

Singapore Food & Drink Report Q3 2012

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Abstracts

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Singapore's near-term domestic demand outlook looks relatively sanguine, in BMI's view. Strong tourist arrival growth and sturdy labour market conditions will continue to provide support to consumer spending in the coming quarters. While we have previously flagged the acute bursting of Singapore's property bubble as a key risk to our near-term domestic demand outlook, we do not envisage this scenario to occur in 2012. Nonetheless, gradual declines in property prices would inevitably weigh on consumer sentiment.

Headline Industry Data (local currency)

2012 food consumption = +3.2%; compound annual growth rate (CAGR) forecast to 2016 = +3.2%

2012 alcoholic drink value sales = +9.6%; CAGR forecast to 2016 = +6.5%

2012 soft drink value sales = +5.0%; CAGR forecast to 2016 = +3.5%

2012 mass grocery retail sales = +3.0%; CAGR forecast to 2016 = +2.8%

Industry Trends & Developments

A Mixed Bag Of Results: Singapore-based cocoa ingredients and chocolate confectionery manufacturer Petra Foods has expressed concerns over the expected decline in its cocoa ingredients business in 2012. The firm's sales from cocoa ingredients fell around 13% year-on-year (y-o-y) in Q112 (ended March) due to lower

cocoa prices. Earnings before interest, tax, depreciation and amortisation from the firm's cocoa ingredients division increased 1.4% y-o-y during the quarter. Singapore-based conglomerate Auric Pacific witnessed a mixed financial performance for the year ending December 2011. Auric Pacific reported revenue growth of 0.3% and net profit growth of 12.4% for the year ending December 2011. However, a closer look into Auric Pacific's segment results reveals a mixed showing among its business divisions.

YHS And F&N Witnessing Mixed Headwinds: Singapore-based soft drinks manufacturer Yeo Hiap Seng (YHS), which has an extensive presence across Malaysia, reported revenue growth of 7.2% in its food and beverage division for the year ending December 2011. YHS's robust revenue showing in FY2011 partly mirrors the underlying healthy demand conditions in its key markets of Singapore and Malaysia. Strong private consumption growth, increasing retail sales and higher tourism levels have supplied considerable momentum to the mass market in Singapore and Malaysia in 2011, in turn translating into stronger sales opportunities for YHS's soft drinks products. Meanwhile, 2012 is likely to prove a challenging year for trans-Asian soft drinks producer Fraser and Neave (F&N). Softening demand conditions across its Asian markets such as Thailand and the loss of bottling and distribution rights of The Coca-Cola Company's beverage products in Malaysia and Singapore are expected to dampen its near-term sales prospects.

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