%). Other sub-sectors include food stalls and food courts, which mainly serve relatively cheap local dishes. Currently the tourism industry is Malaysia's

second largest foreign exchange earner and growth in tourism is leading to the growth of restaurants offering international cuisines.

The total food service sector is valued at approximately US\$5.5 billion and caters to a market of 28 million locals and 21 million tourists per year.<sup>14</sup>

### 1.3.3 Singapore

The HRI sector is made up of a range of outlets, including street stalls, small family-run restaurants and chains. Restaurants dominate this sector but the majority of businesses are single-site.

In a developed industry like the HRI sector there are a number of major suppliers covering different sub-sectors such as meat, seafood, fruits, vegetables, chilled products, dried food, beverages, dairy products, desserts/dessert mixes and delicatessen products. Some of the major players in the HRI industry include Fraser & Neave (F&N), Asia Pacific Breweries (APB), Singapore Food Industries (SFI), Angliss, Nestle, Frosts Foods and Beverages and Indoguna.

The HRI sector is highly cost-conscious, partly due to the saturation of the industry with local and overseas suppliers. Buyers are spoilt for choice and tend to be very price sensitive, especially when the brand is new or unknown to the market. New Zealand companies must be prepared to price products competitively to respond to international competition.

### 1.3.4 Thailand

As part of the trend towards reduced time for household food preparation and in tandem with rising incomes, the food service sector has been growing strongly. Western-style food and fast-food sectors are now well established. Indeed, McThai operates 90 McDonald's fast-food restaurants and is planning to open 50 more outlets over the next five years. Minor Food Group (MFG) is a major operator of "quick-serve" restaurants and is also planning expansion. The tourism sector accounts for a significant proportion of food service revenue, but street stalls are currently estimated to account for three-quarters of sales.<sup>9</sup>

### 1.3.5 Vietnam

The sector is highly fragmented and undeveloped, with the demand for such services largely met by hawkers and street vendors. However, rising disposable incomes have resulted in growing demand for other food services such as restaurants, in particular Western-style fast-food outlets. Growth in tourism is also driving development in the HRI sector.

There is likely to be strong growth in the fast-food sector which is still in its infancy compared with some other countries in the region. Currently, there are only three major foreign fast-food companies operating in the country, namely Jollibee of the Philippines, Lotteria of South Korea and Yum Brands of the US, which operate Pizza Hut and KFC restaurants.

### 1.3.6 Trade information

**Table 2** Imports – Total food and beverage imports into SEA in US\$ for 2004-2008<sup>15</sup>

Imports (US\$ in billions)	2004	2005	2006	2007	2008
Indonesia	4.42	4.56	5.21	7.85	9.07
Malaysia	5.75	5.84	6.78	8.54	11.11
Singapore	5.04	5.40	6,05	7.27	8.72
Thailand	4.25	4.77	5.11	6.63	8.79
Vietnam	1.88	2.31	2.75	3.99	3.99

#### Indonesia

Top F&B imports: cereals, sugars, dairy, oils

Imported from: USA, Australia, Thailand and China (NZ 8<sup>th</sup>)

#### Malaysia

Top F&B imports: cocoa beans, corn, cane/beet sugar, concentrated milk and cream.

Imported from: Indonesia, Thailand, India and Australia (NZ 8<sup>th</sup>)

#### Singapore

Top F&B imports: ethyl alcohol, wine, concentrated milk and cream, other food preparations.

Imported from: Malaysia, France, Australia and Thailand (NZ 10<sup>th</sup>)

#### Thailand

Top F&B imports: frozen fish, soya-bean oil extracts, soybeans, concentrated milk and cream.

Imported from: US, Brazil, China and Australia (NZ 9<sup>th</sup>)

#### Vietnam

Top F&B imports: milk and dairy products, fats and oils

Imported from: China, India, Thailand and Argentina

**Table 3** New Zealand total food and beverage exports to SEA in NZ\$ for 2004-2008<sup>15</sup>

Imports (NZ\$ in millions)	2006	2007	2008	% Change 08/07
Indonesia	423.41	580.64	740.70	27.57
Malaysia	352.78	503.67	682.59	35.52
Singapore	286.39	365.17	472.87	29.49
Thailand	312.81	366.48	443.80	21.00
Vietnam	166.11	249.67	158.37	-36.57

For all but one of the five countries in this group there has been a steady increase in exports of F&B. The decline in exports to Vietnam in 2008 was due to a large drop in dairy exports.

