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The Southeast Asia Food Manufacturing Industry

Overview

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This report has been prepared to alert U.S. food ingredient supplier to U.S. export opportunities within Southeast Asia.

Next year, March 30-April 1, 1999, a Food Ingredient Asia show will be held in Singapore. This show will draw food producers and manufacturers, purchasers, government, trade associations, ingredient distributors, R&D, and marketing personnel from throughout Asia. The show organizer, Miller Freeman, projects about 80 percent of the expected 5,300 visitors will come from the Southeast Asia region. The balance will come from China, India, Japan, Korea, Taiwan, and Europe. The 1998 show was held in Shanghai, China; this year its Singapore's turn again.

The Economist, in its special issue "The World in 1998," defined the current crisis in Southeast Asia as good, since it will force changes for more modern management and more efficient production techniques. The following report is intended to, in part, provide information on the changes taking place.

This report identifies major food manufactures within Southeast Asia.

The Southeast Asian Food Manufacturing Industry in Overview

An Executive Briefing for
US Suppliers of
Food Ingredients, Additives and Other Chemicals
Used by Food and Beverage Manufacturers

This executive briefing was prepared by Stanton, Emms & Sia, 391A Orchard Road, Ngee Ann City Tower A, Singapore 238873 for the US Department of Agriculture Trade Office, Foreign Agricultural Service, American Embassy, Singapore under Purchase Order Number SSN10098M0608.

October 29, 1998

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Foreign Exchange Rates Used in Translating Local Currencies to US$	
	Local Currency to US$
Brunei (Dollar)	1.65
Cambodia (Riel)	4,015.00
Indonesia (Rupiah)	9,075.00
Laos (Kip)	2,602.00
Malaysia (Ringgit)	3.80
Myanmar/Burma (Kyat)	6.09
Philippines (Peso)	43.23
Singapore (Dollar)	1.65
Thailand (Baht)	38.53
Vietnam (Dong)	13,904.00
Source: Bank of America Global Trading, London (October 9, 1998)	

Introduction

This executive briefing has been prepared for the US Agricultural Trade Office in Singapore by Stanton, Emms & Sia. It has been prepared to provide US exporters of food ingredients, additives and chemicals with an overview of:

- Southeast Asia's food manufacturing industry and its products.
- The region's market for food ingredients, additives and other chemicals used by food manufacturers.
- The region's regulatory environment for such products.
- Material procurement and sourcing characteristics in the region.
- Future prospects for US exporters to the region.

The executive briefing covers 10 countries, namely Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand and Vietnam. It is supported by desk research, limited market and industry observations and a limited number of interviews with trade and other relevant respondents. Some World Health Organisation offices in the region assisted by providing additional insight into the region's food laws.

The study concentrated on profiling the region's higher processed food sectors. For this reason, sectors which process local agricultural products are not covered in any detail. Two broad categories of products used by food manufacturers are considered:

- Food used as ingredients.

  These products include meat products, fish and seafood, dairy products, vegetable and vegetable products, fruit and fruit products, herbs and spices (not chemical flavours), cereals and cereal products, pulses and pulse products, fats and oils, cocoa and its products, sugars and sugar derivatives and starch and starch derivatives.

- Food additives and other chemicals.

  These products include colours, emulsifiers, enzymes, essential oils and plant extracts, flavours and aromas, hydrocolloids and gelling systems, sweeteners and yeast and yeast derivatives used in food production and other chemicals used by food manufacturers.

Executive summary

The region in profile

Southeast Asia is a region of close to 500 million people. About 33% of the population are aged 15 years and younger which represents significant potential for future development of the region's market for processed food and beverages.

The region's middle to upper income groups amount to about 65 million persons today, which represents the bulk of the market for higher processed foods and beverages. A further 150 million reside in a low income society while the balance live in agricultural societies. The persons living in these two societies include consumers who also consume small quantities of higher processed food and beverages.

ASEAN initiatives affecting the food industry development

Politically, the region comprises Brunei, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand and Vietnam, all member states of the Association of South East Asian Nations (ASEAN), and Cambodia, which is likely to join ASEAN once its current political problems have been resolved.

The major force for change on the industry in Southeast Asia is the development of an ASEAN Free Trade Area (AFTA) which offers tariff reductions, with average tariffs of between 0% and 5% by 2003 for the major ASEAN economies, and the elimination of non-tariff barriers for manufactured and agricultural goods originating from ASEAN countries.

Other initiatives which may have a positive impact on the future structure of the food manufacturing industry include the ASEAN Industrial Co-operation Agreement (AICO) which promotes intra-ASEAN collaboration over production, distribution and marketing of ASEAN manufactured products and the ASEAN Investment Area (AIA), still at the drafting stage. The AIA is expected to be structured to allow investors to take benefit from an ASEAN-wide investment strategy.

The region's food manufacturing industry

Singapore, Malaysia, the Philippines, Thailand and Indonesia have the most sophisticated food and beverage manufacturing industries. Together, they generate an estimated US$ 31 billion of sales per annum.

Those operating in Vietnam, Laos, Cambodia and Myanmar generally operate at a more basic level. Brunei has a very small locally oriented industry.

The region's food industry produces a diverse range of products ranging from traditional foods through to modern frozen prepared foods such as TV dinners.

Regulatory environment and distribution

The regulatory environment over food ingredients, additives and other chemicals used by food manufacturers is complex. Exporters need to consider this aspect of their business on a country by country basis and not from a regional standpoint.

The bulk of supplies of food ingredients, additives and other chemicals used by food manufacturers pass through localised distribution channels supported by local importers. Large companies in some sectors, e.g. flour milling, brewing and dairy processing, import their bulk ingredients direct from overseas suppliers.

Singapore is a key re-export base for additives and chemicals with over 60% of its imports being re-exported. Suppliers in Bangkok, Thailand and Hong Kong are also re-exporting smaller quantities to some parts of the region.

The regional crisis and its impact

The region is currently affected by an economic downturn which has resulted in recessions in some countries, particularly Thailand and Indonesia which are also beset by major problems in their banking and finance sectors. Most economic commentators foresee the region returning to economic growth of between 3% to 6% per annum in 3 to 5 years' time.

Despite the economic downturn and its effects on the consumer markets, some multinationals such as Nestlé, Unilever and Groupe Danone (France) are taking a long term view of business development which has included new investments and product launches in the region over the past 18 months.

The market for food ingredients, additives and chemicals

The estimated value of the market for imported foods used by food manufacturers is around US$ 7.9 billion. In addition to this, the market for imported additives and other chemicals used by food manufacturers is estimated to be valued in excess of US$ 1.6 billion.

A wide range of food manufacturing businesses use imported food ingredients, additives and other chemicals. The key customers in the region are those which lead their markets or are involved in exports which are to an extent insulated from the economic downturn. Demand varies from country to country because of the different strengths, weaknesses, opportunities and threats which exist for local food manufacturers.

Future opportunities for US exporters

Opportunities exist for US exporters in all Southeast Asian countries. The key sectors on a regional basis are dairy processing, wheat flour milling, noodle manufacturing, baked product manufacturing, brewing, soybean products and soft drinks. Other sectors producing edible oil, processed fish and seafood, canned vegetables, processed meats and snack foods exhibit more localised opportunities because of varying levels of demand for such products and differences in sophistication in each local food industry.

The key markets for imported food ingredients are found in Indonesia, the Philippines, Malaysia and Singapore. Thailand's market is more limited because of a concentration on using local products.

The market for food additives and other chemicals used by food manufacturers is regional, although serviced by local suppliers. Singapore is an important re-export base for such products.

1. Southeast Asia in profile

Southeast Asia has a total population of about 497 million persons. It encompasses 10 diverse countries, ranging in size from the diminutive oil rich sultanate of Brunei to the Indonesia, East Asia's second most populous country. The Table below provides a profile of the region today.

Southeast Asia Economic Profile			
Country	**Population in Millions**	**GDP Per-Capita in US$**	**Economic Status**
Brunei	0.3	20,400	Oil industry.
Cambodia	10.3	270	Agricultural.
Indonesia	202.0	981	Mixed with agricultural bias.
Laos	5.0	370	Agricultural.
Malaysia	20.7	4,287	Mixed with manufacturing bias.
Myanmar	48.3	765	Agricultural.
Philippines	70.0	1,203	Mixed with agricultural bias.
Singapore	3.1	31,900	Manufacturing and finance.
Thailand	60.6	2,450	Manufacturing and agriculture.
Vietnam	76.9	280	Mainly agricultural.
Source: ADB, IMF and National Governments			

The vast diversity in economic standing underpins the size and nature of the region's consumer markets. The Table below provides an overview of the region's income/wealth profile today.

Regional Income/Wealth Profile		
Income groups	**Population in Millions**	**Location of Groups**
High incomes	15	Singapore, Brunei, Manila, Bangkok, Jakarta and other cities.
Middle incomes	50	Cities and towns in all countries.
Low incomes	150	Cities, towns and some affluent rural areas in all countries.
Rural incomes	282	All agricultural countries in the region.
Total	497	
Source: ADB and National Governments (Based on purchasing power parity data)		

Southeast Asia is unusual in that it has a high proportion of young population compared to the western developed world which has a rapidly ageing population. The Table below provides the age profile of the population in Southeast Asia.

Southeast Asia's Age Profile				
Country	**Percentage Aged**			
	0 - 14 Years	**15 - 60 Years**	**60+ Years**	**65+ Years**
Brunei	32	60	5	3
Cambodia	43	49	5	3
Indonesia	31	57	7	5
Laos	45	47	5	3
Malaysia	36	54	6	4
Myanmar	35	54	7	4
Philippines	37	53	6	4
Singapore	23	60	10	7
Thailand	26	60	9	5
Vietnam	35	53	7	5
Southeast Asia	**33**	**55**	**7**	**5**
Source : Population Data, 1998, UNDP				

The Table above highlights that a large proportion of the population is young, with children less than 15 years old forming 33% of the total population. According to the United Nations, most of the developed world has a significantly lower percentage of persons under the age of 15 years, i.e. 18.8%.

Southeast Asia therefore has a large number of future consumers in today's young population. While not all of these will be wealthy enough to participate in tomorrow's real consumers' market, trade sources comment that this section of society will be an important driver of processed food and beverage consumption in the future.

2. The food manufacturing industry

2.1 The industry structure today

Southeast Asia's food manufacturing industry does not have a significant regional orientation. However, investments made since 1990 have increased the number of businesses with a regional marketing outlook. A large proportion of the processed foods and beverages consumed in the region are locally manufactured and branded. The national industries are structured as follows:

! A very large number of small to medium sized businesses. Most of these are family businesses involved in the production of traditional foods and some non-indigenous foods, e.g. biscuits, ice cream and daily baked products, which are long established in the market.

! A small number of large local businesses. Most of these are listed on their local stock exchange and are involved in the production of traditional foods and popular non-indigenous foods derived from imported ingredients, e.g. dairy products, wheat based products, soft drinks and candies. Exports of processed or semi-processed local agricultural products are often an important source of income for these businesses.

! A very small number of multinational businesses, e.g. Nestlé, Coca-Cola, Pepsico, CPC/AJI, Heineken, Carlsberg, Groupe Danone, Campbell Soups and Novatis Nutrition. Some of these businesses are listed on the local stock exchange, are joint ventures with large local businesses or, in the case of a small number, are wholly owned subsidiaries of their parent company. These businesses are usually market leaders in their respective fields and very often operate in a manner similar to that of the large local businesses.

Longstanding barriers to imports have allowed local industries to develop and dominate each country's home market. While the past 5 to 8 years have seen a reduction in trade barriers and an increase in trade between the countries of the region, the strength of local producers and their products continue to provide competitive challenges to new brands from neighbouring countries.

2.2 The products manufactured in Southeast Asia

The following products are manufactured throughout Southeast Asia today. Most contain a relatively high proportion of imported ingredients because of a lack of appropriate local substitutes. Producers range from small to large businesses.

! Processed foods:

< Canned Asian foods based on meat and poultry, e.g. curries and local stew-type products.
< Canned fish/seafood products in tomato sauce, edible oil and localised sauces.
< Canned milks, powdered and liquid.
< Ice cream, including local flavours.
< Yogurt, cupped and drinking types.
< Cheese, mainly processed.
< Dairy based infant formula and foods.
< Canned vegetables, including Asian vegetables.
< Coffee creamer.
< Canned fruits, including local fruits.
< Coffee and tea, including powdered, mixed and flavoured products.
< Sugar confectionery.
< Chocolate confectionery and beverage powder.
< Noodles, spaghetti and macaroni.
< Biscuits, cakes and daily baked items.
< Cereal based infant foods and breakfast cereals.
< Snacks based on cereals and potatoes.
< Jams/jellies.
< Prepared nuts.
< Sauces, particularly soy sauce, tomato sauce, fish sauce and chilli sauce.
< Soups, including Asian soups.
< Chicken extracts.
< Edible oils and margarine.
< Indigenous foods in instant forms, e.g. noodles and congee.
< Supplies to the food service sector, e.g. meat, poultry, sauces and baked products.
< Frozen cooked foods, including ready-to-eat TV dinners, based on Asian and foreign recipes.
< Processed meats. e.g. sausages, hot dogs, ham, bacon and cold cuts.

! Beverages:

< Dairy beverages.
< Beer.
< Carbonated soft drinks.
< Fruit beverages and juices.

< Cordials.

- Local beverages based on soybean, tea, herbs and other local agricultural products.
- Other products such as health drinks, sports drinks and energy drinks.

It should be noted that:

- Some local ingredients are being used to substitute imports in some of the above products. Major examples include local palm oil in dairy products, cassava flour (Tapioca) in baked products and rice and/or cassava in beer.

- Businesses involved in the manufacture of sausages, ham, frozen foods with local flavours and forms, e.g. cooked chicken wings, meat patties, processed fish and seafood items, yoghurt and spaghetti and other pasta, are generally serving urban niche markets. These products are not mainstream items in the local diets.

- Some local manufacturers specifically target hotels and high end food service businesses with their products.

Alcoholic beverage production is controlled in most countries and is affected by religious sentiment in others. Brewing is a large business, even in Indonesia and Malaysia, where the majority of the population is Muslim. Brunei is the only country which does not permit the manufacture and commercial sale of alcoholic beverages within its territory.

2.3 The level of industry sophistication in the region

Industry sophistication in Southeast Asia generally matches the sophistication of the consumer base. For this reason, Singapore, Malaysia and the Philippines have the most sophisticated industries with Laos and Cambodia, the least sophisticated (see Table below).

Level of Industry Sophistication in Southeast Asia				
	Multinational Activity	**Local Businesses**		
		Commodity Oriented with Basic Products	**Market Driven with Branded Products**	**R&D Activity, including Training**
Brunei	Brunei has a very small highly localised food processing industry			
Cambodia	Only in Beer	Most producers	Local brewer	None known
Indonesia	Extensive	SME's	Large locals	Limited
Laos	None known	Most producers	Local brewer	None known
Malaysia	Extensive	SME's	Large locals	Widespread
Myanmar	Beverages	Most producers	Local brewer	None known
Philippines	Extensive	Most SME's	Large locals	Limited
Singapore	Key R&D Base	Most SME's	Large locals	Extensive
Thailand	Extensive	SME's	Large locals	Widespread
Vietnam	Limited	Most producers	Beverage	Very limited

SME's: Small and medium sized businesses
Source: Industry observations by Stanton, Emms & Sia (1996 to 1998)

The following matters should be noted when considering the information provided in the above Table:

! Countries which have multinational investment in their food and beverage manufacturing sectors generally have more dynamic local industries. In Singapore, the Philippines and Malaysia, local businesses often develop products to compete with those of the multinationals and also benchmark the marketing activities of the multinationals. R&D activities are also undertaken by local food processing businesses in Indonesia, Philippines, Thailand and, to a lesser extent, Vietnam.

! Most of the food and beverage manufacturers in the less developed countries in the region, i.e. Myanmar, Laos, Cambodia and Vietnam generally do not engage in R&D activities. Vietnam and, to a lesser extent, Myanmar have received low levels of foreign investments into their food and beverage manufacturing sectors. The main sectors receiving investment are:

< Beer.
< Carbonated soft drinks.
< Dairy products.

Myanmar is subject to extensive trade and investment sanctions from the Developed World. Consequently, its main source of investment is Southeast Asia and other Asian countries.

! Singapore has only limited multinational involvement in its food and beverage manufacturing sector. It is a production base for some of the world's main ingredient businesses, e.g. Bush Boake Allen and McCormick. In addition to this, Coca-Cola, Heineken (through Asia Pacific Breweries of Singapore), Kikkoman (Japan) and Pokka (Japan) have investments in food and beverage plants in Singapore.

! Other multinational businesses use Singapore as a regional service base. For example:

< One of Nestlé's R&D centres is based in Singapore.

< Unilever, Tysons Food and Delifrance have regional headquarters in Singapore.

< Cargill obtained "Approved International Trading" status from the government to operate an international trading business from Singapore.

The main customers for imported food ingredients and additives are generally the large local businesses and multinationals. Companies involved in R&D are key users of sophisticated ingredients and additives. Small and medium sized businesses usually have less sophisticated demand traits and their products normally incorporate a more basic range of ingredients.

2.4 ASEAN initiatives affecting food industry development

ASEAN, the Association of South East Asian Nations, was formed in 1967. Its current members are Brunei, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand and Vietnam. Cambodia is likely to be admitted as a member once its internal political turmoil has subsided.

ASEAN has seen a history of government sponsored industrial co-operation in the region marred by disputes between governments. Three key industrial co-operation schemes have been introduced and superseded since the 1970's. Trade sources comment that these schemes were largely unsuccessful in attracting regionally oriented investment because they were bureaucratic and inflexible. As a result, many companies now have operations in each ASEAN country which were established to avoid the barriers which existed to intra-ASEAN trade.

