

# **Asian Region Food Strategy Review – Annual 2008**

Prepared by:

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**1. Asia saw high rates of economic growth again in 2007**

Asia has again reported stunning economic growth in 2007 (see Table below). Only Thailand, which was under the economic management of a Junta for the whole year, fell short of its original forecast. Indonesia confirmed that it has finally emerged from the wreckage of its 1998 political and economic crisis to become one of ASEAN’s future economic engines.

ASEAN took a further step forward towards solidifying itself as a regional economy with the signing of ASEAN Charter and the adoption of the blueprint for a future ASEAN Economic Community (AEC), South East Asia’s single market. ASEAN’s regional food regulatory system harmonisation project continued throughout 2007.

<b>Asia’s Recent Economic Growth Performance</b>					
<b>Country</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007 *</b>
	%	%	%	%	%
ASEAN					
□ Indonesia	4.4	4.7	5.1	5.6	6.3
□ Malaysia	5.8	6.8	5.0	5.9	6.1
□ Philippines	4.9	6.4	4.9	5.4	6.7
□ Singapore	3.1	8.8	6.6	7.9	7.5
□ Thailand	7.1	6.3	4.5	4.9	4.3
□ Vietnam	7.2	7.8	8.4	8.3	8.4
China, People’s Republic	10.0	10.1	10.4	10.7	11.4
India	8.5	7.5	8.4	9.4	7.8

Source: National governments and Asian Development Bank

This economic growth continued to drive demand for imported food all across the region. Overall, the Asian markets for imported food were growing at close to 18% per annum over the period from 2002 to 2006 (see Table below).

<b>Growth in Imports of Food to Asia</b>			
	<b>2002</b>	<b>2006</b>	<b>% Annual Change</b>
	US\$ ‘000	US\$ ‘000	
ASEAN – 8	15,923	25,795	12.4%
China *	8,958	21,369	27.7%
India	3,191	5,979	17.5%
Total	28,072	53,143	17.8%

ASEAN – 8 excludes data for Cambodia and Laos.  
 \*: China data includes Taiwan but excludes Hong Kong and Macau SARs.  
 Source: Official External Trade Statistics

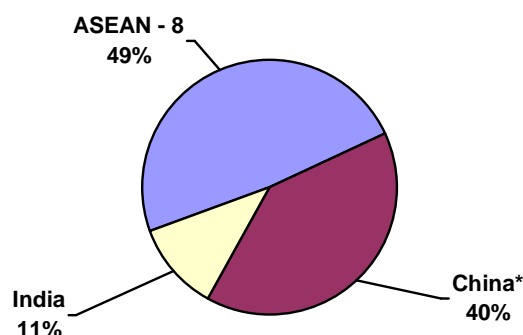
China saw a surge in growth underpinned by the world's fastest economic growth. The smaller India market saw growth at amongst 17% driven by market liberalisation and rapid economic growth. Growth in imports to ASEAN also grew rapidly at just over 12% per annum on the back of its more developed markets for imported foods. Vietnam saw Asia's most rapid growth in imports at an average rate of close to 57% per annum over the period.

## **2. ASEAN still dominates Asia's market for imported food**

Today, all of the major markets in Asia comprise a collection of well dispersed wealthier cities across the region. Only Malaysia has developed what could be described as a truly national market similar to that in Developed Nations. India, China and the other large ASEAN nations have their key demand centres in their major cities, e.g. Mumbai, Bangalore, Shanghai, Beijing, Jakarta, Manila, Bangkok, Ho Chi Minh City, etc.

Asia's food imports increased to US\$ 53.1 billion in 2006, up from US\$ 28.1 billion in 2002. The ASEAN-8 countries, namely Brunei Darussalam, Indonesia, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam, continued to be the dominant market for imported products in the Asian region (see Chart below).

**Asia's Food Imports in 2006 – US\$ 53,143 Million**



ASEAN – 8 excludes data for Cambodia and Laos.