## 2.0 REGULATORY OVERVIEW

### 2.1 Duties/Taxes

#### 2.1.1 Indonesia

Customs has tightened the verification, auditing and inspection procedures of imported products to prevent the entry of imports with unsupported documents. The action was taken in 2007 to address problems regarding customs procedures and valuation and the irregular and non-transparent fees required getting shipments released. In addition, at the end of 2007, GOI established its National Single Window program to improve the process for reviewing export and import documentations.

Indonesian bound tariff rates on major food and agricultural items generally range from 5 to 40 percent. Import duties for a number of processed food products range from 5 to 15 percent. The highest duty applied is to imported alcoholic beverages where duties range from 40 to 150 percent and to vehicles where general import duties can reach up to 50%.

The government levies a 10 percent value-added tax on the sale of all domestic and imported goods. A regulation introduced in 2007 states that value added tax is exempted for certain strategic products, such as corn, meat, poultry, egg and fresh milk. A luxury tax ranging from 40 to 75 percent is also levied on alcoholic beverages.

For imports, these taxes are collected at the point of import and are calculated on the landed value of the product, including import duties. Sales tax is 2.5 percent and excise for alcoholic beverage and alcoholic concentrate ranges between Rp.2,500-50,000/liter (approximately 25 cents to \$5), depending on the percentage of ethyl alcohol content.<sup>3</sup>

New Zealand has concluded a free trade agreement with the ASEAN countries including Indonesia. To look up the current and phased tariffs for New Zealand products entering Indonesia under the agreement establishing the ASEAN-Australian-New Zealand free trade area (AANZFTA), use the tariff finder on [www.asean.fta.govt.nz](http://www.asean.fta.govt.nz).

The Indonesian Customs website is: [www.beacukai.go.id](http://www.beacukai.go.id) and an official Indonesian Customs Tariff Book 2009 is available.

Items in the Customs Tariff Book are structured according to the Harmonized system (HS) as required by the World Customs Organization and member of ASEAN and include Common Effective Preferential Tariff (CEPT) for AFTA. The item codes, description and tariffs are also available in English.

#### 2.1.2 Malaysia

New Zealand signed a free trade agreement with the ASEAN countries including Malaysia in February 2009. To look up the current and phased tariffs for New Zealand products entering

Malaysia under the agreement establishing the ASEAN-Australian-New Zealand free trade area (AANZFTA), use the tariff finder on [www.asean.fta.govt.nz](http://www.asean.fta.govt.nz).

In May 2009, New Zealand concluded a bilateral free trade agreement with Malaysia. It is likely to be signed later this year with entry into force in 2010. Any changes to tariffs, including improvements to those agreed under the AANZFTA agreement, will be publicised at the time of signature by the Ministry of Foreign Affairs and Trade.

### 2.1.3 Singapore

Since 2001 New Zealand's exports to Singapore have been able to enter duty-free. However, an excise tax on imports of alcohol, which apply to imports from all countries, continues to apply to New Zealand. A list of the duty rates for alcohol is available on the Singapore Customs website:

[www.customs.gov.sg/leftNav/trad/val/List+of+Dutiable+Goods.htm](http://www.customs.gov.sg/leftNav/trad/val/List+of+Dutiable+Goods.htm)

There is a goods and services tax (GST) assessed on the CIF + duty value of the product. The GST was increased from five to seven percent on 1 July 2007.

### 2.1.4 Thailand

The implementation of the Closer Economic Partnership Agreement between New Zealand and Thailand on 1 July 2005 provides duty free access for more than half of New Zealand's exports to Thailand. The remaining barriers will phase out in stages with the last tariffs and quotas to be removed in 2025. Nonetheless, a special agricultural safeguard (SSG) is applied to some products exported to Thailand.

Details of the tariff rates and the reduction schedule is available on the New Zealand Ministry of Foreign Affairs website (Annex 1.1)

[www.mfat.govt.nz/Trade-and-Economic-Relations/0--Trade-archive/0--Trade-agreements/Thailand/0-cep-index.php](http://www.mfat.govt.nz/Trade-and-Economic-Relations/0--Trade-archive/0--Trade-agreements/Thailand/0-cep-index.php)

New Zealand has also concluded a free trade agreement with the ASEAN countries including Thailand. To look up the current and phased tariffs for New Zealand products entering Thailand under the agreement establishing the ASEAN-Australian-New Zealand free trade area (AANZFTA), use the tariff finder on [www.asean.fta.govt.nz](http://www.asean.fta.govt.nz). The tariff rates may be more favourable than under the Closer Economic Partnership Agreement so it is worth comparing both agreements.