Today, ASEAN has two different schemes and agreements which may affect the future structure and strategic direction of the food manufacturing industry. These include:

! The ASEAN Free Trade Area (AFTA), which is now in its sixth year of implementation, offers tariff reductions and the elimination of non-tariff barriers for manufactured and agricultural goods originating from ASEAN member states.

Full implementation of AFTA, with average tariffs of between 0% and 5%, is planned by 2008. Brunei, Indonesia, Malaysia, Philippines, Singapore and Thailand have undertaken to comply with the main goals of AFTA by 2003. Vietnam has undertaken to comply with the goals by 2006 and Laos and Myanmar by 2008.

According to a press release from the ASEAN Secretary General in mid-October 1998, about 84% of all tariff lines are now covered by the AFTA CEPT (Common Effective Preferential Tariff) scheme. This amounts to about 46,000 items on which tariff rates for trade within ASEAN have now fallen to an average of around 5.4%. Products which fall outside of the 46,000 items are mainly unprocessed products/agricultural raw materials produced in ASEAN for which member states have sought protection because of the undeveloped nature of the producing industries.

Officially, "ASEAN content" for the purposes of qualifying for lower tariffs under the AFTA CEPT scheme is achieved by manufactured products only "if at least 40% of its content originates from any ASEAN member state".

The average tariff rate is expected to fall to less than 4% by the year 2000. Most higher processed foods manufactured within ASEAN are now covered by the AFTA scheme.

! The ASEAN Industrial Co-operation Agreement (AICO) which became operational in November 1996.

The AICO establishes the foundation for co-operative arrangements between a minimum of two participating companies from two different ASEAN countries. It offers the AICO approved participating companies:

< Tariff privileges under which they may receive approval to trade at preferential duty rates of between 0% and 5%.

< Official local content accreditation and, in some cases, other non-tariff incentives available from the ASEAN member nations which are involved in the AICO arrangement.

The AICO has been developed to allow companies operating in ASEAN the opportunity to collaborate with one another to enhance their production, distribution and marketing economies of scale.

In addition to AFTA and AICO, the member states of ASEAN are currently formulating another arrangement known as the ASEAN Investment Area (AIA). When launched in 1999 or the year 2000, the AIA is expected to allow investors to take a more flexible ASEAN-wide view of their investment strategy. It should benefit businesses investing in a regional network of factories and operations and wishing to accrue new economies of scale on a regional basis.

Trade sources now consider that the main future stimulus for industrial development will be private sector investments ahead of the full implementation of the AFTA. Change is, in fact, already evident. A number of key foreign businesses have increased their investments in ASEAN or entered the region as an investor for the first time:

- Nestlé was one of the few businesses to invest under the now defunct ASEAN Joint Venture Investment Scheme (AIJV). As a result, Nestlé's AIJV businesses now enjoy low tariff entry throughout ASEAN for soysauce powder produced in Singapore, breakfast cereals (from Philippines), non-dairy coffee creamer (from Thailand), sugar confectionery (from Indonesia) and chocolate products (from Malaysia).

- Groupe Danone of France is producing biscuits in Indonesia and Malaysia for export to other parts of ASEAN.

- Kellogg's is producing breakfast cereals in Thailand for export to other parts of ASEAN.

- Kraft is attempting to gain low tariff access for its Indonesian cheese to Thailand. This is being done as part of an agreement which should see its Sugus sugar confectionery brands manufactured in Thailand for ASEAN-wide distribution.

Other businesses, including Campbell Soups and Pepsico Foods, have also invested in ASEAN to benefit from improved future low tariff access to the ASEAN regional markets.

3. Industry overviews

3.1 Thailand

Thailand's food and beverage processing industry comprises close to 24,000 businesses. About 22,000 of these businesses are small family businesses with the balance comprising medium to large sized limited companies, partnerships, government entities and co-operatives. Total industry sales are estimated at more than US$ 11 billion.

The industry is dominated by companies which process local primary products such as poultry, pork, fish, seafood, fruits, vegetables and rice. The main outputs of the industry are fresh, dried, frozen or canned products destined mainly for the export markets. Rice whiskey production is also a major activity, focused on meeting local demand.

A limited number of businesses are involved in manufacturing higher processed foods and beverages. The total sales of this section of the industry are estimated at US$ 6.2 billion, inclusive of the large sector involved in producing canned and frozen fish, seafood, fruit and vegetables. The Table below provides an overview of the key areas of Thailand's food and beverage processing industry as well as identifying some of the key players involved in the industry today.

Sector	Annual Sales in US$ Millions	Major Businesses
Higher processed meat and poultry	190	Chareon Pokphand Group Better Foods Laemthong Protein Foods Bangkok Ham S. Khon Kaen Food Industries
Canned and frozen fish and seafood	1,750	Thai Union Surapon Seafoods Songkla Canning ISA Pataya Food Industries Sea Horse
Canned, frozen and other processed fruits and vegetables	450	Malee Sampran Factory Dole Thailand Sun Tech Group Thai Agri Foods CPC-AJI (Thailand)

Sector	Annual Sales in US$ Millions	Major Businesses

Dairy processing, including dairy beverages and ice cream	650	Nestlé Group Foremost Friesland Group Thai Dairy Industry Dutch Mill Co. Dumex CP -Meiji
Baked products, noodles, snacks and breakfast cereals	350	Thai President Foods United Foods Friendship Co. Thai Glico President Bakery President Rice Products Namchow (Thailand) UFM Food Centre Food Processing Co. Kellogg's Thailand Thai Sanwa Food Industrial Useful Food Co. Siam Snack (Pepsico Foods)
Sugar and chocolate confectionery	80	Adams (Thailand)
Other processed foods, including sauces and seasonings, instant coffee, coffee creamer, chicken extracts and frozen prepared foods.	730	Nestlé Group. Ajinomoto Co.(Thailand) Novatis (Thailand) Cerebos (Thailand) Thai QP
Beer	995	Boonrawd Brewery Co. Carlsberg Brewery (Thailand) Kloster (Thailand)

Sector	Annual Sales in US$ Millions	Major Businesses
Non-alcoholic beverages	1,050	Serm Suk Public Co. Ltd (Pepsi) Thai Pure Drinks Ltd (Coca-Cola). Osotpa Co. Green Spot (Thailand) Haad Thip
Source: Company accounts, market observations and National Statistical Office, Royal Thai Government		

It should be noted that Nestlé has a number of companies in Thailand. These companies are involved in a number of market segments, including dairy products, infant foods, instant coffee, coffee creamer, Milo drink powder, sauces and seasonings and distribution of processed foods.

Only limited information is readily available on the industry's production output. The Table below provides the data which is readily available from official and trade sources.

Thai Processed Food Output	
	Tonnes
Beer ('000 Litres)	874,231
Soft drinks ('000 Litres)	1,956,000
Traditional liquor ('000 Litres)	916,260
Ready-to-drink milk ('000 Litres)	710,818
Ice cream	30,000
Soy sauce ('000 Litres)	577,000
Non-dairy creamer	35,000
Source: Bank of Thailand and trade sources	

3.2 Malaysia

Malaysia's food and beverage processing industry comprises more than 3,500 businesses, ranging from small family businesses to large businesses which are listed on the Kuala Lumpur Stock Exchange or operate as subsidiaries of foreign or multinational businesses. Of these businesses, medium to large scale businesses number between 1,300 to 1,400 firms in 1996.

Total output for the industry was about US$ 8.8 billion in 1996. The Table below provides an overview of the industry based on a survey of medium to large sized firms and highlights the names of some of the key businesses operating in Malaysia today.

Processing Sector	Number of Businesses	Output Value in US$ Millions	Key Companies
Processed meat and poultry	18	146.8	Mac Food Service Sdn Bhd (McDonald's) Cold Storage Malaysia Solid Side Food Industries. Amoy Canning Sdn Bhd Yeo Hiap Seng (Malaysia) Bhd Prima Agri-Products Sdn Bhd

Processing Sector	Number of Businesses	Output Value in US$ Millions	Key Companies
Fish and seafood	57	217.8	A Clouet & Co (KL) Sdn Bhd Ace Canning Corp. Sdn Bhd Gan United Cannery Sdn Bhd Numerous companies operate in the frozen fish and seafood sector.
Dairy products, including ice cream	32	335.4	Nestlé (Malaysia) Dumex Dutch Baby Milk Industries F&N Dairies Unilever - Wall's Ice Cream Division Rasamawa Ice Cream Manufacterer King's Creameries
Canned fruit and vegetables	81	95.1	Campbell Soups in Malaysia A. Clouet & Co (KL) Sdn Bhd Ace Canning Corp. Sdn Bhd Yeo Hiap Seng (Malaysia) Bhd Rex Canning Co. Sdn Bhd
Refined sugar	7	302.8	Central Sugars Refinery Sdn Bhd Gula Padang Terap Bhd Malayan Sugar Manufacturing Co Bhd
Flour milling	9	185.1	Federal Flour Mills Berhad Malayan Flour Mills Bhd
Noodles, instant and traditional	136	120.8	Nestlé (Maggi) Mamee Double Decker Yeo Hiap Seng (Malaysia) Bhd Vit Makanan (KL) Sdn Bhd

Processing Sector	Number of Businesses	Output Value in US$ Millions	Key Companies
Biscuits	67	199.6	Brittania Brands (Group Danone) Perfect Food Industries Hwa Tai Food Industries Berhad Khong Guan Malaysia
Chocolates and sugar confectionery	44	232.0	Cadbury Confectionery Chocolate Products (Malaysia) Bhd Upali (M) Sdn Bhd Nestlé ASEAN (Malaysia) Sdn Bhd
Edible oils and margarine	170	5,922	Lam Soon (M) Bhd Unilever (Malaysia) Yee Lee Corporation Bhd

Processing Sector	Number of Businesses	Output Value in US$ Millions	Key Companies
Other products, e.g. sauces, seasonings, soup, spreads, coffee, tea and traditional foodstuffs	+ 300	228.3	CPC-AJI Malaysia Nestlé (Malaysia) Campbell Soups in Malaysia Ace Canning Corp. Sdn Bhd Dewina Food Industries Sdn Bhd Keebler Co (M) Sdn Bhd Numerous companies operate in the sauce sector.
Alcoholic beverages, including beer	2 main breweries	118.9	Guinness Anchor Bhd Carlsberg Brewery Malaysia Bhd
Carbonated soft drinks	42 (including non-carbonated drinks)	226.6	Fraser & Neave (Coca-Cola) Permanis (Pepsi-Cola) Yeo Hiap Seng (Sarawak Pepsi-Cola) East Coast Bottling Sdn Bhd
Non-carbonated soft drinks	See above	See above	Yeo Hiap Seng (Malaysia) Bhd Fraser & Neave (Malaya) Sdn Bhd Ace Canning Corp. Sdn Bhd

It should be noted that a number of companies operate in a range of sectors. These businesses are larger businesses which dominate the markets in which they operate. These businesses include Nestlé, CPC-AJI, Unilever, Fraser & Neave, Yeo Hiap Seng, Mamee Double Decker, Lam Soon/Ace Canning Corporation and the two breweries. Groupe Danone (France) is another business which is expanding its business from a strong position in the biscuit market.

Malaysia also has a sizeable bakery sector producing daily baked breads, buns and pastries. According to government statistics, more than 250 such bakeries exist across the country. The total value of output of this sector was US$ 150.4 million in 1996.

The Table below provides some recent data on the food and beverage industry output.

Processed Food and Beverage Production Output in 1997	
	Tonnes
Frozen prawns	15,119
Canned fish	19,479
Canned sweetened condensed milk	174,673
Infant milk	16,545
Full cream milk powder	41,347
Milk beverages ('000 Litres)	77,228
Canned pineapple	31,114
Wheat flour	720,240
Noodles, wheat and rice (1995)	225,000
Traditional soybean foodstuffs (1995)	40,000
Blended cooking oil	86,637
Margarine	26,572
Biscuit	107,017
Refined sugar	1,155,320
Carbonated soft drinks ('000 Litres)	339,547
Non-carbonated soft drinks ('000 Litres)	173,800
Beer (FAO data)	97,000
Source: Department of Statistics, Malaysia (Published August 98)	

The industry has a broader base than many of Southeast Asia's food and beverage processing industries because the relatively low duties on most processed food and beverages has stimulated the introduction of new foods to local production to compete with imports. Malaysia's more open trading environment has also stimulated the use of imported ingredients by its local industry.

3.2 Philippines

The Philippines' food and beverage industry comprises more than 2,700 firms, most of which are small businesses. The industry's total sales revenue exceeds US$ 6.0 billion. It employs more than 175,000 persons in activities which process both locally produced and imported food ingredients.

The Table below provides an overview of the industry based on a survey of medium and large size businesses and highlights the names of some of the key businesses operating in the Philippines today.

Processing sector	**Number of Firms**	**Value of Gross Revenues in US$ Millions**	**Key Businesses**
Meat and poultry processing	15	656.9	Pure Foods Universal Robina Swift Foods RFM Corp. San Miguel Group
Dairy products, including fluid milk	38	213.2	Alaska Milk Corp. Kraft Foods (Phils) Inc. Philippine Dairy Products Corp. Selecta Dairy Products Inc. Yakult Philippines Inc.
Processed fruit and vegetables	86	154.9	Del Monte Philippines Inc Hunt Universal Robina Corp.
Processed fish and seafood	104	218.9	Century Canning Corp. Shamberg Marketing Corp. Nautica Canning Corp.
Edible oil and margarine	43	365.8	Legaspi Oil Co. Inc. Cargill Phils Inc. Granexport Manufacturing Corp.

Processing sector	Number of Firms	Value of Gross Revenues in US$ Millions	Key Businesses
Flour milling	12	300.5	General Milling Corp. Pilmico Foods Corp. Liberty Flour Mills
Cakes and pastries	26	89.9	Goldilocks Bakeshop Inc Golden Donuts Inc.
Biscuits	9	98.7	Monde Denmark Nissin Biscuit M.Y. San Biscuits Inc.
Noodles	5	98.3	California Manufacturing Co
Snacks	7	7.8	-
Chocolate and its products	5	43.1	Serg's Products Inc. Goya Inc.
Sugar confectionery	79	61.4	Wrigley Phils Inc. Storck Products Inc. Van Melle (Phils) Inc.
Other foods including mixed processing activities	96	1,018.4	Nestlé group companies Novartis Nutrition Phils Inc CFC Corp. Commonwealth Foods. Pepsico Foods (Philippines) McCormick Phils Lotte Philippines
Beer	2 main brewers	995.3	San Miguel Corp. Asia Brewery
Soft drinks	42	710.7	Coca-Cola Bottlers. Pepsi-Cola Bottlers. Cosmos Bottling Corp.
Source: National Statistics Office & Philippines Top 7000 Corporations 1997/98			

The Philippines' food and beverage market is dominated by large businesses which produce brands and products which are well known to local consumers. Nestlé, San Miguel Corporation, Pure Foods Corporation, RFM Corporation, California Manufacturing Co. Inc. (part of CPC-Ajinomoto Asian region's joint venture), Kraft Foods (Philippines) Inc, General Milling Corporation and Universal Robina Corporation have diversified product portfolios.

The Philippines' smaller food businesses are mainly involved in the production of traditional foods, sugar confectionery, traditional beverages and daily baked products.

The industry's product portfolio reflects the significant difference which exists between the westernised Philippines diet and the more traditional diets of its neighbours in Southeast Asia. Today, Philippines' food and beverage companies manufacture products for local consumption which are similar to those which can be found in a US supermarket.

Only limited published information is available on production output. The Table below provides the key data which is readily available.

Philippines Processed Food and Beverage Output	
	Tonnes
Beer	1,300,000
Processed coffee	121,000
Refined sugar	1,633,000
Vegetable oils	1,223,000
Source: FAO	

3.4 Indonesia

Indonesia's food and beverage industry comprises about 3,300 medium to large sized businesses and several thousand small businesses. Total output was valued at about US$ 3.1 billion in 1995, the date of the last government survey. The survey, which was based on a sample of about 2,200 businesses, highlighted the industry structure detailed in the Table below.

Sector	Value of Output in US$ Millions	Number of Businesses	Key Businesses
Meat processing, including canned products, not slaughtering	7.0	20	PT Aneka Bina Cipta Food Industry PT Canning Indonesian Products Salim group companies
Dairy processing, including dairy beverages and infant foods	149.2	21	PT Foremost Indonesia PT Friesche Vlag Indonesia PT Indomilk PT Nestlé Indonesia PT Yakult Indonesia PT Sari Husada PT Nutricia Indonesia Sejahtera
Ice cream	26.9	11	PT Unilever Indonesia PT Diamond Cold Storage PT Dolphin Super Ice Cream
Processed fruit and vegetables, including sauces, jam and purees	5.4	29	PT Aneka Bina Cipta Food Industry PT Indofood Sukses Makmur
Chocolate and sugar confectionery	39.6	98	PT Ceres PT Cipta Rasa Primatama PT Indo Cocoa Specialities. PT Mayora Indah PT Super World Wide Foodstuffs Industries PT Trebor Indonesia PT Konimex

Sector	Value of Output in US$ Millions	Number of Businesses	Key Businesses
Processed coffee	31.3	57	PT Indofood Jaya Raya PT Torabika Eka Semesta
Wheat flour	87.4	5	PT Bogasari Flour Mills
Noodles, traditional and instant	124.3	317	PT Indofood Sukses Makmur
Baked products, including biscuits, snacks, cakes and pastries	383.3	572	PT Bukit Manikam Sakti Khong Guan group companies PT Mayora Indah PT Konimex PT Ubindo Aneka Biskuit PT Danone Indonesia
Other prepared foods, including seasonings, spices, soy sauce and beverage syrups.	145.7	284	PT Ajinomoto Indonesia PT Miwon Indonesia PT Aneka Bina Cipta Central Food PT Indofood Sukses Makmur PT Suba Indah PT Nutrifood Indonesia
Edible oils, including margarine	461.3	57	PT Unilever Indonesia PT Sinar Mas
Beer and other alcoholic drinks	28.8	11	PT Multi Bintang Indonesia PT San Miguel Indonesia PT Suba Indah
Non-alcoholic beverages	115.4	215	Various Coca-Cola bottlers PT Pepsi-Cola Indobeverages PT Salim Graha Food & Beverages Sosro Group
Source: Biro Pusat Statistik, Indonesia (1995 survey published in 1997)			

Most of the businesses named above utilise imported food ingredients. Other businesses are mainly involved in processing local agricultural products, e.g. tea, fruits, vegetables, rice, sugar, fish/seafood and cassava, and are not major users of imported ingredients.

