



**Enterprise
Singapore**

FROM FARM TO FORK

**Market channels for
high-tech vegetable
farms**

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Preface

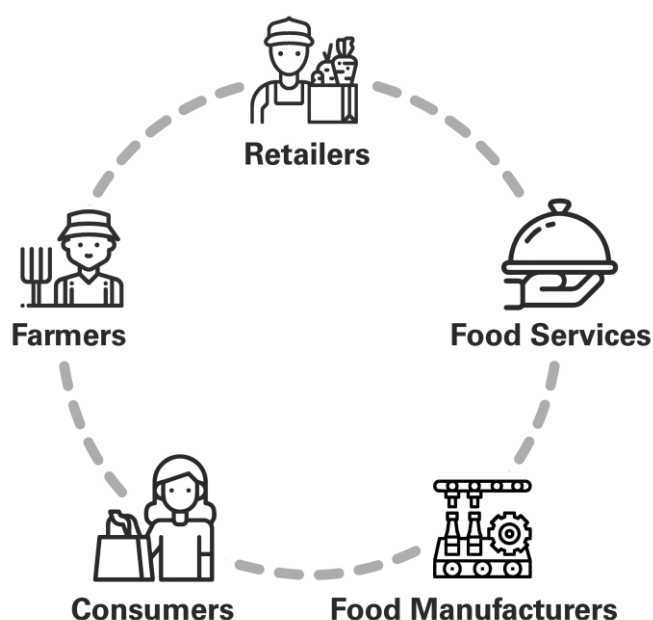
This is a guide for aspiring and current farmer-investors, who are keen to understand the market channels to sell locally grown vegetables in Singapore. Domestic retailers, food service players and food manufacturers will also find this guide a handy resource for them to learn and get more involved with the local farming industry.

This is part of a series of guides to support the growing agritech sector, such as the *Industry Guide for Starting a Farm* (jointly published with SFA) and the [Space Directory for Urban Agritech Enterprises](#).

Visit the Agritech sector section on Enterprise Singapore’s [website](#) for more resources.

“This is an exciting time for the agritech sector in Singapore. Enterprise Singapore will continue to encourage partnerships between all players of the agri-food value chain to champion local produce and bring the farm-to-fork vision to life. This will enable consumers to gain greater access to quality fresh produce, farmers to scale their production confidently, downstream businesses to reduce their food miles and wastage, and for Singapore to build a more vibrant agri-food tech ecosystem in the long run.”

DILYS BOEY | Deputy CEO | Industry Clusters | Enterprise Singapore



Data Source

Based on public data as indicated and interviews with local farms, supermarkets, specialty grocers, and food services players conducted by EnterpriseSG from Jun 2021 – Jun 2022.

Changing face of farming in Singapore

With the development of Singapore as a manufacturing and service-based economy in the past 50 years, agriculture’s presence on the island has shrunk – leaving a handful of food farms occupying about one percent of total land area (<10 sq km) by the turn of the century. Typically, vegetable farmers are small family-run enterprises focused on soil-based cultivation of Asian leafy green varieties.

2018 – Present: Government-led push for high-productivity agriculture

As part of a broader Government policy to ‘Grow Local’ to fortify food security, more land has been tendered for agricultural use, accompanied by requirements and incentives for deployment of higher productivity (yield/sqm) technologies. As of 2021, there are 113 vegetable farms in Singapore – an increase from 85 in 2019.¹

New entrants to vegetable farming tend to utilise one of the following two facility types:



(Left) Indoor vertical farm – fully enclosed, opaque room with a vertical grow system reliant on LED lights.

(Right) Greenhouse – transparent, enclosed structure made of glass or polycarbonate, primarily reliant on sunlight.

Some key differences between traditional farms and new entrants to agriculture in Singapore include:

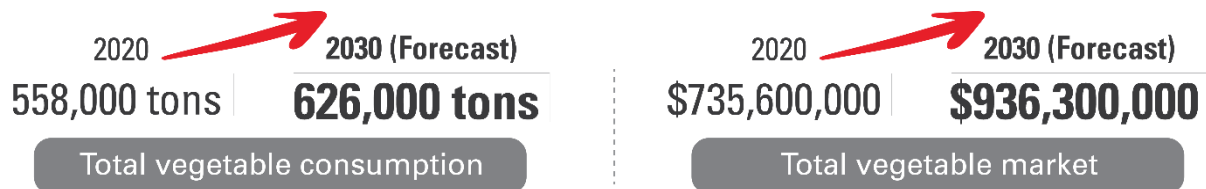
| | Traditional Farms | New Farms (mostly post-2017) |
|--------------------------------|---|---|
| Facility | Some protected cultivation (e.g. shaded netting), with reliance on external climate | Indoor or greenhouse facility, with some to full control of growing environment |
| Cultivation Method | Mostly soil-based, some hydroponics | Mostly hydroponics, some soil-based and aeroponics |
| Land Use | 1-2 ha plot with <3-year short-term lease | 2 ha plot with 20-year lease or <0.5 ha industrial space with 3+3+3-year lease |
| Indicative Productivity | <200 tons/ha/annum | >500 tons/ha/annum (greenhouse) >1000 tons/ha/annum (indoor) |
| Produce Grown | Primarily Asian leafy greens (e.g. Bayam, Caixin) | Asian leafy, Western salad (e.g. lettuce) and specialty greens (e.g. ice plant) |
| Management | Family-run business | Corporate structure, with more PMET roles |