### 2.1.5 Vietnam

Vietnam became a member of the World Trade Organization (WTO) in January 2007 and has agreed to a range of tariff and quota reductions. However, tariffs are still high for many food and beverage products, particularly alcoholic beverages.

New Zealand has concluded a free trade agreement with the ASEAN countries including Vietnam. To look up the current and phased tariffs for New Zealand products entering

Vietnam under the agreement establishing the ASEAN-Australian-New Zealand free trade area (AANZFTA), use the tariff finder on [www.asean.fta.govt.nz](http://www.asean.fta.govt.nz).

## 2.2 Regulatory requirements

### 2.2.1 Indonesia

All processed food products need to be registered with the Department of Health and given a DEPKES number. This number must be shown on the product labels. Imports of fresh and frozen foods (including meat, fruits, etc) require an accompanying phytosanitary certificate declaring that a product is suitable for human consumption. Processed imported food products for sale will require a registration number ('ML' number) issued from Indonesia's food and safety authority (BPOM).

Regulations often change and requirements sometimes overlap with different ministries making it complicated and likely that multiple copies of documents may be required in certain instances. Experienced importers are generally able to advise and guide. The following documents are generally required by importers for processed food products exported from New Zealand:

- free sale certificate
- letter of agreement/letter of authorization
- certificate of analysis
- certificate of analysis of raw material specifications
- product specification
- flow chart of production
- formula/ingredients

The registration process can be lengthy, bureaucratic and costly, so it is best to use a local agent.<sup>3</sup>

Prior to the shipment of live animals to Indonesia, a strict health protocol must be followed by the New Zealand Government and the Indonesian Directorate General of Livestock Services.

### 2.2.2 Malaysia

The Food Act 1983 and the Food Regulations 1985 of Malaysia govern the various aspects of food quality control including food standards, food hygiene, food import and export, food advertisement and accreditation of laboratories. There are specific compositional and labelling requirements for particular food products.

The Food Safety Information System of Malaysia provides details of the Malaysia's Food Act and Regulations and the food importation process: <http://fsis.moh.gov.my/fqc/>

Halal requirements and certification

All beef and poultry products must be certified halal and the products must originate from slaughterhouses that have been inspected and approved by the Malaysian authorities. An

Islamic Centre approved by the Malaysian Department of Veterinary Services must supervise the slaughter and processing and issue the halal certificate for meat and poultry.  
<http://agrolink.moa.my/jph/dvs/kav/halal/h-newzealand.html>

Further information on Malaysia's food regulations, quotas and licenses can be found on New Zealand Trade and Enterprises' Doing Business in Southeast Asia website  
<http://asean.nzte.govt.nz/Malaysia/14907.aspx>.

### 2.2.3 Singapore

The Food Control Division (FCD) of the Agri-Food and Veterinary Authority of Singapore (AVA) oversees food safety, licensing, inspection and import control. Importers of most food and beverage products are required to register with the AVA and for some products, such as meat, imports can only come from sources approved by the AVA.

Detailed information about import requirements, procedures and fees and also food labelling requirements, is available on the AVA website:  
[www.ava.gov.sg/](http://www.ava.gov.sg/)

### 2.2.4 Thailand

Thailand's food industry is governed by the Food Act of B.E. 2522 (1979) and subsequent laws stipulated by the Ministry of Public Health. The Food Act classifies food into four main categories as follows:

- specific-controlled food – registration is required for food in this category. Legal provisions are established regarding standard quality, specifications, packaging and labelling requirements as well as other aspects of good manufacturing practice. At present, 17 types of food have been listed in this category.
- standardised food – the category for which quality standards will be defined by regulations. Standardised food does not require registration but its quality and labelling have to meet the standard requirements as specified in the Notification of the Ministry of Public Health. There are 27 types of food in this category.
- food required to carry standard labels – raw or cooked, preserved or non-preserved, processed or non-processed – if not listed under category 1 or 2 – will be considered as labelled food. Food in this category maybe subdivided into (a) notified labelled-food and (b) non-notified labelled food.
- general food – raw or cooked, preserved or non-preserved, processed or non-processed, if they are not listed under category 1, 2, or 3 will be considered as general food. Although registrations are not required, general food products are controlled and monitored on hygiene, safety, labelling and advertising.