\*: China data includes Taiwan but excludes Hong Kong and Macau SARs.

Source: Official External Trade Statistics

China's booming economy and WTO liberalisation saw its share of Asia's market for imported foods increase to 40% in 2006, up from 32% in 2002. Major growth was also seen within ASEAN, with major increases in imports occurring in Vietnam and Indonesia.

## **3. The structure of imports depends on regulation and local agricultural activity**

### **3.1 Overview of the situation today**

The structure of imports varies across the region as a result of different market access barriers, competition from local agriculture and food and drink suppliers, and different demands from consumers (see Table below). Market maturity varies significantly from market to market across the region.

<b>The Structure of Asia's Food Imports in 2006</b>			
<b>Market segment</b>	<b>ASEAN-8</b> US\$ '000	<b>China *</b> US\$ '000	<b>India</b> US\$ '000
Meat and poultry	1,109,756	685,737	332
Fish and seafood	2,818,150	3,155,135	24,056
Dairy products, etc.	2,718,951	565,243	25,436
Vegetables	1,104,904	755,534	1,009,961
Fruits	1,316,732	738,562	824,240
Coffee, tea, spices	529,860	53,506	176,823
Cereals unprocessed	3,980,844	820,610	1,293,195
Milling industry products	807,451	246,703	14,437
Oilseeds, etc.	1,363,178	8,117,202	94,667
Fats and oils	1,672,445	3,920,275	2,263,483
Processed fish and meat	390,129	44,116	1,352
Sugar and its products	1,585,002	617,699	26,539
Cocoa and its products	1,197,280	183,235	29,792
Cereal/starch based preparations	1,144,311	359,325	26,544
Fruit and vegetable based preps	500,819	198,210	31,012
Miscellaneous food preparations	1,569,178	322,020	25,637
Drinks, non-alcoholic and alcoholic	1,975,380	585,782	111,370
<b>Total in US\$ '000</b>	<b>25,784,370</b>	<b>21,368,894</b>	<b>5,978,876</b>

ASEAN – 8 excludes data for Cambodia and Laos.  
 \*: China data includes Taiwan but excludes Hong Kong and Macau SARs.  
 Source: Official External Trade Statistics

ASEAN continues to have the most diverse market in Asia. Its top 5 import categories comprise only 51% of imports, when compared to 78% for China and 93% for India (see Table below). ASEAN's top 5 also includes drinks and some processed dairy products.

<b>Review of Top 5 Import Market Categories in 2006</b>					
<b>ASEAN - 8</b>		<b>China *</b>		<b>India</b>	
<b>Market segment</b>	<b>%</b>	<b>Market segment</b>	<b>%</b>	<b>Market segment</b>	<b>%</b>
Cereals, unprocessed	15.4	Oilseeds, etc	38.0	Fats and oils	37.8
Fish and seafood	10.9	Fats and oils	18.3	Cereals, unprocessed	21.6
Dairy products, etc	10.5	Fish and seafood	14.8	Vegetables	16.9
Drinks	7.7	Cereals, unprocessed	3.8	Fruits	13.9
Fats and oils	6.5	Vegetables	3.5	Coffee, tea and spices	2.9
<b>Total</b>	<b>51.0</b>	<b>Total</b>	<b>78.4</b>	<b>Total</b>	<b>93.1</b>

ASEAN – 8 excludes data for Cambodia and Laos.  
 \*: China data includes Taiwan but excludes Hong Kong and Macau SARs.  
 Source: Official External Trade Statistics

This situation is indicative of government policy towards freer import markets and other matters such as the strength of local food industries/capabilities to compete against imports.

### 3.2 ASEAN's food imports today and recent trends

ASEAN's food imports increased by about 12.4% per annum to US\$ 25.8 billion in 2006, up from US\$ 15.9 billion in 2002 (see Table below).