Table 1: Changing face of vegetable farms in Singapore

¹ Source: Singapore Food Statistics 2021 (by Singapore Food Agency)

Overall demand for vegetables

Despite an increase in the number of local vegetable farms, local production of vegetables in 2020 only yielded 22,793 tonnes – a small fraction of the total local vegetable consumption².



Source: Projected with public data from Singapore Department of Statistics, Singapore Food Agency and United Nations Food and Agriculture Organization. Vegetable market size in 2020 accounts for net imports and local production, while projection for 2030 accounts for change in population and nominal food price level.

Common crop mix by local farms

Regardless for traditional farms or new entrants, when making crop growing decisions, farmers consider market demand for the crop in terms of volume (total kg demanded), and value (average \$/kg that the product commands).

In general, there tends to be an inverse relationship, and farmers can expect to earn a smaller margin on a crop with a larger market volume, or a larger margin on a crop with a smaller market volume. Some examples of commonly grown crops by local farms that fall into each category includes:

| CATEGORY | LEAFY | FRUITED | MUSHROOM | HERBS |
|--------------------------------|--|---------------------------|--------------------------|---|
| High-volume / Low-value | Bayam, Caixin, Cabbage, Kangkong, Iceberg Lettuce, Romaine Lettuce, Xiao Bai cai | Tomato, Aubergine, Okra | – | – |
| Low-volume / High-value | Arugula, Butterhead Lettuce, Frisee Lettuce, Kale, Mizuna, Oak Lettuce, Spinach, Swiss Chard | Chili Padi, Cherry Tomato | Button, Shitake, Shimeji | Basil, Coriander, Mint, Ice Plant, Rosemary |

² Source: Yearly Food Supply Statistics (by Singapore Food Agency)

Changing consumer demands



Chasing the Clean, Green, Gourmet demand

Clean, Green, Gourmet (CGG) consumers are more conscious about sustainability, source, and quality of food, and typically have higher purchasing power. In the context of fresh vegetables, they are normally willing to pay significantly more for produce with:

- zero chemical pesticide [Clean]
- lower food miles [Green]
- higher nutritional content & freshness [Gourmet]

CGG vegetables are more costly to produce, of higher quality and hence command a price premium in the market. For local farmers to charge a price premium while catering to the CGG market, they must differentiate their produce through taste, freshness, and nutrition. This could involve certifying their produce to industry standards such as SS661 Clean and Green Urban Farms, conducting iterative research to fine-tune growing recipes for enhanced nutrition and taste, and shortening farm-to-table lead time.

In our qualitative study on more than 10 commercial indoor and rooftop farmers, respondents affirmed that the costs of locally grown vegetables will be relatively higher than imported vegetables due to current production capacity. Hence, to command the higher price premium, local farmers need to communicate the differentiated product quality through focused marketing. In addition, to compete with imports more effectively, local farmers can leverage the understanding of local consumer preference and offer crops that are not commonly grown in the region.

In a parallel study of 200 decision makers on household grocery in Singapore, we find that consumers are willing to pay a small premium for high quality vegetables. For effective consumer engagement, we found that highlighting vegetable traits is more effective than highlighting the 'nationality' of the vegetable, with the key phrases that consumers more readily equate as higher quality vegetable include "contain less chemicals", "organic", "fresher", and "enhanced with nutrients".

Further, when asked to rate statements that highlight different vegetable purchase considerations, appearance and taste were rated the highest indicating that these two factors were consumers' foremost consideration.

Extract from **Agriculture Business Market Scanning Study 2022**
School of Management and Communication, Republic Polytechnic
By: Tio Wee Leng, Jaquilin Danker, Eugene Lee, Vincent Kerk

Please contact Help-smc@rp.edu.sg to learn more about this study.



The farm-to-table game

Taking inspiration from the evolving Californian restaurant scene several years ago, the “Farm-to-Table” movement has begun to gain traction in Asia – including Singapore. The movement calls on consumers to choose natural, often organic, and largely locally produced foods where its source can be traced, over imported or processed alternatives.

Increasingly more local HORECA (hotels, restaurants and food service) players are catching onto the trend and have begun sourcing food from sustainable sources – both locally and overseas – in a bid to win over the CGG consumers dining out.