The Thai Food and Drug Administration website provides details of the relevant laws and regulations and importation process:  
[www.fda.moph.go.th/eng/index.stm](http://www.fda.moph.go.th/eng/index.stm)

## 2.2.5 Vietnam

Vietnam's legal and regulatory environment is undergoing significant change following its accession to the WTO in January 2007 and this is likely to lead to greater government transparency and trade liberalisation in the near future.

Currently, food and drinks products are subject to inspection before being cleared at Customs stations. The inspection is based on Vietnamese standards and should be carried out by an independent Vietnamese or authorised foreign inspection organisation based in Vietnam. The inspection covers quality, specifications, quantity and volume.

On December 19, 2007 the Vietnam Ministry of Health issued Decision No. 46/2007/QD-BYT which came into effect in September 2008, which specifies the maximum levels of biological and chemical contamination in food. The United States Department of Agriculture has published an unofficial translation of the Decision which is available here [www.fas.usda.gov/gainfiles/200808/146295388.pdf](http://www.fas.usda.gov/gainfiles/200808/146295388.pdf).

Vietnam is working to update the Food Safety Ordinance ratified in 2003 to Vietnam's Food Safety Law. The final law draft is expected to be submitted to the National Assembly by June 2009 with final ratification by June 2010 and implementation late 2011. The new law is based largely on existing international standards or CODEX standards. Regulations on imported food and drinks products are currently no different to those applied to domestically produced food products. Therefore, imported food products that meet international standards are usually permitted for import.

As Vietnam's legal and regulatory environment is currently undergoing significant change, New Zealand exporters are advised to stay in touch with their importers on these issues.

## 2.3 Labelling requirements

### 2.3.1 Indonesia

Food labelling is required. Requirements for labelling of food products are broad in scope. At the end of 2003, the head of BPOM published guidelines food labelling. However, many of these requirements are still not enforced. Halal certification and labelling is not mandatory at this time but these guidelines are also under review. Given that almost 90 percent of the population professes the Islamic faith, it is highly recommended that halal certification be obtained. These must be approved by the Indonesian Muslim Council (MUI) to issue halal certificates.<sup>3</sup>

The National Agency for Food And Drugs (BPOM) website is : [www.pom.go.id/](http://www.pom.go.id/). Four PDF versions of regulations are available in English from their website: [www.pom.go.id/e\\_public/hukum\\_perundangan/default.asp](http://www.pom.go.id/e_public/hukum_perundangan/default.asp) and includes information regarding food labelling and advertisement. The general requirements for food labelling include the need for information on:

- the name of the product

- list of materials used
- net weight or net contents
- name and address of the party which produces or imports the food into the territory of Indonesia
- information on 'halal'
- the expiry date, month and year.

The government is also able to determine other information which must or is prohibited in mentioning on food labels and must be written in the Indonesian language, Arabic symbols and Latin letters.

Further information on labelling requirements can be found on New Zealand Trade and Enterprise's website on Doing Business in Southeast Asia  
<http://asean.nzte.govt.nz/Indonesia/14877.aspx>

### 2.3.2 Malaysia

Because over half the Malaysian population is Muslim, labelling requirements for products containing pork and alcohol are very strict. Labelling requirements specify that food items may be labelled in either Malay or English and must contain the following information:

- a description of the product
- a list of ingredients, in descending order of proportion by weight
- a statement as to the presence of any animal products (e.g. meat, gelatins)
- if the product contains any alcohol, a statement indicating this
- the minimum net weight of the product
- the name and address of the manufacturer
- the name and address of the importer (which can be added at the time of import)
- a statement of shelf life or expiry dates. (USDA)

### 2.3.3 Singapore

Under Singapore's food regulations, all pre-packed food products for sale in Singapore must be labelled with the following basic information in English:

- the name or description of the food
- a list of ingredients
- the net quantity
- the name and address of the manufacturer or importer
- the country of origin of the product.

Some products are also required to be labelled with the expiry date of the food. A list of the products required to be labelled with an expiry date and also requirements relating to claims that can be made on food labels are available on the AVA website:

[www.ava.gov.sg/](http://www.ava.gov.sg/)

### 2.3.4 Thailand

Labels for food products that are sold directly to customers must be in Thai and are required to have the following information:

- name of the food
- registration number
- name and address of manufacturer
- net content of the food in metric system
- a list of the main ingredients as a percentage of the total, in descending order.
- any additives used (e.g. preservatives, flavours, sweeteners)
- manufacturing and expiry dates
- health and nutritional claims, if any.