ASEAN- 8 Food Imports in 2002 and 2006			
Market segment	2002	2006	Annual Change %
	US\$ '000	US\$ '000	
Meat and poultry	705,448	1,109,756	11.4
Fish and seafood	1,802,730	2,818,150	11.2
Dairy products, etc.	1,617,866	2,718,951	13.6
Vegetables	675,173	1,104,904	12.7
Fruits	756,708	1,316,732	14.8
Coffee, tea, spices	355,898	529,860	9.8
Cereals unprocessed	2,921,535	3,980,844	7.3
Milling industry products	504,969	807,451	11.9
Oilseeds, etc.	1,227,072	1,363,178	2.2
Fats and oils	793,952	1,672,445	22.1
Processed fish and meat	367,787	390,129	1.2
Sugar and its products	822,848	1,585,002	18.5
Cocoa and its products	489,658	1,197,280	28.9
Cereal/starch based preparations	648,162	1,144,311	15.3
Fruit and vegetable based preps	388,102	500,819	5.8
Miscellaneous food preparations	934,774	1,569,178	13.6
Drinks, non-alcoholic and alcoholic	911,188	1,975,380	23.4
<b>Total</b>	<b>15,923,870</b>	<b>25,784,370</b>	<b>12.4</b>

ASEAN – 8 excludes data for Cambodia and Laos.  
Source: Official External Trade Statistics

The most rapid growth was seen in the markets for imported:

- Cocoa and its products, which includes chocolate confectionery;
- Drinks, non-alcoholic and alcoholic;
- Fats and oils;
- Sugar and its products, which includes sugar confectionery; and
- Cereal and starch based preparations, which includes biscuits, infant foods and breakfast cereals.

This situation arises because ASEAN now has a solid middle and upper income group that has demand for a wide range of processed food and drinks, including imported products. A sizeable number of these consumers lived through the speculative growth era of the 1990s and through the bad times after the Asian economic crisis. Today, they know what they like and have matured as a market.

A new generation of consumers has been developing in ASEAN under circumstances where economic growth has been less speculative than it was in the 1990s. Many of these persons are working for local businesses, which are, in many cases, economic drivers unlike in the 1980s and 1990s when there was very high reliance placed on foreign investment for jobs.

Analysts in ASEAN comment that what is happening in the ASEAN economies today is significantly “healthier” than the situation that existed in the 10 years prior to the Asian economic crisis of 1997/98. This “healthier” situation is expected to underpin growing demand for imported foods, especially processed food and drinks, over the next 5 years. It is also seen as a defence against the impact of a U.S. recession, should one occur in 2008.

### **3.3 China’s food imports today and recent trends**

China’s rapid economic growth over the past 5 years and liberalisation of its market under its WTO commitments underpins the most rapid growth in food imports in Asia. Its food imports increased by close to 28% per annum to US\$ 21.4 billion in 2006, up from about US\$ 9 billion in 2002 (see Table below).

<b>China’s Food Imports in 2002 and 2006</b>			
<b>Market segment</b>	<b>2002</b>	<b>2006</b>	<b>Annual Change</b>
	US\$ ‘000	US\$ ‘000	
Meat and poultry	626,936	685,737	1.9
Fish and seafood	1,564,549	3,155,135	20.3
Dairy products, etc.	272,233	565,243	21.5
Vegetables	194,194	755,534	57.8
Fruits	378,315	738,562	19.0
Coffee, tea, spices	23,133	53,506	26.3
Cereals unprocessed	481,760	820,610	14.1
Milling industry products	95,237	246,703	31.8
Oilseeds, etc.	2,777,080	8,117,202	38.5
Fats and oils	1,580,255	3,920,275	29.6
Processed fish and meat	19,447	44,116	25.4
Sugar and its products	279,695	617,699	24.2
Cocoa and its products	79,915	183,235	25.9
Cereal/starch based preparations	148,557	359,325	28.4
Fruit and vegetable based preps	109,694	198,210	16.1
Miscellaneous food preparations	179,262	322,020	15.9
Drinks, non-alcoholic and alcoholic	148,263	585,782	59.1
<b>Total</b>	<b>8,958,525</b>	<b>21,368,894</b>	<b>27.7</b>