The country's large daily baked product sector comprises many small businesses which utilise locally manufactured wheat flour, margarine and sweetened condensed milk as their major ingredients.

A small number of large local and foreign businesses/joint ventures dominate the markets for branded processed foods. These businesses include PT Indofood Sukses Makmur, the country's largest food group controlled by the Salim Group, PT Nestlé Indonesia, the Mantrust group which controls PT Foremost Indonesia and PT Friesche Vlag Indonesia, the local Khong Guan group companies, PT Mayora Indah and PTAneka Bina Cipta Central Food.

The beverage market is dominated by the country's network of Coca-Cola bottlers, the Sosro group which produces bottled tea and the main brewer, PT Multi Bintang.

The Table below provides the most recent official data on industry output.

Indonesian Processed Food and Beverage Output in 1995	
	Tonnes
Soft drinks, including bottled tea ('000 Litres)	725,235
Noodles, instant and traditional dried	308,774
Condensed milk	177,227
Biscuits	138,734
Beer ('000 Litres)	113,677
Sugar confectionery	59,584
Canned fish and seafood	54,695
Bread	40,859
Soy sauce ('000 Litres)	48,790
Ice cream ('000 Litres)	7,600
Baby food	5,240
Instant coffee	4,993
Source: Biro Pusat Statistik, Indonesia (1995 survey published in 1997)	

In recent years, new foreign investment in Indonesia has increased the food manufacturing industry's product portfolio, bringing about an increase in the variety of products in the biscuit, ice cream, chocolate, sugar confectionery and non-indigenous snack products. Today, multinationals such as Group Danone (France), Nabisco, Nestlé and Unilever (Wall's Ice Cream) are using Indonesia as a production base for the ASEAN market.

3.5 Singapore

The Singapore food and beverage industry comprises just over 300 businesses with total output valued at about US$ 1.9 billion in 1996. Most of these are small to medium sized family-owned businesses which are involved in a broad range of different activities, ranging from traditional foods to modern frozen ready-to-eat foods.

The largest companies are either large local businesses or subsidiaries of foreign companies. These businesses dominate the beverage industry and have sizeable market shares in processed meats, dairy products, daily baked bread, sugar, wheat flour and edible oil.

The Table below provides an overview of the industry and highlights the names of the key businesses which are operating in Singapore today.

Sector	Value of Output in US$ Millions	Number of Businesses	Major Companies Involved
Meat processing, not slaughtering, including canning	26.5	14	Singapore Food Industries Auric Pacific Food Golden Bridge Foods Toh Li Food Products Amoy Canning Corp. Yeo Hiap Seng Limited
Dairy processing, excluding ice cream	184.9	8	Asia Dairies Malaysia Dairy Industries Yakult (Singapore)
Fish and seafood processing	93.7	27	Haton Food Industries Seawaves Frozen Food
Canned fruits and vegetables, not beverages	10.3	6	Pokka Food (Singapore) Sinsin Jam Manufacturing
Edible oils, including packing	275.5	11	Sime Darby Edible Products Ngo Chew Hong Edible Oil
Bread, cakes and confectionery	117.3	57	Gardenia Foods (S) Sunshine Bakeries Delifrance Singapore

Sector	Value of Output in US$ Millions	Number of Businesses	Major Companies Involved
Chocolate and chocolate products	113.9	6	Grace Cocoa Singapore Callebaut Asia Pacific
Noodles	48.5	29	Tat Hui Foods
Snack foods	33.5	13	Tong Garden Food Products Tai Sun (Lim Kee) Food Ind.
Soybean products	61.9	27	Sinsin Food Industries Tai Hua Food Industries Fortune Food Manufacturing Unicurd Food Co.
Spice processing	19.8	6	-
Cooked food preparations	55.2	35	Chinatown Food Corporation Dragon Shokukin Tee Yih Jia Food Mftg.
Other prepared foods, including sugar, roasted coffee, ice cream, packed tea, jellies, soups, biscuits, frozen pizza, food ingredients and food service industry supplies.	533.3	50	King's Creameries -Ice Cream Orkla Asia - Frozen pizza Singlong Foodstuffs - Desserts Khong Guan Biscuit Factory SIS '88 - Sugar Nestlé ASEAN - Ingredients Super Coffeemix Prima
Alcoholic drinks	169.6	5	Asia Pacific Breweries
Non-alcoholic beverages	165.4	7	F&N Coca-Cola Yeo Hiap Seng (Pepsi Bottler) Pokka Corporation

Sector	Value of Output in US$ Millions	Number of Businesses	Major Companies Involved
Note: No details are readily available on local production output in tonnes. Source: Economic Development Board, Singapore			

The Singapore industry has been under pressure from increasing business costs, increased competition from imported products and changes in demand as the local diet has modernised over the past 10 years. As a result, the nature of many of its food and beverage businesses has changed from mainstream manufacturing to a combination of manufacturing and marketing of imported products.

Since 1994, some businesses have closed their local manufacturing operations and transferred production to other Southeast Asian countries or China.

The sectors which have seen such business strategy changes include canned soft drinks, ice cream, daily baked bread, canned foods, soybean products, snacks, traditional foods, instant noodles and beverage powders, i.e. 3-in-1 coffee mixes.

The above trend is expected to continue into the long term. The recent collapse in the Malaysian Ringgit against the Singapore Dollar makes Malaysia even more attractive than in the past and a conjestion free second causeway to Malaysia provides better distribution access for firms which relocated to the neighbouring Malaysian state of Johor. Trade sources comment that this provides new opportunities for businesses producing beverages, edible oils and perishable products such as daily baked bread, ice cream, soybean products, instant noodles and frozen cooked foods.

Trade sources also comment that the significant changes in China's market will see continued investment by Singaporean businesses of all sizes. This may lead to China becoming an important base from which Singapore higher processed food businesses supply their home market in future.

The Singapore government is fully aware of the challenges facing its local food and beverage industry. It has established a broad development strategy to guide the industry towards higher end processed food manufacture, specialty food ingredient manufacture, research and development activities and the provision of services to Southeast Asia's food and beverage industries.

3.6 Vietnam

Vietnam's food and beverage processing industry is a complex mix of large state-owned enterprises, small to large sized producer co-operatives, small household businesses, Vietnamese private sector businesses and foreign owned businesses, which are mainly joint ventures.

The vast majority of the businesses operating in the sector process local agricultural and fisheries products and limited quantities of imported products into traditional/indigenous food and beverages. The key products manufactured by these businesses are milled rice, fish sauce, soybean products, coffee, tea, traditional liquors and coconut products.

The Ministry of Industry estimates that the value of output by the industry was Dong 35,082.8 billion (US$ 2.5 billion at current rates) in 1997, up from Dong 30,887 billion (US$ 2.3 billion) in 1996.

The Table below provides an overview of the numbers of medium to large size businesses operating in the sector, together with the names of some of the key players, if any, in each sector.

Sector	Number of State-Owned Enterprises	Number of Foreign Joint Ventures	Key Players from State Owned or Foreign Sectors
Meat, poultry and eggs	9	3	-
Fish and seafood	38	23	VISSAN
Dairy products	1	3	Vietnam Milk (VINAMILK) Friesland (Netherlands)

Sector	Number of State-Owned Enterprises	Number of Foreign Joint Ventures	Key Players from State Owned or Foreign Sectors
Coffee and tea	38	4	-
Processed fruits, vegetables, nuts and mushrooms	20	14	-
Wheat flour milling	1	2	Vinaflour (Vietnam/Malaysia)
Confectionery and baked products	12	4	Kotobuki (Japan)
Instant noodles	8	5	Ace Cook (Japan) Ve Wong (Taiwan)
Sugar and honey	29	3	Taiwan Sugar
Edible oil	25	3	Golden Hope (Malaysia) SCPL (France)
Beer and liquor	32	12	Saigon Brewery. Heineken/APB* (Singapore) San Miguel Corporation. Carlsberg.
Soft drinks	20	9	Coca-Cola Pepsi-Cola
Mineral water	9	12	-
Mixed and other processing activities	64	13	Vedan (Taiwan) Ve Wong (Taiwan) Regional state-owned businesses.
Source: Ministry of Trade, Vietnam *:Asia Pacific Breweries			

It should be noted that:

! The numbers of businesses provided in the above Table does not include the large numbers of small, mainly household, businesses which also operate in the food and beverage processing sector.

! The businesses listed as active in mixed and other processing activities include foreign joint ventures which process local starch crops into monosodium glutamate and other starch chemicals.

! The majority of foreign investments in businesses other than beer, soft drinks and dairy products comes from Taiwanese, Japanese and other Asian businesses.

The Table below provides the latest published data on food and beverage output by the industry.

Processed Food & Beverage Output in 1996	
	Tonnes
Canned fruits	16,318
Vegetable oils	47,390
Tinned milks (Estimated equivalent of 169 million tins)	50,000 to 55,000
Granulated sugar	111,000
Soybean curd	36,000
Tea	32,930
Fish sauce ('000 Litres)	167,000
Liquor ('000 Litres)	67,112
Beer ('000 Litres)	533,000
Source: Ministry of Trade (Published 1998)	

3.7 Myanmar (Burma)

Myanmar has several thousand businesses in its food and beverage processing sector. The structure of the sector is linked to Myanmar's 40 years of socialist history and gradual economic liberalisation which has taken place since the mid 1980's.

A recent study found that over 60% of the large businesses are still owned by the government, the private sector dominates the small and medium sized business sector and a small number of foreign joint ventures are involved in the production of beverages and edible oils.

Most of these businesses are unsophisticated when compared to those of the more developed industries in Singapore, Malaysia, Indonesia, Thailand and the Philippines.

The Table below provides an overview of the industry, inclusive of available production statistics and details of key businesses.

Sector	Number of Businesses	Comments
Dairies	40	5 larger businesses are involved in the production of condensed milk. Between 11,000 and 12,000 tonnes of condensed milk and 10,000 tonnes of butter was produced in 1996.
Ice cream	15	Producers are mainly small businesses with localised markets.
Sugar processing and sugar products	16	These businesses produce commodity products rather than high value added products. About 55,000 tonnes of refined sugar was produced in 1996.
Flour milling	10	These businesses produce commodities rather than high value added products. About 102,000 tonnes of wheat flour was produced in 1996 of which 70,000 tonnes was milled from local wheat.
Noodles and vermicelli.	19	18 firms produce traditional noodles. 1 business produces instant noodles. The sector produced about 33,000 tonnes of noodles and 5,000 tonnes of vermicelli in 1996.
Bakeries, cakes, biscuits and confectionery	90	Producers are mainly small with localised markets.This sector produced about 10,000 tons of product in 1996 according to government sources. This comprised 8,500 tons of biscuits and 1,500 tons of confectionery.
Infant foods	3	Include local businesses operating under the names of Baby Vita and Golden Cow.
Tea, coffee and spices	45	Production of traditional commodities rather than high value added products. Processed coffee and tea output was about 16,000 and 1,500 tonnes respectively in 1996.
Other processed foods	35	Producers are mainly small businesses manufacturing traditional products for localised markets.

Sector	Number of Businesses	Comments
Edible oils	20	Includes Myanmar Kuok Oils and Grains Ltd, a Singapore linked company which is the largest processor. Edible oil production is estimated at about 363,000 tonnes in 1996.
Beer and other alcoholic beverages	5	This sector produced about 13 million litres of alcoholic beverages in 1996. The main businesses are: C Myanmar Brewery Ltd (Linked to Singapore) C The Myanma Yaung Chi Oo Co., Ltd C Peace Myanmar Group Co., Ltd
Non-alcoholic beverages	5	About 50 million litres of soft drinks, mainly carbonated beverages, were produced in 1996.
Source: Government of Myanmar and FAO		

Myanmar companies also produce dried, canned and frozen fish/seafood. No accurate data is available on this sector although trade sources comment that it is large, with recent output possibly exceeding 150,000 tonnes.

The Government is promoting the development of Myanmar's food processing industry and has opened the industry for investment from foreign businesses. While trade and investment sanctions exist and have forced a small number of foreign businesses to withdraw or cancel their investments, Asian, particularly Singapore businesses, are continuing to invest in the industry.

In the first half of 1998, the Government introduced an austerity package which changed the business environment in Myanmar. The package included bans on imports of a broad range of foods and exports of essential foods such as rice, sugar and edible oils.

Today, the Government is seeking foreign investors to develop new "export-only" food processing businesses in a country where most trade sources see long term local market potential to be the main attraction. Sanctions aside, this situation does not bode well for future development of Myanmar's food processing industry.

3.8 Cambodia

The food and beverage processing industry represents about 48% of the total output of its industrial sector. This equates to 6% of total gross domestic product or about US$ 185 million in 1996. The industry comprises about 30 medium/large-sized businesses and several hundred small businesses. It employs about 6,000 people.

Government sources comment that beer, soft drink and traditional liquor production are 3 of the 5 largest manufacturing activities in Cambodia. The Table below highlights the major business segments and the key players in the industry today. Other businesses are mainly involved in the production of traditional foods.

Sector	Number of Larger Businesses	Key Companies
Flour milling	1	Asia Flour Mill Corporation
Baked products	4	All daily baked product businesses producing bread and cakes.
Sugar refining	1	Bun Samnang
Canned foods	1	Sun Wah Fisheries Co Ltd
Processed milk	1 firm producing 600,000 cans	Aspara Milk Factory
Soft drinks	2 firms producing 400,000 cases	Cambodia Beverage Co (Coca-Cola) Angkor Beverage/Pepsi Joint Venture
Beer	2	Angkor Beverage Co Cambodia Brewery Limited
Traditional rice liquor and wine	3, the whole industry produces 6,000 tonnes.	Cambodia Winery Societe Khemer des Distilleries Tony Ly Pharma Co. Ltd Dam Bang Dek
Source: Ministry of Industry, Mines & Energy and Phnom Penh Chamber of Commerce, Cambodia (1997)		

Food processing will remain an important activity into the long term, i.e. as a source of export earnings and food security for Cambodia.

As the local market for higher processed foods will continue to be small, the bulk of new processing activity will involve local products destined for the export market. While the government has been promoting food processing opportunities to foreign investors, the high level of political instability existing today and the small domestic market undermines Cambodia's attractiveness as a venue for foreign direct investment.

3.9 Laos

The food and beverage processing industry in Laos produces rice whiskey, beer, soft drinks, fish sauce, rice and wheat noodles, bread and other baked products, roasted coffee, black tea, vegetable oil and sugar.

The industry comprises mainly small businesses which operate with less than 10 persons. The largest businesses produce beer, rice whiskey and soft drinks and account for 25% of the country's industrial output. The larger businesses are wholly or partially owned by the state.

The Table below provides some information on production output and identifies some of the key businesses operating today.

Product	Production	Major Companies
Candies and bread	700 tonnes	-
Fish sauce	1.3 Thousand Hectalitres	-
Traditional liquor	1.5 Thousand Hectalitres	-
Beer	150 Thousand Hectalitres	Lao Brewery Company
Soft drinks	110 Thousand Hectalitres	Lao Soft Drink Company
Fermented fish	280 Tonnes	-
Source: Government of Laos, National Statistics Centre		

Trade sources comment that most, if not all, of the above products are consumed in Laos.

The Sixth Party Congress held in 1996 identified agricultural processing as a key area of future development for the country's industry. This is considered important because agriculture accounts for about 50% of national output and supports about 80% of the population.

The development plans which have been drawn up revolve around increasing small and medium sized business activity in the rural areas. This pragmatic approach is being taken because the government realises that the country's landlocked and isolated location is disadvantageous for exports and so a barrier to attracting major foreign investment to its food processing sector.

The future focus of the industry will remain the local market. Increased localised exports to neighbouring areas of Thailand are also thought a viable business proposition now that road links have improved between the two countries.

3.10 Brunei

Brunei has about 45 businesses involved in food and beverage processing. Most are small to medium sized businesses. No data is published on the size of the sector.

The sector has developed to serve the local market with perishable foods, e.g. fresh meat and poultry, ice cream and daily baked items, and to process local agricultural products, e.g. spices and coffee, for the local market and for export.

The Table below provides an overview of the structure of the industry in 1998.

Sector	Number of Businesses	Comments
Poultry and meat processing	8	These businesses are involved in slaughtering and dressing activities rather than high processing activities.
Dairy processing, including ice cream	4	Includes Orient Ice Cream & Cold Storage.
Bakeries	9	These businesses include Gardenia Food Industries Sdn Bhd.
Spice and coffee processing	2	Family businesses are involved in this sector.
Other food products	5	Traditional local foodstuffs.
Beverages	2	Includes the Brunei operation of Fraser & Neave (Singapore).
Fast food and catering businesses	6	These businesses include the Food Manufacturing Department of Royal Brunei Catering which produces bread and confectionery.
Source: Brunei Malay Chamber of Commerce		

Brunei's industry is likely to remain small, although the government has targeted higher processed food and beverage manufacture as a future growth area for its local industry.

Improved food security, especially in meat, poultry, eggs, fruit, vegetables, milk and fish/seafood, and the desire to create a more diverse job base are the main reasons for promoting the development of this sector. Exports are likely to remain a minor part of the sector's business in future.