### 2.3.5 Vietnam

On August 30th, 2006, the Vietnamese government signed a new decree on goods labelling, Decree No. 89/2006/ND-CP, and on April 6th, 2007, the Vietnam Ministry of Science and Technology issued Circular No. 09/2007/TT-BKHCHN providing guidance on the implementation of the Goods Labelling Decree No. 89/2006/ND-CP. Labels for simple unprocessed food must contain:

- quantity
- production date
- expiry date.

Labels for processed food must contain:

- quantity
- production date
- expiry date
- composition or quantified composition
- information, warning of safety and hygiene
- instructions on preservation and use.

Labels for food ingredients must contain:

- quantity
- production date
- expiry date
- quantified composition
- instructions on use, preservation.

The United States Department of Agriculture has published an unofficial translation of the decree, which is available here: [www.fas.usda.gov/gainfiles/200706/146291321.pdf](http://www.fas.usda.gov/gainfiles/200706/146291321.pdf)

A translation of circular No. 09/2007/TT-BKHCHN is available on the website of the General Department of Vietnam Customs at:

[www.customs.gov.vn/English/Lists/Documents/ViewDetails.aspx?ID=982](http://www.customs.gov.vn/English/Lists/Documents/ViewDetails.aspx?ID=982)

## **3.0 MARKET ENTRY CONSIDERATIONS**

### **3.1 Indonesia**

Indonesia is a relationship driven market and it can take 12 months or more to research the market and find potential partners before sales commence. You need to be committed and willing to set aside sufficient resources to get through the market entry phase and while emails, skype and tele-conferencing are gaining in popularity, often things don't move until the New Zealand company is physically in the market. You need to be prepared to visit the market to get your business underway.

Speaking to Indonesian importers can help to avoid many mistakes as Indonesian regulations, particularly those related to food, are often unclear, confusing and regularly change. The distribution system is complex and infrastructure is still inadequate, especially outside big cities and the island of Java so the ability to move frozen and refrigerated products is limited. There are 10 major cities in Indonesia that serve as distribution hubs and products generally move to warehousing distribution facilities in the hubs, then to sub-distribution and wholesalers for delivery to retailers.

If you want to manage your business in-market you can use locally based agents and distributors. Further information on market entry considerations and appointing distributors or agents can be found on New Zealand Trade and Enterprise's Doing Business in Southeast Asia website <http://asean.nzte.govt.nz/Indonesia/14878.aspx>.

### **3.2 Malaysia**

New Zealand exporters should look to work with appropriately sized importers/distributors and ensure that they have established distribution into targeted sectors. Initially this could mean considering specialist distributors servicing the HRI sector. It is recommended that New Zealand suppliers establish separate distribution in East Malaysia – particularly the cities of Kuching and Kota Kinabalu – to capture the tourist market.

Approximately 60 percent of Malaysia's population is Muslim and halal is becoming recognised as the benchmark for quality and safety for a wide range of food products, not just meat-based products. Therefore, food products that have halal certificates have added marketing value in Malaysia. Conversely, products that contain non-halal ingredients will exclude a large percentage of the population as potential customers.

Malaysians are aware of the clean green image of New Zealand and suppliers should continue to capitalise on this. Food safety issues are becoming increasingly important for consumers.

During the economic downturn, New Zealand companies already in the market should work more closely with their distributors to further enhance their brands and gain confidence from customers. For new companies interested to enter Malaysia, they should find a niche area to

work with because it will be difficult to break into a commodity business where price has now become the main determinant of procurement.

Further information can be market entry considerations and on appointing distributors or agents can be found on New Zealand Trade and Enterprise's Doing Business in Southeast Asia website <http://asean.nzte.govt.nz/Malaysia/14908.aspx>

### **3.3 Singapore**

Recognising the size and resources of most New Zealand companies, the most effective entry strategy is to appoint a capable local distributor. Adopting a group strategy (a network of different product suppliers coming together) can also be effective, especially for small companies. Promotions at hotels and restaurants are also common and should be considered as a means of achieving recognition.

With regard to long-term considerations, establishing a presence in the market is extremely advantageous in building the brand and reputation as well as responding faster to opportunities presented in the local market and obtaining contacts.