\*: China data includes Taiwan but excludes Hong Kong and Macau SARs.  
Source: Official External Trade Statistics

The most rapid growth was seen in the markets for imported:

- Drinks, non-alcoholic and alcoholic;
- Vegetables;

- Oilseeds, which includes soybeans for human food, e.g. for locally made tofu, soymilk, etc.
- Milling industry products; and
- Fats and oils.

The very high rates of growth in Chinese imports do, however, obscure what has actually been happening in China. China's market has been growing from a very low base under circumstances where it is building up its own agricultural sectors and food and drink processing industry.

China's imports are focused mainly on dealing with shortfalls in local production. Unlike the tropical/subtropical ASEAN region, China's climate allows it to produce a wide range of products, including temperate climate products, e.g. wheat, barley, milk, fruits, etc. Many of these products cannot be produced within ASEAN. Even the production of meat in the tropics is a challenge when compared to temperate climate China.

The Chinese government's policy is oriented mainly around building a defence against imported products through the establishment of strong local food and drink industries. It has already achieving this in the dairy processing, fish and seafood processing and brewing industries and is working on this in other industries, e.g. meat, confectionery, snack-foods and, even, wine.

In many cases, processed foods have been imported to China as part of market tests undertaken before the products are launched into production at new factories in China. Some of these factories have both a China domestic market and an export market orientation. The value of China's food exports is still higher than imports. Exports were valued at US\$ 27.6 billion in 2006, when compared to imports at US\$ 21.4 billion in the same year.

Today, China is spending about US\$ 16 per head per annum on imported food. Spending on the same products in ASEAN is substantially higher at US\$ 46 per head per annum.

China's market for imported foods is not as diverse as the ASEAN market. Over 70% of imports involve soybeans for human food, edible oil inputs, vegetable oil, mainly palm oil, and fish and seafood supplies for its processing industry. Imports comprised just over 7% of total food and drink consumption in 2006.

Imports of processed food and drinks only amount to about 8% of China's imports in 2006. In ASEAN, the figure is around 20% of total imports.

The situation in China exists because of moderate to high import duties on processed foods, low personal incomes and very high levels of price sensitivity towards imported products in the supply chain from importer to consumer, competition from China-made products and weaknesses in the distribution channels for imported branded products. The situation in ASEAN is different because of more open markets, higher household incomes, more developed demand for imported brands and higher quality distribution channels for imported products.

### 3.4 India's food imports today and recent trends

The value of its food imports grew to close to US\$ 6 billion in 2006, up from about US\$ 3.2 billion in 2002. This equates to an average annual increase in spending on imports of around 17.5% (see Table below).

India's Food Imports in 2002 and 2006			
Market segment	2002	2006	Annual Change
India	US\$ '000	US\$ '000	%
Meat and poultry	76	332	67.4
Fish and seafood	8,110	24,056	39.3
Dairy products, etc.	17,419	25,436	9.2
Vegetables	627,321	1,009,961	12.2
Fruits	387,494	824,240	22.5
Coffee, tea, spices	120,907	176,823	9.1
Cereals, unprocessed	362	1,293,195	Very high
Milling industry products	4,013	14,437	51.9
Oilseeds, etc.	37,996	94,667	29.8
Fats and oils	1,861,888	2,263,483	4.3
Processed fish and meat	425	1,352	43.6
Sugar and its products	17,963	26,539	9.5
Cocoa and its products	14,496	29,792	21.1
Cereal/starch based preparations	23,892	26,544	2.2
Fruit and vegetable based preps	14,417	31,012	22.8
Miscellaneous food preparations	33,326	25,637	( 4.6)
Drinks, non-alcoholic and alcoholic	20,668	111,370	87.8
Total in US\$ '000	3,190,774	5,978,876	17.5
Source: Official External Trade Statistics			

The most rapid growth was seen in the markets for imported:

- Cereals, unprocessed;
- Drinks, non-alcoholic and alcoholic;
- Meat and poultry;
- Milling industry products; and
- Processed fish and seafood.