4. The market for ingredients, additives and chemicals

4.1 The role of local supplies

The countries of Southeast Asia, except Singapore and Brunei, are leading producers of a range of agricultural products. Fish and seafood is also a major sector in most countries. As a result, their local food and beverage manufacturing companies often rely heavily on locally sourced materials unless no substitute for imports are available. Years of protectionism has also led to the development of local substitutes for some imports, e.g. palm oil substitutes dairy fats and rice and tapioca are used as an ingredient by brewers and biscuit producers.

The region also has chemical industries located in the various countries which are involved in the manufacture of various chemicals. These include food additives and other chemicals which are commonly used by food and beverage manufacturers.

This section considers the market size and structure based on a scan of import data for a range of key food ingredients. The scan considered the market in two parts:

! Imported foods used as ingredients.

! Imported food additives and other chemicals used by food manufacturers.

4.2 Imported food used as ingredients

Imported food used as ingredients are defined as meat products, fish and seafood, dairy products, vegetable and vegetable products, fruits and nuts and their products, herbs and spices (not chemical flavours), cereals and cereal products, pulses and pulse products, fats and oils, cocoa and its products, sugars and sugar derivatives and starch and starch derivatives.

Today's market for the products covered by the scan is valued at more than US$ 7.9 billion. The Tables below provide a broad overview of the market structure.

Value of Southeast Asia's Imports of Food Ingredients (US$ Billions)		
	US$ Billions	**%**
Fish and seafood	1.62	20.4
Rice	1.43	18.0
Dairy products	1.38	17.4
Sugar and its products	1.35	17.0
Fruits, vegetables and nuts	0.79	9.9
	US$ Billions	**%**
Edible oils, not oil seeds	0.30	3.8
Cereals and starches, not rice	0.26	3.3
Meat and poultry	0.25	3.2
Cocoa and its products	0.16	2.0
Spices	0.10	1.3
Other food ingredients	0.29	3.7
Total	7.93	100.0
Source: National governments and FAO (Data for 1996)		

Total Imports of Selected Foods by Country in 1996 (In Tonnes)			
Country	**Total**	**Rice**	**Other Products**
Brunei	61,297	22,297	39,000
Cambodia	144,419	81,000	63,419
Indonesia	3,935,387	2,040,203	1,895,184
Laos	49,820	28,000	21,820
Malaysia	2,711,231	568,022	2,143,209
Myanmar	101,541	-	101,541
Philippines	2,314,267	866,837	1,447,430
Singapore	1,966,982	262,329	1,704,653
Thailand	1,035,312	125	1,035,187
Vietnam	615,590	11,000	604,590
Total	12,935,846	3,879,813	9,056,033
Source: Trade data from national governments & FAO data			

The countries of Southeast Asia produce the bulk of rice, fish and seafood, sugar, edible oils, starch crops, meat and poultry, cocoa and spices which are consumed in their home markets. Key imports include dairy products, temperate climate fruits, vegetables and cereals.

The reader should also take into account the following matters when interpreting the above data:

- Fish and seafood is a very important part of the diet in Southeast Asia, therefore a high percentage of imports are consumed by households. Having stated this, the region has a large fish and seafood processing sector which relies on imported products because of shortages arising in the local catch. Thailand, Singapore and, to a lesser extent, Malaysia and the Philippines have sizeable industrial demand for fish and seafood.

- Imported rice is generally consumed by households in Southeast Asia rather than by the processing industry. The main importers of rice are Indonesia, Philippines and Malaysia which regularly have shortfalls in supply from local sources. Singapore is also a major importer because it has no rice farms.

- The bulk of dairy products imported to the region are used by local industries to produce a range of different dairy products, i.e. sweetened condensed milk, recombined milk beverages and ice cream. Most countries also have businesses which repack full cream, skimmed milk and infant formula powders into cans for sale in the local market.

- Imported sugar is used by both households and local food manufacturing industries. The major importers are Malaysia, Indonesia and the Philippines which import to fill shortfalls in local supply. Key industrial users of sugar throughout the region are sugar repackers and manufacturers of soft drinks, sugar confectionery, chocolate and baked products.

- A wide range of temperate climate fruit, vegetables and nuts are imported by Southeast Asia. While some, such as apples and fruit juices which account for close to 40% of imports, are consumed mainly by higher income group households, the balance of imports are used mainly by food manufacturers. Producers of snacks, beverages and baked products and food service operators are key users of these products.

- Edible oils are mainly imported by large businesses involved in repacking such products. Small quantities of packaged products, mainly specialty oils, are imported for sale in the region's more affluent cities.

- Non-indigenous cereals and starches are imported in bulk for primary processing by local food manufacturers. Wheat and barley form the bulk of imports and are used by the region's large flour milling and brewery businesses. Wheat flour is used by the region's producers of noodles, biscuits and daily baked products.

- Meat and poultry is mainly imported by the more affluent nations, i.e. Singapore, Malaysia and Brunei, which suffer deficits in local supply. These imports are consumed by households or used by food service operators and, to a lesser extent, used by manufacturers of processed meats. Only small quantities of imports are utilised by food processors in the region's other countries.

- Cocoa and cocoa food ingredients are mainly imported for use by the region's chocolate and confectionery producers and exporters. Singapore also imports cocoa products from its neighbours to supply its cocoa product trade which serves a world-wide customer base.

- Imported spices are consumed by households and used by food manufacturers. Spices are an important part of the region's cuisine, although the types used and their usage often differ radically from country to country. This arises because the region does not have a homogenous traditional food culture.

- A broad range of other food ingredients are imported to supply demand which has been stimulated by modernising local diets. In the major cities, these include food types which have been adopted from other parts of the world, i.e. Europe, North America and Japan.

- Singapore's imports include products which are re-exported to other countries in the region. This re-export trade has been gradually diminishing as Singapore's neighbouring countries are increasing their direct imports (See Appendix B).

A review of the import data summarised in Appendix A to this executive briefing highlights that imports have generally seen growth over the 5 year period to 1996/1997. The only exceptions to this general pattern were in:

- Meat and fish/seafood imports to Thailand. Trade sources comment that these reduction arose because of increases in local production of meats and improved local fish landings as a result of agreements between Thailand and some of its neighbours for rights to fish in their waters.

- Vegetable, fruit and edible oil imports to Singapore. Trade sources comment that these reductions arose because of the sourcing of lower priced fruits and vegetables from overseas, particularly Indonesia and China and the closure of some edible oil processing plants in Singapore.

- Oil seed imports to Indonesia. Trade sources comment that this arose because of increased output of local grown palm oil which is now a major source of raw materials for edible oil processors.

4.3 Food chemicals and other additives

The region's market for imported food additives and other chemicals used by food manufacturing companies is estimated to be valued in excess of US$ 1.6 billion today. Included in this figure are products which are imported to Singapore for re-export throughout East Asia Pacific and South Asia. The Table below provides an overview of the market structure based on a review of import data for 1996, the year for which all official data is currently readily available.

Profile of Southeast Asian Food Additive and Chemical Imports		
	Tonnes	**US$ Millions**
Singapore, including re-exported products	329,116	515.3
Malaysia	624,247	163.4
Indonesia	1,021,575	390.6
Thailand	380,907	244.9
Philippines	570,347	189.5
Vietnam (Official data & trade estimates)	20,000	NA
Myanmar (Official data & trade estimates)	5,000	NA
Laos (Official data & trade estimates)	1,500	NA
Cambodia (Official data & trade estimates)	2,500	NA
NA: Not available Note: Brunei's market for additives and other chemicals is very small. It is mainly serviced by suppliers based in Singapore. Source: National statistics for 1996 and trade estimates.		

The reader should note that not all food additives and chemicals used by Southeast Asian food manufacturers are imported. In particular:

! Singapore has a sizeable chemical industry which is involved, among other things, in the manufacture of chemicals used by such businesses. It is also a base for some of the world's leading flavours and fragrances businesses.

! Other countries, such as Thailand, Malaysia and Indonesia, have businesses which manufacture chemicals from indigenous products. For example, local starch crops are used to produce monosodium glutamate, citric acid, sorbitol, mannitol, maltodextrin and other starch-based products.

The region also has local manufacturers of yeast, essential oils, agar-agar and gums.

Singapore is one of Asia's major chemical re-export centres. Over 60% of its imports are re-exported. This equated to over 200,000 tonnes of chemicals and additives in 1996 (See Appendix B for an overview). Singapore suppliers have major markets in Southeast Asia.

Bangkok based suppliers are a key source of supply for businesses operating in neighbouring Laos. About 10,000 tonnes of chemicals and additives were re-exported to Laos, Vietnam, Cambodia and Myanmar in 1996. Hong Kong is another source which re-exported just over 5,000 tonnes of chemicals and additives to various Southeast Asian countries in 1996.

5. The regional crisis and its broad impact

Southeast Asian countries are either experiencing an economic downturn or have economies which are officially in recession. This situation has arisen from currency and financial sector problems which have undermined some sections of the local industry which were highly geared or funded by foreign currency loans. The resulting business failures and downsizing have led to:

- Declining manufacturing output.
- Declining exports and rates of export growth.
- Rising unemployment

Most countries, whose local currency value has collapsed against major currencies, are also seeing rising retail and wholesale price inflation, largely because of the higher costs of imports. Higher local interest rates on business loans have also added to business costs and hence inflation.

The main impact of unemployment has been on the modern middle-class consumer societies which exist in Bangkok and Jakarta and other provincial cities in Thailand and Indonesia. The other countries of the region have, so far, seen much less dramatic impacts on their urban societies because the incidence of business closure and unemployment is significantly lower than in Thailand and Indonesia.

Two societies in the region have seen little impact:

- The region's small high income group which continue to earn high incomes from their businesses and continue to spend like consumers in the Developed West. These consumers are the main reason why, for example, Bangkok's consumer society is still highly evident, although somewhat reduced.

- The rural societies throughout the region, which "live off the land", are largely unaffected by the crisis. In some places, i.e. rural Thailand and Indonesia, these people are benefiting from increased demand for lower priced traditional foodstuffs.

These factors have changed conditions in the local market for processed food and beverages. Trade sources comment that:

- The consumption of imported finished products has fallen either because they are no longer been imported or because they are being ignored by local consumers due to unreasonable retail pricing.

- More affluent urban consumers are generally still loyal to their preferred brands but have cut back on the frequency of their purchases.

- In provincial cities, consumers are generally trading down to less expensive brands and products.

- Government sponsored "Buy Local - Consume Local" campaigns now exist in most countries. Trade sources comment that these campaigns are generally effective in re-directing consumer purchasing towards locally manufactured products.

A recent survey of senior management of food and beverage companies in Thailand found that many were pessimistic about early recovery. 60% of the respondents saw recovery only in 3 years and the balance earlier. This scenario is likely to be similar in other countries which are now experiencing a recession.

Today, all key businesses in the region are attempting to operate their businesses in a manner which deals with the inevitable challenges that will face them over the next 3 years or so. Many are foreign businesses with a long term view or proud family-owned local companies with a "will to survive". Their activities include:

- Actively supporting the "Buy Local-Eat Local" campaign. Localisation of foreign-named businesses via A&P campaigns, stressing their use of local inputs and labour and, in some cases, their prowess as exporters earning foreign exchange for their home country.

- Increasing production of local style foods or localised non-indigenous foods which meet closely with consumer demands for price, taste and quality.

- Reducing retail prices of preferred brands and continuing to support products through A&P activities and increasing A&P activities. Increasing marketing activities in provincial areas where the unemployed are now working and viable customers, although with lower purchasing power and hence demand.

- Absorbing increased costs of imported inputs and increasing activities to develop and use local products as substitutes for imports.

- Consolidating businesses around core profit centres, especially higher value added foods and export products in their portfolios. Divesting non-core businesses, including those located overseas and eliminating marginal products from the manufacturing portfolio.

- Generally reducing debt levels. Bringing in foreign partners to improve financial position, product portfolio and technical abilities.

In addition to the above activities, some export-oriented companies see the low value of their local currency as a significant opportunity to invest in factory expansions to support increased future exports to the ASEAN region and other parts of Asia. Multinational companies with long term views are also involved in this type of activity.

6 The regulatory environment for ingredients and additives

6.1 Overview of the region's food regulations

Southeast Asia does not have a homogenous regulatory environment for food ingredients, additives and other chemicals used by food manufacturers. Today, the region's regulatory environment for food ingredients, additives and chemicals ranges from Singapore's, which is similar to those in the Developed West, to Cambodia's, which according to the World Health Organisation, has no food laws, although laws are in place which cover import access.

Some key points to note about Southeast Asia' s regulatory environment for food ingredients and additives and chemicals used by food manufacturers are:

! Singapore regulates imports of food ingredients and additives through its Food Regulations. Imports of products generally require a licence which does not form a barrier to products considered safe for use in locally manufactured foods. All food ingredients which are new to Singapore are referred to Food Advisory Committee for approval before they are legally accepted for use in Singapore. In addition to this, the Poisons Act regulates some types of chemicals.

! Malaysia regulates its imports of food ingredients and additives through its Food Act and related regulations which is enforced by the Ministry of Health. A Control of Supplies Act also exists which affects products which are deemed necessities in Malaysia, e.g. wheat flour supplies and prices are monitored under the provisions of this Act. The Trade Descriptions Act 1972 (Use of Halal) Expressions Order is also used to monitor the use of the term *Halal* (indicating the product can be consumed by Muslims) by imported foodstuffs. Licensing exists for a limited number of products but is more a quality control tool than a trade barrier. The Poisons Act may also regulate certain chemicals imported for use by food companies.

! In Thailand, the Thai Government's Food & Drug Administration (FDA) establishes all regulations covering food ingredients and additives. The regulations are enforced for foreign products by the Customs Department at the point of import through a system under which importers and imports have to be licensed prior to import. The licensing procedures include food health and safety tests by the FDA on a sample of the product proposed for import.

! Indonesia has a comprehensive set of regulations governing the import and production of foodstuffs, which include definition of approved food ingredients and additives. The regulations are established by the Ministry of Health. The Directorate-General of Drug & Food Control is the controlling agency which implements the regulations. Indonesia's stringent import controls have been gradually liberalised over the past 5 years. All imports still require a licence from the Department of Trade.

! In the Philippines, the Philippine Government's Bureau of Food & Drug (BFD) establishes all regulations covering food ingredients and additives under powers vested in the Food, Drug and Cosmetics Act, as amended by subsequent legislation. The U.S. food regulations as detailed in the Code of Federal Regulations form the main reference for the BFD's own extensive regulations which apply to both local and imported products. The BFD's regulations cover food ingredients and additives. Product registration requirements exist for finished products which include scrutiny and testing of content by the BFD's own laboratory.

! Vietnam has a number of regulatory systems depending on the nature of the product being imported and whether it is subjected to any import quota, annual planned import system or being imported to cover a local shortage. The Ministry of Trade is responsible for licensing imports under these systems and the Customs Department for clearance of imported goods into the country. A limited system of import quality controls exist with inspections being made of items such as imported wheat flour, monosodium glutamate, milk, sugar, food additives and vegetable oil.

! Myanmar recently tightened its import controls by banning the imports of some foods and beverages as part of its austerity measures to insulate its economy from the effects of the economic downturn in East Asia. Imports of permitted products can only be made by a registered importer after a license has been obtained for each inward shipment and other local foreign exchange and customs regulations have been complied with. The Directorate of Trade is responsible for considering import license applications.

Re-exporters in Singapore generally have contacts with Bruneian and Cambodian importers who fully understand the legal requirements for importing products into these countries. This is also the case for Bangkok based re-exporters to Laos.

The reader should note that Southeast Asia's regulatory environment for food products is not static. In some cases, interpretation of the regulations is subjective, depending on individual circumstances. **For this reason, exporters should always check the most recent legislation as there is likely to be change in future. The local agent or importer is usually the best source of information on regulatory compliance as they are unlikely to breach local import law or practice because of the risks of loss that might arise should a breach occur.**

6.2 Overview of the region's import tariffs

Most countries in Southeast Asia have a complex tariff schedule. Import tariffs vary dramatically from country to country and from product to product. Singapore and Brunei generally have low tariffs on all products. In the other countries, higher import duties are generally levied on products which compete directly or indirectly with local products. Products which are not made locally generally have low duties levied or can enter duty free. This "rule of thumb" is particularly important in the less developed countries, e.g. Vietnam, Myanmar, Laos and Cambodia .

The position in Malaysia, Thailand, Indonesia and the Philippines is more complex because large businesses have extensive involvement in the local market. These countries are also liberalising their markets in line with GATT and WTO commitments and under the provisions of the ASEAN Free Trade Area agreements.The Table below provides some examples of the range of import duties for major countries and key product groups considered by this executive briefing.

Overview of Import Tariff Ranges				
	Malaysia	**Thailand**	**Indonesia**	**Philippines**
Meat products	0%	60%	5% to 25%	10% to 80%
Dairy products	0% to 25%	5% to 60%	5 % to 20%	3% to 20%
Spices and herbs	0%	Mainly 30%	5% to 20%	3% to 10%
Cereals and starches	0%	40%	5% to 10%	10% to 80%
Vegetable gums & saps	0%	15% to 20%	5%	3% to 10%
Edible oils	0% to 20%	Mainly 30%	5% to 15%	3% to 20%
Fish and seafood	0% to	30% to 60%	5% to 20%	10% to 20%
Sugars	0%	20%	0% to 20%	3% to 80%
Cocoa ingredients	15% to 30%	10%	5% to 10%	3% to 10%
Nuts	15% to 30%	10% to 30%	5% to 20%	10% to 20%
Vegetables and pulses	0% to 20%	30% to 60%	15% to 30%	3% to 80%
Fruits and fruit juices	0% to 20%	30% to 60%	5% to 25%	10% to 20%
Yeasts	0% to 25%	30%	5%	3% to 10%
Other chemicals	Mainly 0%	Mainly 10%	5% to 20%	3% to 10%
Vitamins	0%	10%	0%	3%
Source: National tariff schedules				

The above list is only indicative. Some countries, e.g. the Philippines, still have quota systems under which out-of-quota imports incur very high rates of import duty. Other countries, e.g. Thailand and Indonesia, also levy Value Added Tax (VAT) on imports.