New Zealand has a strong reputation in some sub-sectors of the food and beverage industry, in particular, dairy, fruits and vegetables, wine and natural products. While New Zealand companies should continue to leverage on the clean and green image, they should also put effort into engaging and educating local buyers on the points of differentiation New Zealand products can offer.

The most effective distribution channel for most New Zealand companies, which lack the resources to establish a physical presence in Singapore, is to appoint a local distributor. It is therefore imperative for the New Zealand companies to engage a capable distributor with a well-established network and a good knowledge of local trends and demands.

Restaurants, hotels and institutions usually prefer to deal with local suppliers rather than importing directly from overseas.

Further information can be market entry considerations and on appointing distributors or agents can be found on New Zealand Trade and Enterprise's Doing Business in Southeast Asia website <http://asean.nzte.govt.nz/Singapore/14963.aspx>.

### **3.4 Thailand**

To compete most effectively, New Zealand companies need to be able to demonstrate a key point of differentiation. One point of differentiation is New Zealand's innovative and high quality food and internationally recognised food safety standards. At present, consumers are demanding food that is safe, healthy and convenient. They want assurances that the food they eat is free from contamination and harmful residues and are looking for innovative foods with added health benefits. And as life gets busier, they are demanding food that is quick and easy to prepare.

New Zealand companies should concentrate on higher value products and focus primarily on affluent consumers in order to avoid price competition. However, the key points of differentiation must be clearly demonstrated and educated to consumers through intensive and ongoing marketing and educational campaigns.

It is essential for exporters to have ongoing market promotion campaigns to attract and build new markets. Ongoing promotion and consumer and trade education is necessary for successful long term presence in the market. This is due to the fact that, although the high quality of New Zealand food and beverage products is well-known to Thai consumers, Thais generally are still unaware of the range of New Zealand's food and beverage products which are available.

There is a shift in the traditional distribution channels where the products are sold either to the importer and/ or to the distributor before being delivered to the retail or food service chains. However, during the initial stage of market penetration when the import volumes are small, it is typical for the retail chains, hotels and restaurants to use importers or a consolidator to source and import products.

Further information can be market entry considerations and on appointing distributors or agents can be found on New Zealand Trade and Enterprise's Doing Business in Southeast Asia website <http://asean.nzte.govt.nz/Thailand/14805.aspx>.

### **3.5 Vietnam**

The best way to enter the Vietnamese market is to develop a relationship with one of the established food trading companies working with hotels and restaurants. There are only a handful of well-organised food trading and/or distribution companies in Vietnam, so the selection process need not take too long. There is typically some sort of foreign involvement in each of the better-known companies. As these companies tend to be somewhat transient, it is advisable to visit Vietnam and research the company's customer lists and achievements.

Foreigners are currently not permitted to import or distribute food in Vietnam. Therefore, foreign companies must currently find a suitable local importer or distributor to work with.

Further information can be market entry considerations and on appointing distributors or agents can be found on New Zealand Trade and Enterprise's Doing Business in Southeast Asia website <http://asean.nzte.govt.nz/Vietnam/14865.aspx>

### **3.6 Sustainability**

The main focus is currently on business sustainability. However there are the beginnings of awareness for environmental issues amongst the business community<sup>16</sup>

The food and beverage industry focus is on food safety. But there is some attention to environmental issues, green production, product integrity and waste minimisation.

Food producers, processors and retailers are introducing traceability requirements and increasing the amount of information required on product labelling beyond that required by regulation. Retailers are also putting increasing pressure on their suppliers to guarantee product safety and develop traceability systems.

In the wine industry, there is already evidence of importers seeking guarantees from producers about the composition of wine.<sup>17</sup>

The preference for Western style convenience foods is increasing although the consumer awareness for environmentally friendly or green products is currently low.<sup>18</sup>

### 3.6.1 Indonesia

Environmental and sustainability issues are a new concept and there is currently no strong evidence of consumer interest in these issues, however there is a small segment of society that has a growing awareness of environmental pollution and energy efficiency. Some large international retailers such as Carrefour are incorporating environmental and sustainability practices at energy management level.<sup>21</sup>

### 3.6.2 Malaysia

The sustainability agenda in Malaysia has so far being taken on as a corporate social responsibility mainly by multinationals or large local corporates e.g. Shell, Philips, Nestle, Digi, KPMG, Opus Group, PriceWaterHouse Coopers, Malaysia Airlines, Maxis Communications and UMW.