It should be noted that all of the above categories saw very rapid growth as imports grew from zero-base or near zero-base. This arose from some liberalisation measures, although in only one case, i.e. unprocessed cereals, did this lead to a large new market. Imported meat and poultry, milling industry products and processed fish/seafood remain small niches today.

India has the smallest and least diverse import market in Asia in 2006. More than 75% of imports involve vegetable oils, unprocessed cereals and vegetables, mainly dried products, e.g. pulses and lentils. India's imports of meat, fish, dairy products and other agrifoods and related processed products are minuscule, when compared to imports of these products into China or ASEAN.

Imports of processed food and drinks amount to less than 5% of imports. This situation exists because of significant regulatory barriers to such products, weak demand from Indian consumers and major challenges in India's highly fragmented and archaic distribution channels for processed food and drinks.

The realities of the demand situation for imported foods today are that:

- India is only importing to cover shortfalls in local supply; and
- Demand for imported brands currently comes from less than 1 million out of India's 1 billion or so citizens.

India (Population: 1.1 billion) actually has a smaller market for imported food than Malaysia (Population: 27 million) (see Table below). This situation has existed for many years.

<b>The Structure of India and Malaysia's Food Imports in 2002 and 2006</b>				
<b>Market segment</b>	<b>India</b>		<b>Malaysia</b>	
	<b>2002</b>	<b>2006</b>	<b>2002</b>	<b>2006</b>
	US\$ '000	US\$ '000	US\$ '000	US\$ '000
Meat and poultry	76	332	223,493	265,250
Fish and seafood	8,110	24,056	297,634	502,805
Dairy products, etc.	17,419	25,436	311,977	448,969
Vegetables	627,321	1,009,961	283,961	451,284
Fruits	387,494	824,240	124,620	144,508
Coffee, tea, spices	120,907	176,823	99,620	204,588
Cereals unprocessed	362	1,293,195	601,363	966,603
Milling industry products	4,013	14,437	87,829	123,305
Oilseeds, etc.	37,996	94,667	248,937	275,778
Fats and oils	1,861,888	2,263,483	328,178	724,866
Processed fish and meat	425	1,352	35,795	55,728
Sugar and its products	17,963	26,539	298,306	454,093
Cocoa and its products	14,496	29,792	173,550	731,352
Cereal/starch based preparations	23,892	26,544	186,503	307,275
Fruit and vegetable based preps	14,417	31,012	63,098	92,680
Miscellaneous food preparations	33,326	25,637	162,033	288,006
Drinks, non-alcoholic and alcoholic	20,668	111,370	91,886	185,401
<b>Total in US\$ '000</b>	<b>3,190,774</b>	<b>5,978,876</b>	<b>3,618,783</b>	<b>6,222,491</b>

Source: Official External Trade Statistics

Both countries have seen double digit growth in their imports of food products over the past 5 years. Malaysia is spending US\$ 230 per head per annum on imported food products. In comparison, India is only spending US\$ 5 per head per annum on such products.

Malaysia has a much broader base of imports than India and has strong demand for imported products in many of its market segments.

This situation exists because Malaysia has a more open market for imported products than India, has a more dynamic consumer market than India and has distribution channels that are modern and well organised. Malaysia is also an exporter of higher processed food and drinks that has strong demand for imported food ingredients.

Malaysia is also part of the strong “Core of ASEAN” market that also includes Singapore and Brunei. Close to 30% of Malaysia’s imports are processed food and drinks.