As tariffs, quota arrangements and other tax rates are subject to change for a number of different reasons, the reader is advised to consult the latest official schedule for tariff rates, quota sizes and other taxes which are applicable to their products.

7. Procurement and distribution in overview

7.1 Purchasing criteria and sourcing arrangements in overview

Food manufacturers are generally conservative in using new ingredients or new suppliers. They commonly remain loyal to a known product and known supplier unless a problem arises with product quality, price or service. This is one of the main barriers to new entrants to the ingredient's market. Having stated this:

! Buyers are always seeking lower cost products to increase their buying power with existing suppliers or to consider genuinely lower cost products with an equivalent quality to those of their existing supplier.

! Many food manufacturers react well to attempts to educate them about new ingredients, especially if the product provides real benefits to their business.

Food manufacturers in Southeast Asia procure their food ingredients, additives and chemicals from different sources:

! Multinationals and large local businesses, especially those with high volume demand for a range of ingredients, commonly source their food ingredients direct from suppliers, whether local or foreign.

  Businesses such as Nestlé, brewers and flour millers are examples of businesses involved in direct imports. Products with low volume demand are procured on a local basis, normally from specialist importers.

  Some of the larger businesses, e.g. Nestlé, have centralised purchasing agreements for major food ingredients. These agreements are tendered out on a period basis to businesses with the capability to supply high volumes to a group of businesses located in the Asian region. These businesses also "champion" the use of local food ingredients as part of their business strategy in different countries. This has led to some substitution of imports with high quality local products, i.e. meats, poultry, tomato purees, barley and starch based chemicals.

! Medium and small sized businesses generally procure their food ingredients, additives and chemicals from local importers.

  The most complex supply channels in the region serve the large and highly fragmented daily baked products sector.

All countries have their own food ingredient importers which serve all sizes of businesses with their needs. It should also be noted that:

! The medium to large sized importers usually import directly from overseas whereas smaller importers import from an intermediary in another country. For example,:

  < Importers in Cambodia, Myanmar and the southern parts of Vietnam are serviced by Singapore re-exporters.
  < Importers in the Philippines and the northern parts of Vietnam are serviced by Hong Kong re-exporters.
  < Laos importers are serviced by Bangkok, Thailand re-exporters.

! Singapore is a major centre for distribution of food additives and chemicals to the region. Its businesses have strong links with distribution channels for these products throughout the region. In many cases, these links now involve related companies which act as importer/distributors.

7.2 Selling to Southeast Asian food manufacturers

The fragmented nature of the region's industry and the distribution channels make it important for exporters to develop some form of presence in their target markets.

The most basic arrangement involves establishing a chain of agents to service the key countries and appointing an agent or series of agents to develop business in the countries with smaller demand, e.g. Brunei, Cambodia, Laos and, in the short term, Vietnam and Myanmar. It should be noted that Vietnam and Myanmar are likely to see much larger markets in the medium to long term future.

The key purchase criteria which have to be met are:

! Quality must be appropriate to localised demand criteria. In some less quality conscious countries, this ranks second to price.
! Competitive pricing. Pricing is very important because the consumer markets are highly price sensitive as margins can be thin for a wide range of products.
! Service consistency and local presence. This is important to develop long term trust between buyer and supplier.

Product information and education can be important especially for businesses with younger management teams. It is better for the local agent to make a direct presentation about a new ingredient, additive or chemical rather than providing such information on a remote basis, i.e. by fax, mail or e-mail.

Finally, it should be noted that management in Singapore and the Philippines are comfortable with the English language whilst in other countries, local language presentations and literature may be important to get the message across to buyers.

8. Future opportunities and directions

8.1 The region's economic downturn and its implications

Contrary to reports in the international press, production and trade has not ground to a halt in Southeast Asia. While it is true that countries such as Thailand and Indonesia have experienced a severe credit crunch which has curtailed some import trade, the import trade in foodstuffs and additives is still strong because many imported foods and foods manufactured from imported ingredients are well entrenched in local diets.

Since the economic downturn, the markets have become a complex mix of price competition and service based competition as existing suppliers fight to survive in a new business environment which includes:

! Variable or shrinking markets as a result of shrinking demand for non-traditional foods, especially among consumers on the fringe of the processed food market. This is caused by localised unemployment and a lack of consumer confidence.

! Higher price sensitivity amongst ingredient buyers as a result of difficulties in passing cost increases onto the equally price sensitive end consumer.

! Product formulation adjustments by manufacturers to cut production costs. Higher priced ingredients are a key target. Increased efforts are being made to substitute local products for imports.

! Cuts in the product portfolio to eliminate marginal and unprofitable products.

! Packaging mix changes. This is occurring to provide potential consumers with a smaller, less expensive package.

! Distributor fall-out. This has arisen in Thailand due to bankruptcies.

In Thailand and Indonesia, imports have been falling since their economic downturns started because of a lack of available import trading credit. This arose because of the widespread failure in these countries' banking systems in 1997.

Economic downturns and slowdowns are not a new phenomena in Southeast Asia. The following events have happened in the past 20 years:

Country	Time	Reason
Indonesia	Late 1970's/Early 1980's	Oil price collapse.
Thailand	Early 1980's	Agricultural pricing collapse, economic fundamentals and speculation.
Malaysia and Singapore	1986 to 1987	Speculative bubble and outflow of investment funds.
Philippines	1986 to 1992	Political strife and natural disasters.
Brunei	1988 to 1993	Oil and construction industry slowdown.
Vietnam	Periodic downturns since 1989	Government actions, both political and economic, and a lack of international confidence.

Economic commentators point out that the difference between the above events and the current economic downturn is in the scale of future growth potential. The growth potential of the coming 10 to 15 years is likely to be far more modest than the 7% to 15% growth rates experienced by Thailand, Indonesia, Malaysia and Singapore after they moved out of their last recessions.

Most commentators believe that after the current economic crisis has passed economic growth is likely to be in the region of 3% to 6% per annum. Such rates of growth are in excess of those for the developed world which is forecast by economic commentators to grow at rates of between 1.5% to 3% per annum over the same period.

Subject to a global economic downturn, most commentators see Southeast Asia returning to these higher rates of economic growth in 3 to 5 years time.

Food industry management, particularly those working with multinationals, view the economic slowdown as a time to entrench their position in the market and industry. They take a long term view of opportunities and are, as a result, positive about the future of their businesses. For this reason, their key suppliers, both local and foreign, are also likely to see a positive future.

While the ASEAN Free Trade Area and private sector reaction are important regional stimuli for future development of its food manufacturing industry, exporters should also be aware of the policies and activities of specific governments to develop their home industries. Some future supply opportunities will result from such policies and activities. For example:

! Singapore is promoting itself as a regional ingredient trading and R&D centre for the food manufacturing sector.

! Malaysia is promoting itself as a centre of excellence for halal food production. Trade sources comment that it is already viewed as such by halal food and beverage importers based in the Middle East and other areas of the world.

! Thailand is promoting the upgrading of its local food and beverage manufacturing industry so that its higher processed foods meet closely with EU and US standards, thus increasing its opportunities in those markets.

8.2 Key points to consider in developing export strategies

Southeast Asia's markets became the focus of most of the world's food ingredient, additive and chemical suppliers during its 10 years of continual economic growth. As a result, its markets have become very competitive and well supported, often from a local base. Regional markets are also expected to evolve over the longer term under the new trading environment established by AFTA.

US exporters need to fully understand demand in each country and identify clearly where it comes from and how to service it. It is very important to note that Southeast Asia is a series of distinct national markets rather than a single regional market.

Other supply-side points which need to be considered by US exporters are as follows:

! The competitive strengths of existing suppliers, both local and foreign. Southeast Asia imports food ingredients, additives and chemicals from all over the world, including the USA, EU, Australia, New Zealand and other parts of Asia, i.e. China and Japan.

! The competitive strengths of key foreign supply businesses with marketing offices and other support businesses in the region.

! The centralised purchasing agreements that may exist for some products, e.g. some dairy ingredient and supplies to fast food restaurant chains.

! The different levels of negotiating power which exist between ingredient buyers with multinational manufacturers, large local manufacturers, importers and medium to small sized manufacturers.

! The different channels which are needed to service different industries, e.g. direct buying by grain millers and localised channels needed to supply bakeries.

! Importers' requirements for a diversified product portfolio. Trade sources comment that this is now very important as specialisation is seen as a weakness under economic downturn conditions.

The following demand side factors also need to be considered:

! The high degree of inertia which exists amongst buyers towards changing supplies and suppliers.

! Large businesses' expectations that all of their suppliers :
< Have local presence.
< Be well established in their respective businesses.
< Be technically competent.
< Be financially sound.

! The real meaning of product quality. It is important that suppliers fully understand each buyer's definition of quality rather than assuming that the buyer's definition is the same as theirs. The definition of quality level varies significantly throughout Southeast Asia.

8.3 Future prospects for suppliers to the region

While the current economic downturn has some negative connotations for suppliers of ingredients, additives and other chemicals used by food manufacturers, demand for such products will remain relatively strong amongst companies which lead their market segments or are involved in exporting processed foods and beverages. Export oriented companies are insulated, to an extent, from the regional turmoil.

Demand will vary from country to country because of the different strengths and weaknesses of local food manufacturers and differences in their own opportunities and threats. Some of the key targets for US exporters are detailed in the Table below.

Country	Food Manufacturing Industry Sectors
Thailand	Fish and seafood processing. Dairy processing. Wheat flour milling. Baked product manufacturing. Noodle manufacturing. Brewing.
Malaysia	Fish and seafood processing. Dairy processing. Vegetable canning. Wheat flour milling. Baked product manufacturing. Noodle manufacturing. Soy sauce and other soybean product manufacturing. Brewing. Soft drink manufacturing.

Country	Food Manufacturing Industry Sectors
Philippines	Processed meats manufacturing. Dairy processing. Edible oil manufacturing. Wheat flour milling. Baked product manufacturing. Brewing. Soft drink manufacturing.
Indonesia	Dairy processing. Wheat flour milling. Noodle manufacturing. Baked product manufacturing. Soybean product manufacturing. Soft drink manufacturing.
Singapore	Meat processing. Dairy processing. Fish and seafood processing Edible oils processing. Flour milling. Noodle manufacturing. Daily bakeries. Snack foods manufacturing. Soybean products manufacturing. Brewing. Soft drink manufacturing.
Vietnam	Dairy product processing. Flour milling. Daily bakeries. Noodle manufacturing. Brewing.
Myanmar	Brewing (Local barley is a key source). Flour milling (Local wheat is a key source). Dairy processing (Local milk is a key source).
Cambodia	Dairy product processing. Daily bakeries. Brewing.
Laos	Brewing. Daily bakeries.

Country	Food Manufacturing Industry Sectors
Brunei	Daily bakeries. Ice cream manufacturing.

In conclusion:

! The key markets for imported food ingredients are found in Malaysia, the Philippines, Indonesia and Singapore. Thailand has a more limited market because of its concentration on utilising local products. The other markets have more limited demand which is concentrated around a few imported products which are not produced locally or for which shortages in local supply arise.

! The region's market for food additives and other chemicals used by food manufacturers is quite broad-based and covers all countries in the region. While local supplies do exist, they are generally not comprehensive enough to supply all local needs. Singapore is an exception because it is a trading base for food additives and chemicals suppliers targeting the region and other parts of Asia.

Appendix A

Thailand - Trends in Key Import Categories (In Baht '000) (Current Forex Rate - Baht 38.53 : US$ 1.00)					
	1996	**1995**	**1994**	**1993**	**1992**
Foodstuffs (Note 1)					
Meat & poultry	113,384	132,352	109,672	162,158	141,529
Fish & seafood	17,131,426	17,074,816	17,008,321	18,392,132	23,380,546
Dairy products	9,731,755	8,777,594	6,645,258	5,395,627	5,689,394
Fruits & vegetables	3,308,185	3,416,818	3,076,944	2,585,348	1,723,290
Coffee, tea & spices	171,432	127,495	182,708	123,249	107,768
Cereals & products	8,945,138	7,290,696	5,694,820	4,791,878	5,769,506
Oil seeds	4,998,566	3,362,570	2,533,961	1,734,074	2,287,613
Edible oil	2,275,351	2,378,134	1,612,540	1,407,703	1,400,101
Sugar & products	433,422	392,322	308,177	236,983	217,445
Cocoa & products	964,992	857,327	624,703	432,965	469,097
Chemicals (Note 2)					
Inorganic chemicals	9,554,731	9,097,731	7,390,349	7,004,852	6,527,695
Organic chemicals	55,043,527	66,108,978	44,741,228	35,181,061	31,288,396
Vitamins & medicine	8,707,722	7,484,633	6,118,777	5,141,298	4,858,057
Dyeing & colours	14,320,549	14,873,806	12,495,881	11,611,042	11,018,921
Essential oils & perfume	4,286,867	4,220,213	3,624,122	2,977,212	2,414,011

Notes:
1. Foodstuffs include finished products as well as ingredients.
2. Chemicals includes all products not just those used by the food and beverage processing industry.

Source: Customs Dept, Royal Thai Government

Singapore - Trends in Key Import Categories (In S$ '000) (Current Forex Rate - S$ 1.65: US$ 1.00)					
A. Foodstuffs (Note 1)	**1997**	**1996**	**1995**	**1994**	**1993**
Meat and meat preparations	403.404	417,068	391,717	403,973	364,649
Dairy products	498,603	484,964	489,037	416,608	441,433
Fish and seafood	925,511	900,823	929,295	933,829	901,751
Cereals and their products	587,754	572,788	522,525	518,787	513,182
Vegetables and fruits	1,161,446	1,221,713	1,223,383	1,224,210	1,278,716
Sugar and its products	237,532	244,281	219,966	227,556	202,709
Coffee, tea and spices	613,207	495,265	602,897	704,357	533,234
Oil seeds	82,658	92,390	118,334	138,134	130,884
B. Chemicals (Note 2)					
Alcohols	446,139	340,409	421,577	309,654	219,471
Carboxylic acids	508,409	411,321	523,232	375,884	378,890
Nitrogen function compounds	455,396	453,453	405,405	280,281	279,168
Inorganic chemicals	307,293	306,891	289,436	235,743	259,171
Essential oils and extracts	129,050	127,916	130,235	98,890	84,839

Notes:
1. Foodstuffs include finished products as well as ingredients.
2. Chemicals includes all products not just those used by the food and beverage processing industry.
Source: Singapore Trade Statistics

Malaysia Summary of Imports in Ringgit '000 **(Current rate: RM 3.80: US$ 1.00)**					
A. Foodstuffs (Note 1)	**1997**	**1996**	**1995**	**1994**	**1993**
Meat and poultry	554,163	463608	381125	339,715	283,564
Fish and seafood	916,054	834270	773,113	760,938	655,328
Dairy products	993,366	982794	951924	726,515	715,115
Fruits and vegetables	1,374,374	1,269,918	1,127,771	760,938	859,037
Tea, coffee, cocoa and spices	506,123	383290	408804	275,148	201,471
Cereals and their products	2,651,276	2,525,543	2,044,237	1,648,893	1,516,442
Edible oils and fats	551,550	433,464	415,855	532,407	383,256
Sugar and its products	981,064	874745	854832	733,455	608,307
Other edible products	899,276	774,013	620,341	555,719	442,496
B. Chemicals (Note 2)					
Organic chemicals	3,359,416	2,676,995	3,085,576	1,741,486	1,447,145
Inorganic chemicals	1,657,545	1,484,664	1,367,851	1,083,978	854,336
Dyeing, tanning & colours	1,018,240	954,707	916,331	834,045	654,355
Vitamins and medicines	1,033,134	838,092	798,598	711,020	1,343,997

Notes:
1. Foodstuffs include finished products as well as ingredients
2. Chemicals all products not just those used by food and beverage manufacturers.

Source: Malaysian Trade Statistics

Philippines Trends in Key Import Groups by Tonnes					
A. Foodstuffs (Note 1)	**1997**	**1996**	**1995**	**1994**	**1993**
Meat and meat preparations	93,869	71,454	52,121	43,408	20,410
Dairy products	259,033	218,769	237,604	218,018	170,916
Fish and seafood	175,122	173,431	144,691	128,735	122,397
Cereals and cereal preparations	3,654,736	3,367,940	2,779,407	2,376,728	2,180,805
Fruits and vegetables	337,473	276,428	209,291	216,168	142,998
Sugar and sugar preparations	145,444	908,991	477,765	78,248	47,975
Tea, coffee, cocoa and spices	38,935	30,549	29,744	25,001	22,163
Other edible products	82,275	79,363	73,862	61,942	39,880
Oil seeds	168,210	200,598	130,866	179,549	95,861
Crude vegetable materials	8,647	6,863	6,041	8,306	5,849
Fixed vegetable oils and fats	49,589	51,596	22,948	39,502	23,158
B. Chemicals (Note 2)					
Alcohols	105,443	94,951	85,302	102,511	102,154
Carboxylic acids	79,738	83,181	97,106	98,997	94,021
Nitrogen function compounds	34,971	30,857	28,968	23,179	23,315
Inorganic chemicals	979,136	903,600	837,006	517,475	723,386

Notes:
1. Foodstuffs include finished products as well as ingredients
2. Chemicals includes all products not just those used by food and beverage manufacturers.