The National Recycling Programme was introduced in 2000 which sets waste minimization as a priority. The legal framework and programmes dealing with municipal waste are established by local governments.<sup>19</sup> A new ruling has just been set by the Municipal Council of Kuala Lumpur to require each household in Kuala Lumpur to separate their waste to organic and inorganic starting 1<sup>st</sup> June 2009. This is one of the steps being taken by the Malaysian government to have a more orderly and effective management of waste and to encourage people to recycle.<sup>20</sup>

Malaysia has an eco-labelling program to influence the consumers' purchasing decisions. However, this program is still in its infancy.<sup>21</sup> Nevertheless, all the modern retail chains such as the supermarkets and hypermarkets have been encouraging shoppers to shop with their recyclable bags.

### 3.6.3 Singapore

Recent research commissioned by New Zealand Trade and Enterprise (Synovate 2009) found that consumers define sustainability as 'economic or environmental' sustainability followed by 'recyclable' ie a recyclable product. Companies claiming to be sustainable are expected to:

- minimise waste and pollution
- increase resource efficiencies (water, electricity etc)

- use recyclable/biogradable packaging and
- manufacture products that are recyclable.

Buying sustainable food is important and can be defined as:

- produced by a company with environmentally friendly production processes;
- natural;
- produced by a company that minimises waste;
- is organic.

When buying food Singaporean consumers are looking for information on:

- approval by a recognised organisation;
- country of origin (New Zealand is second only to Australia as being seen as a sustainable food producing country);
- information on nutritional attributes; and
- information on traceability that covers the origin, production and supply of the product.

Singapore's rapidly growing economy has seen substantial increases in the level of waste generated. Singapore has a Zero Landfill and Zero Waste Strategy which includes collaboration with companies in the packaging supply chain to develop voluntary agreements to recycle and reduce the amount of packaging.<sup>22</sup>

#### 3.6.4 Thailand

Thailand has a national integrated waste management plan. There is a take back scheme for end of life products, waste exchange programmes and a green purchasing network. Industries and businesses are engaged in recycling.<sup>23</sup>

#### 3.6.5 Vietnam

Like Indonesia, environmental and sustainability issues are a new concept and there is currently no strong evidence of consumer interest in these issues, however, there is a small segment of society that has a growing awareness of environmental pollution and energy efficiency. As an example, Metro Cash & Carry Vietnam is switching from free plastic bags to reusable plastic bags that must be purchased.

## 4.0 MARKET RESOURCES

### 4.1 Government

Indonesia Customs - [www.beacukai.go.id/](http://www.beacukai.go.id/)

Indonesia Food and Drug Control - [www.pom.go.id/e\\_default.asp](http://www.pom.go.id/e_default.asp)

Malaysia Customs - [www.customs.gov.my/](http://www.customs.gov.my/)

Malaysia Food Safety Information System - <http://fsis.moh.gov.my/fqc/>

Malaysia Department of Veterinary Services - <http://agrolink.moa.my/jph/dvs/import/>

Singapore Customs - [www.customs.gov.sg](http://www.customs.gov.sg)

Statistics Singapore – [www.singstat.govt.sg](http://www.singstat.govt.sg)

Singapore Agri-Food & Veterinary Authority - [www.ava.gov.sg](http://www.ava.gov.sg)

Thailand Customs - [www.customs.go.th/Customs-Eng/indexEng.jsp](http://www.customs.go.th/Customs-Eng/indexEng.jsp)

Thailand Food and Drug Administration - [www.fda.moph.go.th/eng/index.stm](http://www.fda.moph.go.th/eng/index.stm)

Vietnam Customs - [www.customs.gov.vn](http://www.customs.gov.vn)

## **4.2 Industry**

Indonesia – Food and Beverage Organisation - [www.gapmmi.or.id/](http://www.gapmmi.or.id/)

Malaysian Association of Hotels - [www.hotels.org.my](http://www.hotels.org.my)

Singapore Hotel Association - [www.sha.org.sg/](http://www.sha.org.sg/)

Singapore Integrated Resorts (Marina Bay) – [www.marinabaysands.com](http://www.marinabaysands.com)

Singapore Integrated Resorts (Sentosa) – [www.rwsentosa.com](http://www.rwsentosa.com)

Thailand Hotels Association - [www.thaihotels.org/](http://www.thaihotels.org/)

Vietnam Tourism - [www.vietnamtourism.com/](http://www.vietnamtourism.com/)

## **4.3 Trade publications**

Asia Food Journal - [www.asiafoodjournal.com](http://www.asiafoodjournal.com)