#### **4. Future strategic directions for Asia’s imported food markets**

All countries in the region are forecasting economic growth in 2008 and 2009 (see Table below).

<b>Asian Region Economic Growth Forecasts</b>			
<b>Country</b>	<b>2007 *</b> %	<b>2008 Range</b> %	<b>2009 Range</b> %
ASEAN			
□ Indonesia	6.3	5 to 6	5 to 6
□ Malaysia	6.1	5 to 6	5 to 6
□ Philippines	6.7	5 to 5.5	Around 5.5
□ Singapore	7.5	4 to 6	4 to 6
□ Thailand	4.3	Around 5	4.5 to 5.5
□ Vietnam	8.4	8 to 8.5	Around 8
China, People’s Republic	11.4	9.5 to 10	9 to 9.5
India	7.8	7 to 8	Around 7.5
*: Some data is actual and other provisional data or estimates Source: National government and economic analysts			

Thailand is reporting an improvement in its economic fortunes following on from the election of a new civilian government. The new Prime Minister is expected to implement an extensive economic stimulus package and to change some of the laws on foreign investment that were brought in by the Junta after the military coup.

All of the other countries in the region are forecasting lower growth than in 2007 and are taking measures to prepare for the possibility that a recession will occur in the USA and that a slowdown may affect other parts of the Developed World, i.e. the EU.

Most governments in the region are also concerned that inflation, which has been increasing all across the region, will have a negative impact on their economies. Singapore has just forecast the potential for its highest inflation in over 20 years. Inflation in China is rising, and it is already running at 6% and 8.5% in Indonesia and Vietnam respectively.

There is a general view that strong demand from China, in its Olympic Year, and, to some extent, India will help the region avoid a major negative “hit” from the evidently troubled U.S. economy.

Lee Kuan Yew, Singapore’s Minister Mentor, who steered Singapore through a number of U.S. inspired downturns and slowdowns in the past, has recently commented that it could be the first time that Asia survives a U.S. recession without having problems itself. If this happens it will arise because of strong demand from across the whole of Asia, China, India and ASEAN, in particular oil rich / palm oil rich countries such as Malaysia and Indonesia.

The forecasts being provided by governments and economic analysts indicate that strong demand for a wide range of imported foods will continue to exist in Asia over the next 3 year or so. This is very positive for exporters that have a full understanding about Asia’s market opportunities and demands.

Each market in the Asian region is different. The region as a whole is not one to make assumptions about. There is a very high level of speculation in India and China at the moment, as there was in ASEAN prior to the 1997/98 Asian economic crisis. Although India and China have booming economies, demand in both countries is very immature, underpinned by price sensitivity. Additionally, certain product ranges and products face inherent barriers either from local policy/regulation or local competition or both.

As in the past, we strongly advise that brand owners and their exporters do full and appropriate marketing due diligence on their target markets in Asia before they start to become active in them. This will reduce learning time and costs and lead to a better experience in developing viable trade with the region in future.

# **Stanton, Emms & Sia - Capability Statement**

## **Who we are**

Stanton, Emms & Sia (SES) is a specialist food and beverage market research and consultancy business. The firm is based in Singapore with research and consultancy resources in all South East Asian countries, China, Australia, New Zealand, Hong Kong, India, Japan, South Korea and Taiwan.

## **Our mission**

Our mission is to help our clients to build strong positions in their target markets by:

- Assisting them to develop a commercially focused and coherent "big picture" of their customers and markets, including the basis of competition and forces and barriers affecting the markets.
- Providing them with clear and concise insight into their markets, especially their customers wants and needs.
- Assisting them to:
  - ❑ Identify profitable opportunities in their target markets in the East Asian region.
  - ❑ Develop strategies to:
    - Fully exploit the opportunities that have been identified in their target markets; and
    - Minimise their threats and weaknesses in their target markets.
  - ❑ Successfully build a sustainable long-term presence for their brands or products in their target markets.