Source: Foreign Trade Statistics of the Philippines

Indonesia Trends in Key Import Groups by Tonnes					
A. Foodstuffs (Note 1)	**1997**	**1996**	**1995**	**1994**	**1993**
Meat and meat preparations	34,067	40,431	22,739	15,810	10,856
Dairy products	84,375	91,118	113,534	76,618	68,412
Fish and seafood	17,426	15,169	13,400	13,017	10,930
Cereals and cereal preparations	5,240,471	6,993,457	7,262,984	5,317,391	3,141,376
Fruits and vegetables	420,290	340,167	366,043	326,701	195,514
Sugar and sugar preparations	1,305,823	1,313,249	613,585	153,403	250,215
Tea, coffee and spices	29,117	11,502	10,049	13,610	17,001
Cocoa and cocoa preparations	6,411	4,262	3,590	2,907	1,701
Other edible products	25,347	25,043	25,976	23,322	17,128
Oil seeds	804,378	932,167	771,012	970,278	887,778
B. Chemicals (Note 2)					
Inorganic chemicals	1,690,141	1,667,397	1,916,472	1,833,151	1,426,656
Organic chemicals	2,829,873	2,437,638	2,323,439	1,955,538	1,694,641
Tanning, dyeing and colours	210,873	179,420	178,841	155,503	128,680
Essential oils	37,279	16,315	31,307	16,002	12,429

Notes:
1. Foodstuffs include finished products as well as ingredients
2. Chemicals includes all products not just those used by food and beverage manufacturers.

Source: Indonesia Foreign Trade Statistics

Appendix B

Singapore - Trends in Key Re-Exports by Category (In S$ '000) (Current Forex Rate - S$ 1.65: US$ 1.00)					
A. Foodstuffs (Note 1)	**1997**	**1996**	**1995**	**1994**	**1993**
Meat and meat preparations	31,828	38,820	45,267	63,154	58,642
Dairy products	65,058	75,683	74,475	80,212	87,518
Fish and seafood	464,192	489,394	564,244	548,924	477,946
Cereals and their products	78,967	94,440	101,549	88,538	72,938
Vegetables and fruits	470,965	533,856	543,042	516,248	422,828
Sugar and its products	40,598	37,228	37,130	39,873	37,824
Coffee, tea and spices	657,690	498,206	781,398	811,073	496,867
Oil seeds	42,187	45,012	62,453	62,172	59,020
B. Chemicals (Note 2)					
Alcohols	174,028	143,394	195,260	156,326	115,592
Carboxylic acids	266,047	250,206	306,306	217,151	191,216
Nitrogen function compounds	297,876	304,883	273,561	192,992	191,269
Inorganic chemicals	130,957	158,866	153,714	164,461	83,190
Essential oils and extracts	36,931	30,362	31,428	28,602	24,624

Notes:
1. Foodstuffs include finished products as well as ingredients.
2. Chemicals includes all products not just those used by the food and beverage processing industry.
Source: Singapore Trade Statistics

Appendix C

Key Food Manufacturers in Indonesia - Address List

PT Aneka Bina Cipta Central Food Industry (ABC),
Jalan Daan Mogot Km. 12,
Jakarta Barat, DKI Jakarta,
Indonesia
Tel: (62 21) 619 1612
Fax: (62 21) 619 5126
Produces: Sauces and beverages.

PT Ceres Group of Companies
Jalan Dayeuh Kolot No 84,
Bandung,
West Java,
Indonesia
Tel: (62 22) 507421
Fax: (62 21) 507291
Produces: Chocolate and cocoa products.
This group comprises factories which operate at different locations under the names of:
PT Ceres
PT General Food Industries Ltd
PT Fajar Mataram Sedayu
PT Frey Abadi Indonesia

PT Cipta Rasa Primatama (Cadbury),
Pulo Gadung Industrial Estate,
Jalan Pulo Gadung No 20,
Jakarta Timur,
DKI Jakarta,
Indonesia
Tel: (62 21) 460 2229
Fax: (62 21) 460 9058
Produces: Chocolate confectionery.

PT Danone Indonesia
Menara Duta Building,
6th Floor,
Jalan HR. Rasuna Said Kav. B-9,
Jakarta Selantan
Indonesia
Tel: (62 21) 520 7811
Fax: (62 21) 520 7967
Produces: Biscuits

PT Diamond Cold Storage
Jalan Pasir Putih Kav. 1,
Ancol Timur,
Jakarta 14430, DKI Jakarta,
Indonesia
Tel: (62 21) 640 5678
Fax: (62 21) 640 2861
Produces: Ice cream and beverages.

PT Foremost Indonesia
Jalan Raya Jakarta-Bogor Km. 26,
Jakarta Timur, DKI Jakarta,
Indonesia
Tel: (62 21) 871 0511
Fax: (62 21) 871 0515
Produces: Dairy products.

PT Helios Arnotts Indonesia
Helios Building,
Jalan Pulolentut Kav 10,
Pulogandung Industrial Estate,
Jakarta Timur,
Indonesia
Tel: (62 21) 460 4045
Fax: (62 21) 460 9236
Produces: Biscuits

PT Indo Cocoa Specialities
Jalan Tj Morawa - Mg Manurung,
Km 9.2,
Medan,
North Sumatra,
Indonesia
Tel: (62 61) 767304
Fax: (62 61) 766535
Produces: Chocolate confectionery.

PT Indofood Sukses Makmur
Ariobimo Central Building, 12th Flr,
Jalan H.R. Rasuna Said X-2, Kav. 5,
Jakarta 12950
Indonesia
Tel: (62 21) 522 8822
Fax: (62 21) 522 6014
Produces: Cereal based processed foods including instant noodles.

Khong Guan Group of Companies
Head Office,
Jalan Kebon Sirih 88,
Jakarta Pusat,
DKI Jakarta 10110,
Indonesia
Tel: (62 21) 380 6966
Fax: (62 21) 384 5024
Produces: Biscuits.
This group comprises factories which operate at different locations under the names of:
PT Khong Guan Indonesia.
PT Monde Biscuit Factory.
PT Nissin Biscuit Indonesia.

PT Konimex Pharmaceutical Laboratory Industries (Sobisco),
Desa Sanggrahan
Kecamatan Grogol,
Sukoharjo 57552
Indonesia
Tel: (62 271) 716246 / 716247
Fax: (62 271) 716247
Produces: Biscuits

PT Lotte Indonesia
MM 2100 Industrial Town,
Jalan Block E3, Cibitang,
Bekasi 17520
West Java,
Indonesia
Tel: (62 21) 898 0029
Fax: (62 21) 871 8751
Produces: Confectionery

PT Margreta Sweeta Varia
Jalan Jatinegara Barat 124,
Jakarta 13320
Indonesia
Tel: (62 21) 856 4454
Fax: (62 21) 854 4438
Produces: Confectionery

PT Marizasari Sarimurni
Kompleks Kota Grogol Permai,
Blok A 25,
Jalan Prof. Dr Latumenten,
Jakarta Barat,
Indonesia
Tel: (62 21) 560 0632 or 566 1635
Fax: (62 21 566 1356
Activity: Cake manufacturer

PT Mayora Indah Group
Head Office,
Mayora Building,
Jalan Tomang Raya No 21-23,
Jakarta 11440
Indonesia
Tel: (62 21) 565 5302
Fax: (62 21) 565 5323
Produces: Confectionery
This group includes:
PT Mayora Indah
PT Kakao Mas Gemilang

PT Miwon Indonesia
Mulia Tower 20th Floor,
Jalan Jenderal Gatot Subroto,
Kav. 9-11,
Jakarta 12930, DKI Jakarta
Indonesia
Tel: (62 21) 521 0150
Fax: (62 21) 521 0151
Produces: Food seasonings.

PT Multi Bintang Indonesia
Jalan Daan Mogot Km 19,
Tangerang 15124
West Java,
Indonesia
Tel: (62 21) 619 0108
Fax: (62 21) 619 0190
Produces: Beer and soft drinks.

PT Multi Rasa Agung
Nestlé Confectionery,
Wisma Metropolitan II
7th Floor,
Jalan Jenderal Sudirman Kav 31,
Jakarta 12910
Indonesia
Tel: (62 21) 570 3753
Fax: (62 21) 570 3753
Produces: Confectionery

PT Nabisco Foods
c/o PT Rodamas Company,
Jalan Letjen S. Parman No 32-34,
Jakarta Barat,
DKI Jakarta
Tel: (62 21) 560 1560
Fax: (62 21) 548 2520
Produces: Biscuits

PT Nestlé Indonesia
Wisma Metropolitan II, 7th Floor,
Jalan Jenderal Sudirman Kav. 31,
Jakarta Selatan, DKI Jakarta,
Indonesia
Tel: (62 21) 570 3753
Fax: (62 21) 571 1827
Produces: Nestlé brands of processed foods.

PT Nutricia Indonesia Sejahtera
Jalan Raya Jakarta-Bogor Km 26.6,
Jakarta Timur, DKI Jakarta,
Indonesia
Tel: (62 21) 871 1178
Fax: (62 21) 871 1176
Produces: Infant foods

PT Nutrifood Indonesia
Kawasan Industri Pulogadung,
Jalan Rawabali II NO 3,
Pulogadung,
Jakarta Timur, DKI Jakarta
Indonesia
Tel: (62 21) 460 5780
Fax: (62 21) 460 5784
Produces: Diet foods.

PT Prambanan Kencana Ltd,
Delta Building A/28-29,
Jl. Suryopranoto 1-9,
Jakarta 10130,
Indonesia
Tel: (62 21) 380 6464
Fax: (62 21) 384 3281
Activity: Bakery supplies

Pondan Foods (PT Wijaya Putra)
Jatake Industrial Area.
Jl. Industri VII, Blok M/12,
Desa Pasir Jaya,
Tangerang,
Indonesia
Tel: (62 21) 669 7673
Fax: (62 21) 661 7713
Activity: Cake mix producer

PT Salim Graha Food & Beverage Industry
Jalan Raya Bekasi Km 27 & 28,
Pondok Ungu,
Bekasi, West Java,
Indonesia
Tel: (62 21) 460 3431
Fax: (62 21) 884 2935
Produces: Canned foods.

PT Sari Husada
Jalan Kesuma Negara No. 37,
Yogyakarta, DI Yogyakarta,
Java,
Indonesia
Tel: (62 274) 512 990
Fax: (62 274) 563 328
Produces: Infant foods.

PT Suba Indah
Jalan Raya Jakarta-Bogor Km. 31,
Desa Mekar Sari,
Cimangis, Bogor,
West Java,
Indonesia
Tel: (62 21) 871 0303
Fax: (62 21) 871 1391
Produces: Beverages and various processed foods.

PT Super World Wide Foodstuffs Industries
Jalan Raya Serang Km 6.5,
Jateke, Jatiuwang,
Tangerang 15136
West Java,
Indonesia
Tel: (62 21) 552 3202
Fax: (62 21) 552 4206
Produces: Confectionery

PT Torabika Eka Semesta
Jalan Daan Mogot Km. 18
Tangerang,
West Java,
Indonesia
Tel: (62 21) 619 4403
Fax: (62 21) 569 0035
Produces: Processed coffee.

PT Trebor Indonesia (Cadbury)
Jalan Raya Pasar Minggu Km 18.5
Jakarta 12510
Indonesia
Tel: (62 21) 789 9983
Fax: (62 21) 799 4283 or 797 2903
Produces: Confectionery

PT Ubindo Aneka Biscuit
Wisma Ariobimo, 7th Floor,
Jalan HR Rasuna Said X-2 Kav 5,
Jakarta 12950
Indonesia
Tel: (62 21) 522 8822
Fax: (62 21) 522 6024
Produces: Biscuits

PT Unilever Indonesia
Graha Unilever Building,
Jalan Jend. Gatot Subroto Kav 15,
Jakarta 12390,
Indonesia
Tel: (62 21) 526 2112
Fax: (62 21) 526 2044
Activity: Unilever branded foods

PT Union Confectionery Ltd
Jalan Medan Belawan Km 10.5,
Medan 20242
North Sumatra,
Indonesia
Tel: (62 61) 611310 or 612859
Fax: (62 61) 611070 or 651070
Produces: Confectionery

PT Van Melle Indonesia
Jalan Raya Jakarta-Bogor Km 47.4,
Bogor,
West Java,
Indonesia
Tel: (62 21) 875 4265
Fax: (62 21) 312611 or 311323
Produces: Confectionery

PT Yakult Indonesia Persada,
Wisma Unggul Indah Corporation,
Jalan Gatot Sabroto Kav. 6-7,
Jakarta 12930, DKI Jakarta
Indonesia
Tel: (62 21) 520 2030
Fax: (62 21) 520 0830
Produces: Cultured dairy beverages.
Source: PT Corinthian Infopharma Corp.

Key Malaysian Food & Beverage Manufacturers
Address List

A. Clouet & Co (K.L.) Sdn Bhd
Lot 11 Persiaran Sabak Bernam,
Hicom Industries Area,
Sector B Section 26
40000 Shah Alam,
Selangor
Malaysia
Tel: (603) 511 1069
Fax: (603) 511 1988
Products: Canned foods.

Ace Canning Corporation Sdn Bhd
Lot 5, Jalan 205,
P.O. Box 8,
46050 Petaling Jaya, Selangor,
Malaysia
Tel : (603) 791 2755
Fax : (603) 791 1328
Products : Canned foods and beverages.

Amoy Canning Sdn Bhd
Jalan Klang 7 Km,
58000 Kuala Lumpur,
Malaysia
Tel: (603) 872 8011
Fax: (603) 781 3492
Products: Canned foods and beverages.

Britannia Brands (Malaysia) Sdn Bhd
(Groupe Danone)
126A Jalan Skudai,
81200 Tampoi, Johor Bahru.
Johor, Malaysia
Tel : 607 237 5545
Fax : 607 236 7094
Products : Biscuits and snacks

Cadbury Confectionery (M) Sdn Bhd
P.O. Box 7043,
40700 Shah Alam, Selangor,
Malaysia
Tel : (603) 559 1192
Fax (603) 559 0959
Products : Chocolate & related products

Carlsberg Brewery Malaysia Berhad
55 Persiaran Selangor,
Section 15,
40000 Shah Alam,
Selangor,
Malaysia
Tel: (603) 559 1621
Fax: (603) 559 4369
Products: Beer

Central Sugars Refinery Sdn Bhd
Batu Tiga,
40000 Shah Alam, Selangor,
Malaysia
Tel: (603) 559 1414
Fax: (603) 558 8792
Products: Refined sugar.

Chocolate Products (Malaysia) Bhd
Manufacturing Unit
P.O. Box 61,
12700 Butterworth,
Penang,
Malaysia
Tel : (604) 333 7711
Fax : (604) 331 7639
Products : Chocolates & confectionery

Cheong Chan (Hup Kee) / Campbell Soups S.E.A.
P.O. Box 51,
46700 Petaling Jaya, Selangor,
Malaysia
Tel: (603) 791 3486
Fax: (603) 791 7023
Products: Sauces and canned foods.

Cold Storage (Malaysia) Berhad
Cold Storage Food Manufacturing Division
c/o Menara Cold Storage, 10th Floor,
Jaya Shopping Centre,
Jalan Semangat,
46100 Petaling Jaya, Selangor
Malaysia
Tel: (603) 758 8988
Fax: (603) 758 1291
Products: Chilled foods.

CPC / AJI (Malaysia) Sdn Bhd
Lot 1989 Block C,
Jalan Segambut,
51200 Kuala Lumpur
Malaysia
Tel: (603) 626 4233
Fax: (603) 621 1855
Products: CPC branded grocery items.

Dewina Food Industries Sdn Bhd
Suite 9.2, 9th Floor,
Menara Aik Hua Cangkat,
Jalan Raja Chulan,
50200 Kuala Lumpur,
Malaysia
Tel: (603) 825 6351
Fax: (603) 825 6352
Products: Traditional foods and sauces.

Dumex (Malaysia) Sdn Bhd
1 Jalan 205,
46050 Petaling Jaya, Selangor,
Malaysia
Tel : (603) 791 3322
Fax : (603) 791 3561
Products : Infant formula and milk powders

Dutch Baby Milk Industries (Malaya) Bhd
13 Jalan Semangat,
46200 Petaling Jaya, Selangor,
Malaysia
Tel : (603) 756 7477
Fax : (603) 755 2985
Products : Milk and related products

East Coast Bottling Sdn Bhd
P.O. Box 251,
25730 Kuantan,
Pahang,
Malaysia
Tel: (609) 566 1005
Fax: (609) 566 5303
Products: Soft drinks

Federal Flour Mills Berhad
16th Floor, Wisma Jerneh,
38 Jalan Sultan Ismail,
50250 Kuala Lumpur,
Malaysia
Tel: (603) 242 4077
Fax: (603) 241 4059
Products: Flour and edible oils.

Fraser & Neave (Malaya) Sdn Bhd
95 Jalan Yew,
Off Jalan Sungei Besi,
55100 Kuala Lumpur,
Malaysia
Tel: (603) 221 1077
Fax: (603) 221 1226
Products: Soft drinks (Coca-Cola) and ice cream.

Gan United Cannery Sdn Bhd
35/35A&B Jalan Persisiran Perling,
Taman Perling,
81200 Johor Baru,
State of Johor
Malaysia
Tel: (607) 236 0496
Fax: (607) 236 0503
Produces: Canned foods, spreads and sauces.

Guinness Anchor Bhd
Sungei Way Brewery,
P.O. Box 144,
46710 Petaling Jaya,
Selangor, Malaysia
Tel: (603) 776 3022
Fax: (603) 774 0986
Products: Beer

Hudson Malaysia Sdn Bhd
Lot 14 Jalan 225,
46100 Petaling Jaya, Selangor,
Malaysia
Tel: (603) 755 4144
Fax: (603) 756 2359
Products: Sugar confectionery.

Hwa Tai Food Industries Berhad
12 Jalan Jorak,
Kawasan Perindustrian Tongkang Pecah,
83010 Batu Pahat,
Johor Darul Taksim,
Malaysia
Tel : (607) 415 1685
Fax : (607) 415 1135
Products : Biscuits

Kart Food Industries Sdn Bhd
Lot 11, Jalan Bawang Putih 24/34,
Seksyen 24,
40300 Shah Alam, Selangor,
Malaysia
Tel: (603) 541 4199
Fax: (603) 541 7948
Products: Frozen traditional foods.