## **4.4 Trade events**

Food Hotel and Tourism Bali - [www.fhtbali.com/](http://www.fhtbali.com/)

Food and Hotel Malaysia - [www.foodandhotel.com](http://www.foodandhotel.com)

Food and Hotel Asia (Singapore) - [www.foodnhotelasia.com](http://www.foodnhotelasia.com)

Food and Hotel Vietnam - [www.foodnhotelvietnam.com/](http://www.foodnhotelvietnam.com/)

## **4.5 Additional resources**

New Zealand Trade and Enterprise's Doing Business in Southeast Asia website  
[www.asean.nzte.govt.nz](http://www.asean.nzte.govt.nz)

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- <sup>1</sup> Economist Intelligence Unit estimate. Data Services Alacra Database
- <sup>2</sup> Datamonitor. Consumer Products Database.
- <sup>3</sup> US. Department of Agriculture. *Indonesia Exporter Guide Annual 2008*. November 2008.
- <sup>4</sup> Economist Intelligence Unit. *Indonesia Food, Beverages And Tobacco Sub-sector Update 26<sup>th</sup> March 2009*.
- <sup>5</sup> Economist Intelligence Unit. *Malaysia Food, Beverages And Tobacco Sub-sector Update, 12th December 2008*.
- <sup>6</sup> BIS Shrapnel. *Foodservice strategies in South East Asia 2006-2010*. November 2006.
- <sup>7</sup> Economist Intelligence Unit. *Singapore Food, Beverages and Tobacco : Sub-sector Update, 19 February 2009*.
- <sup>8</sup> Agriculture and Agri-Food Canada. *Agri-food Past, Present and Future : Singapore, April 2007*.
- <sup>9</sup> Economist Intelligence Unit. *Thailand Food, Beverages and Tobacco : Sub-sector Update, 13 November 2008..*
- <sup>10</sup> US. Department of Agriculture. *Thailand Exporter Guide 2008*. December 2008.
- <sup>11</sup> Economist Intelligence Unit. *Vietnam Food, Beverages and Tobacco : Sub-sector Update, 19 December 2008*.
- <sup>12</sup> US. Department of Agriculture. *Exporter Guide 2008*. September 2008.
- <sup>13</sup> NZTE Office, Jakarta.
- <sup>14</sup> US. Department of Agriculture. *Malaysia HRI Food Service Sector 2009*. January 2009.
- <sup>15</sup> World Trade Atlas. Product Group F&B (HS codes – 02-05, 07-23, 35)
- <sup>16</sup> Parasnis, Mandar. *Asian Retail Sector and Sustainability : Status Report for Indonesia, Malaysia & the Philippines. Presentation*. United Nations Environment Programme (UNEP), December 2005.
- <sup>17</sup> Australian Wine Industry Stewardship. *Trends in environmental assurance in key Australian wine export markets*. March 2007.  
[www.wfa.org.au/PDF/OTC07.pdf](http://www.wfa.org.au/PDF/OTC07.pdf)
- <sup>18</sup> Economist Intelligence Unit. *Consumer Goods and Retail Forecast*. 2008.
- <sup>19</sup> *Senior Officials meeting on the 3R Initiative*. Malaysia Report, 2006.  
[www.env.go.jp/recycle/3r/en/s\\_officials/03/07.pdf](http://www.env.go.jp/recycle/3r/en/s_officials/03/07.pdf)
- <sup>20</sup> Separate Your Waste (29 April 2009) *The Star Online*.  
<http://thestar.com.my/metro/story.asp?file=/2009/4/29/central/3782260&sec=central>.
- <sup>21</sup> United Nations Environment Programme (UNEP). *Asian Retail Sector and Sustainability : Status Report for Indonesia, Malaysia & the Philippines. Final report*. December 2005.
- <sup>22</sup> Singapore. Ministry of the Environment and Water Resources (MEWR). *Singapore Green Plan 2012*. 2007  
[www.mewr.gov.sg/sgp2012/index.html](http://www.mewr.gov.sg/sgp2012/index.html)
- <sup>23</sup> *Efforts of Local Companies in Thailand to Green Their Purchasing*. Thailand Environmental Institute. Presentation by Pongvipa Lohsomboon  
[www.city.sendai.jp/kankyoku/kanri/icgps-e/pdf/3-2.pdf](http://www.city.sendai.jp/kankyoku/kanri/icgps-e/pdf/3-2.pdf)