## **We specialise in servicing clients in the food, drink and agrifood industries**

SES focuses on the international industry and markets for food and beverages in Asia, our region. We offer our clients a full "food chain" consultancy service ranging from analysis of farm input usage to the strategic planning of business strategies in the international agricultural, food and drinks sector. Our experience covers the complete spectrum of food types from commodity to highly value added, generic to branded, fresh to processed.

SES maintains an on-going research programme, analysing and assessing key markets and underlying food, beverage and agribusiness issues that affect the Asia Pacific region now and in the future. Much of our work for clients is forward looking and interpretative. Our management team has been monitoring the region's food, beverage and agrifood markets since the late 1980s.

The real value delivered to our clients is in the interpretation of what the research is telling us. The lack of skilled synthesis, analysis and interpretation is often the aspect which undercuts good market research performed by our competitors who operate without having a tangible presence in our region. Having researchers who are based in the country and aware of the trends and tone of the market is therefore invaluable. We believe our team has this proven track record.

## What we offer

Our services to clients include:

- ❑ Business and marketing consultancy.
- ❑ Brainstorming, analysis and interpretation.
- ❑ Brand research.
- ❑ Business to business research.
- ❑ Consumer research.
- ❑ Cultural analysis in the food and drinks markets.
- ❑ Data collection in the field.
- ❑ Depth interviews.
- ❑ Desk research.
- ❑ E-mail interviews.
- ❑ Evaluations of marketing programs.
- ❑ Evaluations of advertising and promotional activities.
- ❑ Executive interviews.
- ❑ Face to face interviews.
- ❑ Fax-back interviews.
- ❑ Focus groups and other discussion groups.
- ❑ Hall tests.
- ❑ Industrial interviews.
- ❑ International research.
- ❑ Interactive research, including research workshops.
- ❑ Intercept interviews of consumers.
- ❑ Market observations.
- ❑ New product development support research.
- ❑ Strategic planning support research and brainstorming.
- ❑ Panels, ad-hoc research, including sensitivity panels.
- ❑ Positioning research.
- ❑ Postal surveys.
- ❑ Product testing.
- ❑ Qualitative research.
- ❑ Questionnaire design.
- ❑ Report writing and presentation development.
- ❑ Surveys, consumer and industrial.
- ❑ Syndicated research, including multi-client studies and surveys.
- ❑ Tactical research.
- ❑ Telephone interviews.

## Our multi-client report program

We actively produce a number of multi-client studies each year as part of this research work. As a result, we regularly interview food manufacturers and processors, food importers and wholesalers as well as key decision-makers in some of the main retail groups. SES' advantage is that our research consultants actually know and understand how the local food industry actually operates and thinks.

Past multi-client studies have included:

- Beyond the Asian Economic Crisis: Marketing Processed Foods Under New Food Supply Chain and Distribution Scenarios in Developing East Asia.
- The Food Chain in South East Asia: Strategic Directions & Opportunities for Food Businesses.
- Our *Asian Dairy Series* of reports, which includes forward looking opportunity identification studies on the markets in Indonesia, Malaysia, Singapore, South Korea and Vietnam.
- Beer in Developing East Asia and China: Strategic Directions & Opportunities for Brewers.

## Our clients

We undertake assignments for a wide range of clients, drawn from both the public and private sectors. Our client base includes some of the world's largest food, drink and agrifood businesses and includes the following entities:

- Multinational companies located in Asia, Australia, Europe and North America.
- Large national companies from Australia, UK, USA, South Africa, Japan and the Philippines.

- Smaller companies based in countries such as Australia, Malaysia and Singapore.
- Governments, government organisations and embassies of European and North American countries and Australia located in Asia and their home countries.
- Other entities, including co-operatives and societies, operating in Australia, Netherlands, Denmark, the USA and France.
- Food and agricultural research organisations located in Australia and the UK.

### **Contacting us**

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