Keebler Company (Malaysia) Sdn Bhd
2019-2020 Kawasan MIEL,
Prai Industrial Estate (Phase Tiga),
13600 Prai,
Penang, Malaysia
Tel : (604) 390 7699
Fax : (604) 390 8202
Products : Snacks

Khong Guan Biscuit Factory (Johor) S/B
PLO 16, Senai Industrial Estate,
81400 Senai,
Johor Darul Takzim,
Malaysia
Tel : (607) 599 1320
Fax : (607) 599 2991
Products : Biscuits

Lam Soon (M) Berhad
P.O. Box 8, Petaling Jaya,
Selangor Darul Ehsan,
Malaysia
Tel : (603) 791 2755
Fax : (603) 791 2572
Products : Edible oils and their products.

Mac Food Services (M) Sdn Bhd
7 Jalan SS 13/5,
Subang Jaya,
Selangor Darul Ehsan,
Malaysia
Tel: (603) 733 0222
Fax: (603) 734 0189
Products: Processed meats, poultry and fish for food service businesses.

Malayan Flour Mills Berhad
Head Office
Wisma MCA, 10th Floor,
Jalan Ampang,
50450 Kuala Lumpur,
Malaysia
Tel: (603) 261 9055
Fax: (603) 261 0502
Products: Wheat flour and its allied products.

Malayan Sugar Manufacturing Company Berhad
Head Office
18th Floor, Wisma Jerneh,
Jalan Sultan Ismail,
50250 Kuala Lumpur,
Malaysia
Tel: (603) 242 4388
Fax: (603) 242 1677
Products: Refined sugar.

Mamee Food Factory Sdn Bhd
Lot 13, Air Keroh Industrial Area,
75450 Air Keroh,
Melaka State,
Malaysia
Tel : (606) 232 4341
Fax : (606) 232 7486
Products : Snack foods

Myojo (Malaysia) Sdn Bhd
3rd Floor Bangunan Universal
44 Jalan Penchala,
46050 Petaling Jaya,
Selangor,
Malaysia
Tel : (603) 791 0480
Fax : (603) 791 0485
Products: Noodles.

Nestlé Malaysia Berhad
Nestlé House, 4 Lorong Pesiaran Barat,
P.O. Box 385 Jalan Sultan,
46918 Petaling Jaya, Selangor,
Malaysia
Tel : (603) 755 4466
Fax : (603) 755 0992
Operating units : Nestlé Products Sdn Bhd, Nestlé ASEAN, Nestlé Foodservice and Nestlé Cold Storage Sdn Bhd
Products : Nestlé range, including milk and related products, chocolate and ice cream

Perfect Food Industries Berhad
AG 6876, Alor Gajah Industrial Estate,
78000 Alor Gajah,
Melaka
Malaysia
Tel : (606) 556 1401
Fax : (606) 556 5746
Products : Biscuits

Permanis Sdn Bhd
Lot 5 & 7, Jalan P5 & P6,
Seksyen 13,
Kawasan Perusahaan Bandar Baru Bangi,
43650 Kajang,
Selangor,
Malaysia
Tel: (603) 825 6240
Fax: (603) 825 7642
Products: Soft drinks (Pepsi)

Prima Agri-Products Sdn Bhd
No 16 & 18, Jalan P/13
43650 Bandar Baru Bangi,
Selangor
Malaysia
Tel: (603) 825 9224
Fax: (603) 825 9784
Products: Halal processed meats and poultry.

Rasamewa Ice Cream Manufacturer Sdn Bhd
27 Jalan Asa 8, Kawasan Perindustrian Ringan,
Taman Asa Jaya,
43000 Kajang, Selangor,
Malaysia
Tel: (603) 836 2877
Fax: (603) 836 8052
Products: Ice cream.

Rex Canning Co., Sdn Bhd
5099 Mak Mandin,
13400 Butterworth,
Penang
Malaysia
Tel: (604) 332 5979
Fax: (603) 319 5666
Products: Canned foods.

Solid Side Food Industries Sdn Bhd
38 Jalan Lima, Off Jalan Chan Sow Lin,
55200 Kuala Lumpur,
Malaysia
Tel: (603) 222 8262
Fax: (603) 222 3940
Products: All forms of processed meats and poultry.

Unilever (Malaysia) Sdn Bhd
(& Wall's Ice Cream Division)
P.O. Box 11015,
50990 Kuala Lumpur
Malaysia
Tel : (603) 282 1143
Fax : (603) 282 2617
Products : Ice cream and edible oil products.

Vit Makanan (K.L.) Sdn Bhd

Lot 17493, Taman Selayang
8E Miles, Jalan Ipoh,
68100 Batu Caves,
Selangor, Malaysia
Tel : (603) 618 5566, 618 5669
Fax : (603) 618 5762
Produces: Noodles.

Yee Lee Corporation Berhad
Lot 85 Jalan Portland,
Tasek Industrial Estate,
31400 Ipoh,
Perak,
Malaysia
Tel: (605) 545 1055
Fax: (605) 547 3962
Products: Edible oils and their products.

Yeo Hiap Seng (Malaysia) Berhad
7 Jalan Tanding,
46050 Petaling Jaya, Selangor,
Malaysia
Tel : 603-791 3733
Fax : 603-791 3509
Products : Beverages and canned foods.

Upali (M) Sdn Bhd
Persiaran Raja Muda
40917 Shah Alam, Selangor,
Malaysia
Tel : (603) 559 2606
Fax (603) 559 5772
Products : Chocolate and its products

Source: Asia Medialine (M) Sdn Bhd

Key Philippines Food Manufacturers
Address List

Alaska Milk Corporation
6/F Corinthian Plaza
121 Paseo de Roxas, Makati City,
Metro Manila,
Philippines
Tel: (632) 819 5451 to 76
Fax No: (632) 819 5477
Business activities: Dairy products, especially milk.

Bristol-Myers Squibb (Phil.), Inc.
2309 Pasong Tamo Ext.,
Makati,
Metro Manila,
Philippines
Tel: (632) 816 6151 / 816 7748
Business activities: Nutritional products, infant formula and pharmaceuticals.

California Manufacturing Co., Inc.
Km. 18 East Service Road, South Superhighway,
1700 Paranaque,
Metro Manila,
Philippines
Tel: (632) 823 8021 to 26
Fax: (632) 823 8676
Business activities: Manufacture of pasta, salad cream, sandwich spreads, pickles, canned meat, preserves and peanut butter.

Cargill Philippines Inc
14th Floor, Citibank Tower,
Paseo de Roxas,
Makati City
Metro Manila,
Philippines
Tel: (632) 815 8801
Fax: Not stated
Business activities: Edible oils and related activities.

Century Canning Corporation
32 Arturo Drive,
Bagumbayan, Taguig,
Metro Manila
Philippines
Tel: (632) 823 8040
Business activities: Canned fish and marine products.

CFC Corporation
CFC Administration Building,
E. Rodrigues Jr. Avenue,
Bagong Ilog,
Pasig City
Philippines
Tel: (632) 673 7541
Fax: Not stated
Business activities: Ice cream and milk products.

Coca-Cola Bottlers Phils., Inc.
7 Floor, Feliza Building,
Herrara Street, Legaspi Village,
Makati City,
Metro Manila,
Philippines
Tel: (632) 818 6679
Fax: Not stated
Business activities: Manufacturer of Coca-Cola branded beverages.

Commonwealth Foods Inc.
5/F Comfoods Bldg., Sen Gil J. Puyat Ave.,
1200 Makati City,
Metro Manila,
Philippines
Tel: (632) 844 5661
Fax: (632) 817 8845
Business activities: Coffee roasting and processing and manufacture of biscuits, cocoa and chocolate products.

Del Monte Philippines Inc.
Citibank Tower,
8741 Pasao de Roxas,
Makati City,
Metro Manila
Philippines
Tel: (632) 810 7501
Fax: Not listed
Business activities: Fruit processing.

General Milling Corp.
6/F Corinthian Plaza Bldg.,
121 Paseo De Roxas,
Makati,
Metro Manila
Philippines
Tel: (632) 655 7383
Fax: (632) 819 5477
Business activities: Manufacturing, processing, milling of flour and food products

Golden Donuts Inc.
GDI Building,
Sheridan cor. Reliance Streets,
Mandaluyong City,
Metro Manila
Philippines
Tel: (632) 636 0550
Fax: Not stated
Business activities: Daily baked products.

Goldilocks Bakeshop Inc.
439 Shaw Boulevard,
Mandaluyong City,
Metro Manila,
Philippines
Tel: (632) 532 4050
Fax: Not stated
Business activities: Daily baked products.

Goya, Inc.
23M Tuazon St., Parang,
1800 Marikina City,
Metro Manila,
Philippines
Tel: (632) 941 5828
Fax: (632) 816 7087 / 947 8965
Business activities: Manufacture of cocoa products, chocolates, candies and other confectionery.

Honai Food Corp.
20-A General Luis St.,
Bo. Kaibiga,
Caloocan City,
Metro Manila
Philippines
Telephone/Fax: (632) 939 5062
Business activities: Snack food producer

Kraft Foods (Philippines), Inc
8378 Dr A. Santos Ave.,
1700 Paranaque,
Metro Manila 2186
Tel: (632) 826 5546
Fax: (632) 824 5385
Business activities: Cheese, salad dressings, powdered beverages and bakery products.

Liberty Flour Mills Inc.
Liberty Building, Pasay Road,
Makati City,
Metro Manila
Philippines
Tel: (632) 892 5011
Fax: (632) 893 2644
Business activities: Flour milling and processed meat manufacture.

Monde Denmark Nissin Biscuit Corp.
23 Floor, Office Tower at 6750 Ayala Avenue,
Makati City,
Metro Manila,
Philippines
Tel: (632) 810 3550
Fax: Not stated
Business activities: Manufacture of cookies.

M. Y. San Biscuits, Inc.

534 Grecia St., Bo. Sto. Domingo,
Cainta, Rizal,
Philippines
Tel: (632) 655 0809
Fax: (632) 655 0808
Business activities: Manufacturer of biscuits, cookies and similar dry bakery products.

Nautica Canning Corp.
2602-A, PSE Center,
Exchange Road, Ortigas Center,
Pasig City,
Metro Manila,
Philippines
Tel: (632) 631 8584
Fax: (632) 631 8587

Nestlé Philippines Inc.
335 Sen Gil J. Puyat Ave.,
Makati,
Metro Manila
Philippines
Tel: (632) 898 0001
Fax: (632) 898 0022 / 898 0034
Business activities: Manufacture and distributor of Nestlé branded processed foods and beverages.

Novartis Nutrition (Phils.) Inc.
105E. Rodriguez Jr. Ave.,
1604 Pasig City,
Metro Manila
Philippines
Tel: (632) 671 2845/671 2840
Fax: (632) 671 2844
Business activities: Manufacture of Ovaltine branded chocolate powder drinks and chocolate confectionery.

Nutritive Snack Food Corp.
58 Gen. Luis St., Novaliches,
Quezon City,
Metro Manila
Philippines
Tel: (632) 938 2061.
Fax: (632) 937 8847
Business activities: Snack food manufacturer.

Philippines Dairy Products Corp.

Km 8, Ulas, Davao City,
Davao Del Sur 8000
Philippines
Tel: (638) 298 0409
Fax: (638) 298 0206
Business activities: Manufacture of butter, cheese and margarine.

Pilmico Foods Corp.
2nd Floor, Ong Kin King Bldg,
Magallanes Corner,
Lapu-Lapu St.,
Cebu City,
Philippines
Tel: (63 32) 253 2678.
Fax: Not stated
Business activities: Manufacture of wheat flour products, baking powder and confectionery items.

Pure Foods Corporation
JMT Corporate Condominium Building
ADB Avenue, Ortigas Center, Pasig City
Metro Manila,
Philippines
Tel: (632) 634 1001 to 49
Fax: (632) 635 2229
Business activities: Processed meats, flour, poultry, livestock, instant noodles, food service and restaurant business.

RFM Corporation
RFM Bldg., Pioneer cor. Sheridan Sts.,
Mandaluyong City,
Metro Manila,
Philippines
Tel: (632) 645 5011/631 8101
Fax: (632) 646 2493
Business activities: Diversified business involved in wheat, meat processing and edible oils.

San Miguel Corporation
40 San Miguel Avenue,
Mandaluyong City,
1550 Metro Manila,
Philippines
Tel: (632) 632 3000
Fax: (632) 632 3099
Business activities: Brewing and other food and beverage manufacturing.

Selecta Dairy Products, Inc.
RFM Bldg., Pioneer cor. Sheridan Sts.,
Mandaluyong City,
Metro Manila,
Philippines
Tel: (632) 645 5011/631 8101
Fax No: (632) 631 5007
Business activities: Manufacturing, selling, importing, exporting, trading and dealing in ice cream, dairy and other food products.

Serg's Products, Inc.
1900 Rizal, Ortigas Avenue Ext.,
Cainta,
Metro Manila,
Philippines
Tel: (632) 655 0154
Fax: (632) 655 0148
Business activities: Manufacturer of chocolates and cocoa products.

Swift Foods Inc.
RFM Building,
Pioneer cor. Sheridan Sts,
Mandaluyong City,
Metro Manila,
Philippines
Tel: (632) 631 8101
Fax No: (632) 631 5064
Business activities: Manufacturing of processed meats and production of broiler chickens.

Universal Robina Corp.
27/F Galleria Corporation Center,
EDSA, cor. Ortigas Avenue,
Quezon City,
Metro Manila
Philippines
Tel: (632) 634 5317 / 634 5276
Fax: (632) 634 5276
Business activities: Diversified business active in the manufacture and marketing of branded consumer foods, livestock and sugar cane farming, edible oil production, sugar refining and flour milling.

Van Melle Phils., Inc.
No 4 Pioneer Street,
Mandaluyong City,
Metro Manila,
Philippines
Tel: (632) 634 7653
Fax: (632) 635 3138
Business activities: Manufacture of sugar confectionery.

Wrigley Philippines Inc.
Pioneer Street,
Pasig City,
Metro Manila
Philippines
Tel: (632) 631 1745
Fax: Not stated
Business activities: Manufacture of chewing gum.

Wyeth Phils., Inc.
2236 Chino Roces Ave.,
Makati City,
Metro Manila
Philippines
Tel: (632) 843 0941
Fax: Not listed
Business activities: Infant nutritional products and pharmaceuticals.

Yakult Philippines, Inc.
1004 Manila, 1851 Dr. A. Vasquez Street,
Metro Manila,
Philippines
Tel: (632) 573 606
Fax: Not stated
Business activities: Cultured dairy drinks.

Source: Philippines Business Profiles & Perspectives Inc

Key Singapore Food and Beverage Manufacturers
Address List

Amoy Canning Corp. (S) Ltd
23 Chin Bee Avenue
Singapore 2261
Tel: (65) 2612311
Fax: (65) 2612800
Produces: Canned foods and beverages.

Asia Dairies Pte Ltd
214/218 Pandan Loop
Singapore 0512
Tel: (65) 7794566
Fax: (65) 7794447
Produces: Dairy products.

Asia Pacific Breweries (Singapore) Pte Ltd
459 Jalan Ahmad Ibrahim,
Singapore 639934
Tel: (65) 861 6200
Fax: (65) 862 1647
Produces: Beer.

Auric Pacific Food Industries Pte Ltd
2 Enterprise Road,
Singapore 629814
Tel: (65) 261 8411 (Gourmet Foods Division)
Fax: (65) 265 0689
Produces: Meat and poultry products.

Australian Fruit Juice (S) Pte Ltd
20 Toa Payoh Industrial Park,
#01-1003/1005,
Singapore 319072
Tel: (65) 253 7712
Fax: (65) 251 9836
Produces: Beverages.

Bachun Food Industries (Pte) Ltd
22 Tuas Avenue 12,
Singapore 639040
Tel: (65) 861 0158
Fax: (65) 861 1451
Produces: Sauces.

Callebaut Asia Pacific (Singapore) Pte Ltd
10 Ang Mo Kio Street 65,
#05-11 Techpoint,
Singapore 569059
Tel: (65) 481 6855
Fax: (65) 481 4155
Produces: Chocolate products for industry and catering business use.

Chinatown Food Corporation Pte Ltd
9 Burn Road, #02-00,
Tee Yih Jia Food Building,
Singapore 369972
Tel: (65) 382 0500
Fax: (65) 382 0600
Produces: Frozen traditional foods.

Delifrance Singapore Pte Ltd
245 Pandan Loop,
Singapore 128428
Tel: (65) 778 7934
Fax: (65) 779 6368
Produces: Baked products for its own caf1 chain.

Dragon Shokuhin (S) Pte Ltd
12 Senoko Avenue
Singapore 758302
Tel: (65) 755 8933
Fax: (65) 753 2964
Produces: Frozen and chilled traditional foods.

Everbloom Mushroom Pte Ltd
9 Seletar West Farmway 5,
Singapore 798057
Tel: (65) 482 1070
Fax: (65) 482 1657
Produces: Mushrooms and mushroom based products.

Fortune Food Manufacturing Pte Ltd

348 Jalan Boon Lay,
Singapore 619529
Tel: (65) 2664188
Fax: (65) 2611326
Produces: Soybean products.

F&N Coca-Cola Pte Ltd
457 Jalan Ahmad Ibrahim,
Singapore 639933
Tel: (65) 8604224
Fax: (65) 8617248
Produces: Soft drinks

Gardenia Foods (S) Pte Ltd
224 Pandan Loop
Singapore 0512
Tel: (65) 778 5666
Fax: (65) 777 9453
Produces: Daily baked products.

Golden Bridge Foods Manufacturing Pte Ltd
30 Senoko South Road,
Singapore
Tel: (65) 758 3761
Fax: (65) 758 8580
Produces: Asian meat and poultry products.

Haton Food Industries Pte Ltd
59 Quality Road,
Singapore 6188
Tel: (65) 265 5111
Fax: (65) 268 2882
Produces: Frozen fish and seafood products.

Khong Guan Biscuit Factory (S) Pte Ltd
338 Jalan Boon Lay
Singapore 619526
Tel: (65) 261 6888
Fax: (65) 265 2319
Produces: Biscuits.

Kikkoman (S) Pte Ltd
7 Senoko Crescent
Singapore 2775
Tel: (65) 758 8822
Fax: (65) 758 3016
Produces: Sauces.

King's Creameries (S) Pte Ltd
51 Quality Road,
Singapore 618813
Tel: (65) 261 3133
Fax: (65) 265 5325
Produces: Ice cream.

Malaysia Dairy Industry Pte Ltd
2 Davidson Road
Singapore 369941
Tel: (65) 288 6421
Fax: (65) 288 8634
Produces: Dairy products and beverages.

Nestlé ASEAN (Singapore)
c/o Nestlé Singapore Head Office
200 Cantonment Road,
Southpoint, #03-01
Singapore 089763
Tel: (65) 221 5522
Fax: (65) 224 0402
Produces: Soysauce powder ingredient.

Ngo Chew Hong Edible Oil Pte Ltd
231 Pandan Loop,
Singapore 128418
Tel: (65) 778 3322
Fax: (65) 775 1566 (Production Department)
Produces: Edible oils.

Orkla Asia Pte Ltd
Head Office
400 Orchard Road, #10-04
Singapore
Tel: (65) 737 0837
Fax: (65) 737 8996
Produces: Frozen foods.

Pokka Corporation (S) Limited
39 Quality Road,
Singapore 618810
Tel: (65) 261 1222
Fax: (65) 268 1975
Produces: Beverages and desserts.

Prima Ltd
201 Keppel Road
Singapore 0409
Tel: (65) 272 8811
Fax: (65) 276 6623
Produces: Flour and bakery supplies.

Seawaves Frozen Food Pte Ltd
12 Fishery Port Road,
Singapore
Tel: (65) 265 8883
Fax: (65) 268 1368
Produces: Frozen fish and seafood products.

Sime Darby Edible Products Ltd
255 Jalan Boon Lay,
Jurong Town
Singapore 619524
Tel: (65) 660 4240
Fax: (65) 265 5129
Produces: Edible oils.

Singapore Food Industries Pte Ltd
234 Pandan Loop,
Jurong,
Singapore 128422
Tel: (65) 778 4466
Fax: 778 4238
Produces: Meat and poultry products.

Sinsin Food Industries Pte Ltd
12/14 Chin Bee Avenue
Singapore 619937
Tel: (65) 2641122
Fax: (65) 2658558
Produces: Sauces.

Sin Sin Jam Manufacturing Pte Ltd

3 Irving Place,
Singapore
Tel: (65) 282 6752
Fax: (65) 285 0351
Produces: Jams/jellies.

SIS '88 Pte Ltd
34 Jurong Port Road,
Singapore 2261
Tel: (65) 265 2288
Fax: (65) 265 7460
Produces: Refined sugar.

Sunshine Bakeries
2 Senoko Avenue,
Singapore 758398
Tel: (65) 2578455
Fax: (65) 2577310
Produces: Daily baked products.

Super Coffemix Manufacturing Limited
26 Senoko Way,
Singapore 758048
Tel: (65) 753 3088
Fax: (65) 753 7833
Produces: Beverage powders and cereal based foods.

Tai Hua Food Industries Pte Ltd
12 Jalan Besut,
Singapore
Tel: (65) 265 9911
Fax: (65) 265 4077
Produces: Sauces.

Tai Sun (Lim Kee) Food Industries Pte Ltd
255 Pandan Loop,
Singapore 128433
Tel: (65) 779 6611
Fax: (65) 778 2477
Produces: Snack foods.

Tat Hui Foods Pte Ltd
37 Quality Road,
Singapore 618808
Tel: (65) 261 1010
Fax: (65) 265 1929
Produces: Noodles.

Tee Yih Jia Food Manufacturing Pte Ltd
5 Burn Road, #06-00
Singapore 369972
Tel: (65) 286 1111
Fax: (65) 286 2222
Produces: Frozen cooked traditional foods

Toh Li Food Products Pte Ltd
203 Block 24 Pandan Loop,
Singapore
Tel: (65) 778 6828
Fax: (65) 775 0818
Produces: Asian meat and poultry products.

Tong Guan Food Products Pte Ltd
33 Chin Bee Crescent,
Singapore 2261
Tel: (65) 264 2828
Fax: (65) 265 2515
Produces: Snacks.

Unicurd Food Co Pte Ltd
18 Senoko South Road,
Singapore
758089
Tel: (65) 7592855
Fax: (65) 7595411
Produces: Soybean products.

Woh Hup Food Industries Pte Ltd
265 Pandan Loop,
Singapore 128438
Tel: (65) 779 1922
Fax: (65) 776 0004
Produces: Sauces.

Woodlands Sunny Foods Pte Ltd
19 Senoko Crescent,
Singapore 2775
Tel: (65) 753 0088
Fax: (65) 753 4038
Produces: Bakery industry supplies.

Yakult (Singapore) Pte Ltd
7 Senoko Avenue,
Singapore 2775
Tel: (65) 756 1033
Fax: (65) 756 1933
Produces: Cultured dairy beverages.

Yeo Hiap Seng Ltd
3 Senoko Way,
Singapore 758057
Tel: (65) 752 2122
Fax: (65) 759 1716 (Purchasing Department)
Produces: Canned food and beverages.

Source: The Singapore Manufacturers Association.

Major Processed Food Businesses in Thailand - Address List

Adams (Thailand) Ltd
Head Office,
415 Soi Sukhumvit 74, (Mitrudom 2),
Sukhumvit Road,
Samrong, Muang,
Samut Prakarn 10270
Thailand
Tel: (662) 393 2286
Fax: (662) 398 3140
Produces: Breathfreshners and medicated sugar confectionery.

Ajinomoto Co.(Thailand) Ltd
487/1 Sriyuthaya Road,
Thanonphayathi,
Ratchthewi, Bangkok 10400
Thailand
Tel: (662) 245 1614
Fax: (662) 246 3887
Produces: Seasonings and other processed foods.

Bangkok Ham Products Supply Co., Ltd
5 Soi Ramkhamhaeng 15,
Ramkhamhaeng Road, Huamark,
Bangkapi, Bangkok 10240
Thailand
Tel: (662) 719 8291
Fax: (662) 318 9769
Produces: Processed meats.

Better Foods Co., Ltd
323 Moo 6, Vibhavadi-Rangsit Road,
Tungsonghong, Donmuang,
Bangkok 10210
Tel: (662) 955 0555
Fax: Not stated
Produces: Processed meats.

Boonrawd Brewery Co., Ltd
999 Samsen Road,
Thanonnakhonchaisri.
Dusit, Bangkok 10300
Thailand
Tel: (662) 241 1361
Fax: (662) 243 6211
Produces: Beer and non-alcoholic drinks.

Carlsberg Brewery (Thailand) Co., Ltd
288/35-37 Surawong Rd, Siphaya,
Bangrak, Bangkok 10500
Thailand
Tel: (662) 235 1350
Fax: Not stated
Produces: Beer and some non-alcoholic drinks.

Cerebos (Thailand) Ltd
140 Kian Nguan 1 Building, L. Fl.
Witthayu, Lumpini,
Pathumwan, Bangkok 10330
Thailand
Tel: (662) 651 4204
Fax: Not stated.
Produces: Chicken extracts.

C.P Food Products Co., Ltd
4/2-9 Soi Pikul, South Sathorn Road,
Yannawa, Sathorn
Bangkok 10120
Thailand
Tel: (662) 286 4475
Fax: Not stated
Produces: Baked products and meat products.

CPC-AJI (Thailand) Ltd,
84 Soi Samanmitr,
Ramkhamheang Road,
Suanluang
Bangkok 10250, Thailand
Tel: (662) 314 4111
Fax: (662)
Produces: Wide range of grocery products.

Dole Thailand Limited
127/11 Panja Thani Tower, 10th Floor,
Rachadapisek Road, Chongnonsi,
Yannawa, Bangkok 10120
Thailand
Tel: (662) 681 0224
Fax: (662) 681 0221
Produces: Canned fruit

Dumex Limited
359 Moo 17 Thepharak Road,
Bangsaothong,
Bangplee,
Samut Prakarn 10540, Thailand
Tel: (662) 315 3230-42
Fax: (662) 315 3229
Produces: Powdered milk.

Dutch Mill Co., Ltd
137/6 Phuthamonthon Sai 8 Road,
Kunkaew, Nakomchaisri,
Nakonpathom 73120
Thailand
Tel: (6634) 331 837
Fax: Not stated
Produces: Dairy products.

European Food PCL
291 Moo 10, Puchaosamingprai Rd,
Samrongthai, Phrapradaeng,
Samutprakarn 10130
Thailand
Tel: (02) 394 0560/2
Fax: 384 2719
Produces: Long life baked products.**

Food Processing Co.
20 Moo 1, Soi Wat Thiandad,
Petchkasem Road,
Banmai, Sampran
Nakorn Pathom 73110
Thailand
Tel: 476 8834-9
Fax: Not stated
Produces: Non-indigenous snack foods

Foremost Dairies Co., (Bangkok) Ltd
99/30 Chaengwatana Road,
Tungsonghong, Donmuang,
Bangkok 10210
Tel: (662) 576 0030-9
Fax (662)
Produces: Wide range of dairy products.

Foremost Friesland (Thailand) Public
Co., Ltd
6th Floor, S.P Building,
388 Paholyothin Road,
Samsennai, Phayathai,
Bangkok 10400
Thailand
Tel: (662) 273 0024, 273 0215-23
Fax: (662) 273 0214
Produces: Wide range of dairy products.

Friendship Co., Ltd
6/1 Soi Pramuan,
Silom Road,
Silom, Bangrak
Bangkok 10500
Thailand
Tel: (662) 236 0330
Fax: (662) 236 7113
Produces: Biscuits

Green Spot (Thailand) Ltd
244 Srinakarin Road, Huamark,
Bangkapi, Bangkok 10240
Thailand
Tel: (662) 377 5088
Fax: (662) 377 8573
Produces: Soft drinks

Haad Thip Public Co., Ltd
87/1 Kanjanavanich Road,
Bangphru, Hat Yai,
Songkla 90250,
Thailand
Tel: (6674) 210 008
Fax: (6674) 210 006
Produces: Coca-Cola beverages.

Kloster (Thailand) Limited
12 Soi Sukhumvit 7 (Letsin 2)
Sukhumvit Road,
Klongtoey, Bangkok 10110
Thailand
Tel: (662) 251 4026
Fax: (662) 251 4027
Produces: Beer

Laemthong Protein Foods Co., Ltd
1126/1 Vanich Building,
New Petchaburi Road,
Makkasan, Rattewi
Bangkok 1040
Thailand
Tel: (662) 252 3777
Fax: (662) 253 9922
Produces: Processed meats.

Malee Sampran Factory PCL
Abico Building, 4th Floor,
401/1 Phaholyothin Road,
Lumlooka, Pathumthani 12130
Thailand
Tel: (662) 992 5800
Fax: (662) 992 5816
Products: Canned fruits and juices

Namchow (Thailand) Limited
26 Sukhumvit 18, Sukhumvit Road,
Klongtoey, Bangkok 10110
Thailand
Tel: (662) 259 7871
Fax: (662) 259 7870
Produces: Instant noodles

Nestlé (Thailand) Limited
500 Phloenchit Road,
Lumpini, Pathumwan,
Bangkok 10330
Thailand
Tel: (662) 256 9119
Fax: (662) 256 9927
Produces: Wide range of processed foods, including powdered milks for children, ice cream etc.

Novatis Nutrition(Thailand) Ltd
9 Ramkhamhaeng Road,
Suanluang,
Bangkok 10250
Thailand
Tel: (662) 719 8209
Fax: Not stated
Produces: Ovaltine beverage powder

Osotpa Co., Ltd
2100 Ramkhamhaeng Road,
Huamark, Bangkapi,
Bangkok 10240
Thailand
Tel: (662) 394 0121
Fax: (662) 374 7014
Produces: Energy drinks

Pataya Food Industries Limited
729/69-72 Soi Watchannai,
Ratchadaphisek Road,
Bangpongpang, Yannawa,
Bangkok 10120
Thailand
Tel: (662) 286 6530
Fax: (662) 287 2009
Produces: Canned foods

President Bakery Co., Ltd
2154/1 New Petchaburi Road,
Bangkapi, Huaykhwang,
Bangkok 10310
Thailand
Tel: (662) 318 0059
Fax: (662) 318 1073
Produces: Daily baked products.

President Rice Products PCL
9th Floor, T.F. Building,
278 Srinakarin Road, Huamark,
Bangkapi, Bangkok 10240
Thailand
Tel: (662) 372 4730
Fax: (662) 364 7956
Produces: Noodles

S. Khon Kaen Food Industry PCL
Head Office,
104 Sukhumvit 65 Road,
Prakanong, Klongtoey,
Bangkok 10110
Thailand
Tel: (662) 391 1010
Fax: (662) 391 1792
Produces: Processed meats

Serm Suk Public Co. Ltd
Muang Thai-Phatra Complex Tower 1,
27-28 Floor,
253/35-36 Rachadapisek Road,
Huay Kwang, Bangkok 10320
Thailand
Tel: (662) 693 2255
Fax: (662) 693 2266
Produces: Pepsi b randed beverages.

Siam Snack Co., Ltd
99 Soi Rubia, Sukhumvit 42 Road,
Prakhanong, Klongtoey,
Bangkok 10110
Thailand
Tel: (662) 313 1470
Fax: (662) 313 1031
Produces: Pepsico branded snacks.

Songkla Canning PCL
Head Office
979/9-10 SM Tower, 12th Floor,
Phaholyothin Road, Samsennai,
Phyathai, Bangkok 10400
Thailand
Tel: (662) 298 0029
Fax: (662) 298 0442
Produces: Canned fish and seafood.

Sun Tech Group PCL
Head Office
17th Floor, UM Tower,
9 Ramkhamhaeng Road,
Suanluang, Bangkok 10250,
Thailand
Tel: (662) 719 9743
Fax: (662) 719 9744
Produces: Canned fruits and vegetables.

Surapon Seafoods PCL
247 Theparak Road, Theparak,
Muang,
Samutprakarn 10270
Thailand
Tel: (662) 385 3038
Fax: (662) 754 641
Produces: Frozen fish, seafood and higher processed foods.

Thai Agri Foods PCL
155/1 Moo 1, Theparak Road,
T. Bangsaothong, Sub A Bangsaothong,
Samutprakarn 10540,
Thailand
Tel: (662) 315 4171
Fax: (662) 315 4169
Produces: Canned foods.

Thai Dairy Industry Co., Ltd
Head Office
140/1 Kian Gwan 2 Bldg, 20th Floor,
Wireless Road,
Lumpini, Pathumwan,
Bangkok 10330, Thailand
Tel: (622) 255 0040-51
Fax: (622) 255 9053
Produces: Dairy products.

Thai Glico Co., Ltd
898 Ploenchit Tower, 13th Floor,
Ploenchit Road,
Lumpini, Pathumwan,
Bangkok 10330, Thailand
Tel: (662) 254 7022-6
Fax: (662) 254 7027
Produces: Snack biscuits

Thai President Foods PCL
278 TF Building,
Srinakarin Road, Huamark,
Bangkapi, Bangkok 10240
Thailand
Tel: (662) 374 4730
Fax: (662) 374 7743
Produces: Noodles and baked products.

Thai Pure Drinks Ltd
214 Thai Pure Drinks North Park,
Vibhavadi-Rangsit Road,
Donmuang, Bangkok 10210
Thailand
Tel: (662) 955 0666
Fax: (662) 955 0850
Produces Coca-Cola branded beverages.

Thai QP Co., Ltd
612-616 Ratchadaphisek Road,
Bukkhalo, Thonburi,
Bangkok 10600
Thailand
Tel: (662) 476 5742
Fax: (662) 476 5744
Produces: Processed foods and seasonings.

Thai Sanwa Food Industrial Co., Ltd
96 Moo 4, Romklao Road,
Klongsam Prawet, Latkrabang,
Bangkok 10520
Thailand
Tel: (662) 534 9855
Fax: (662) 543 9853
Produces: Noodles

Thai Union Frozen Products PCL
979/12 M Floor, SM Tower,
Pahonyothin Road,
Samsennai, Phayathai,
Bangkok 10400
Thailand
Tel: (662) 298 0024
Fax: (662) 298 0548
Produces: Frozen fish and seafood

UFM Food Centre Co., Ltd
593/29-39 Soi Sukhumvit 33/1,
Sukhumvit Road, Khlong Ton Nua,
Khlong Toey, Bangkok 10100
Thailand
Tel: (662) 259 0620
Fax: (662) 259 0636
Produces: Baked products.

Unilever Thai Holdings Ltd
Lever House,
411 Srinkarin Road,
Suanluang,
Bangkok 10250
Thailand
Tel: (662) 351 2000
Fax: (662) 379 5929
Produces: Ice cream and edible oil products.

United Foods PCL
19/111 Thakarm Road,
Bangkhuntien
Bangkok 10150
Thailand
Tel: (662) 415 0035
Fax: (662) 415 1211
Produces: Biscuits, confectionery and other processed foods.

Useful Food Co., Ltd
99 Moo 2, Nimitmai Road,
Minburi
Bangkok 10510
Thailand
Tel: (662) 543 7284
Fax: Not stated
Produces: Introduced snack foods.

Source: Business Research and Data Center, Bangkok