Some businesses have even taken it one step further to set up their own urban farms on-site to guarantee customers the full farm-to-table experience e.g. Open Farm Community.

Case study:

Local sourcing by SaladStop!



Photo: SaladStop!

SaladStop! committed to source over 30% of its produce locally as outlined in its Sustainability Report released in June 2022, and as part of its contribution to the United Nations Sustainability Development Goals (SDGs).

Today, SaladStop! procures locally grown hydroponic kale that is 100% clean, pesticide-free, and harvested daily. The food service player aims to reach net-zero across the company by 2030.

EnterpriseSG is working closely with the F&B Sustainability Council to support food service players in their local sourcing efforts.

Case study:

Farm-cum-Dining concept: Open Farm Community (OFC)

Founded by the Spa Esprit Group, Open Farming Community (OFC) is Singapore's pioneering urban farm and dining concept in Dempsey.

The ingredients for its dishes are largely sourced from its own in-situ farm or from what's available locally, supplemented by "ethical imports" to fill gaps in supply.

In addition to the restaurant, OFC runs guided farm tours on the second and fourth Saturdays of the month. For the latest updates, visit their website [here](#).



Photo: Open Farm Community

Overview of market channels for fresh vegetables

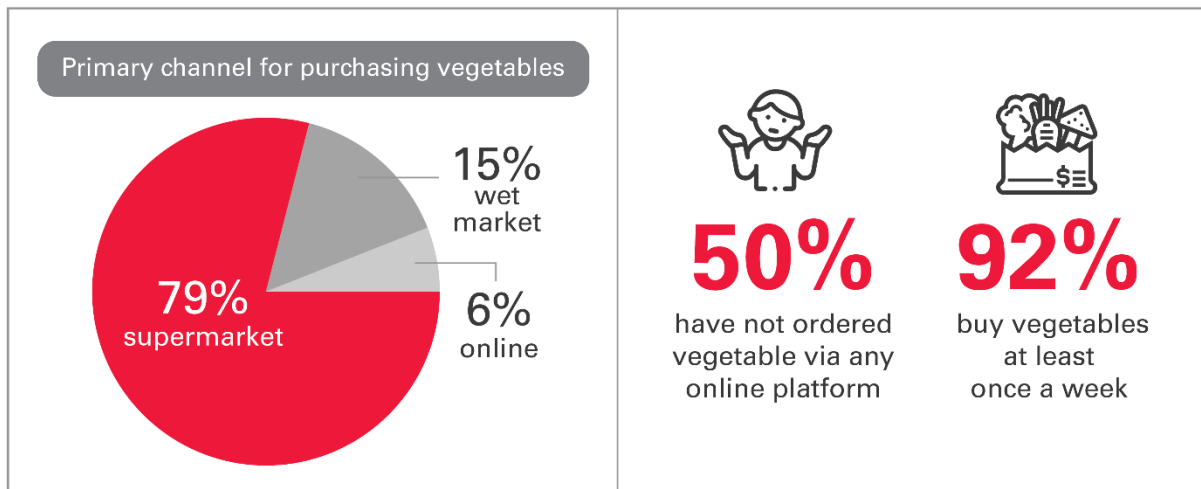
The four main vegetable distribution channels in Singapore are summarised as follows:



| Business-to-Consumer (B2C) | Business-to-Business (B2B) |
|---|--|
| <p>Selling Direct-to-Consumer (D2C)</p> <p>Farms sell their locally grown produce directly to individual consumers online through e-commerce platforms or their owned website, or offline via farmers' markets or retail stores.</p> | <p>Selling Direct-to-Food Service</p> <p>Farms sell their produce directly to players in the hospitality and food services industry, through active marketing by farms and/or word-of-mouth referrals within the culinary and hospitality industry.</p> |
| <p>Selling through Retailers</p> <p>Farms sell their produce to third-party grocers and retailers i.e supermarkets, wet markets etc.</p> | <p>Selling through intermediaries (wholesalers/agents)</p> <p>Farms sell their produce to third-party wholesalers, who then market and distribute (i.e. resell) to the food service sector</p> |

The subsequent chapters will detail the recommended strategies for each of these channels.

Retail market for vegetables



Source: Agriculture Business Market Scanning Study 2022 (survey of 200 decision makers on household grocery in Singapore), conducted by School of Management and Communication, Republic Polytechnic.

Selling direct-to-consumer



How does it work?

- Farms sell their locally grown produce directly to individual consumers online through e-commerce platforms or their owned website, or offline via farmers' markets or retail stores.
- If presence is primarily online, farms typically invest in building a web or mobile shop interface. They may engage a third-party logistics provider for delivery operations until they reach the right scale to invest in owned assets. Outsourced logistics (e.g. Lalamove) costs an average of S\$7-10 per trip.

- This channel relies primarily on marketing and branding efforts of the farms (e.g. social media marketing, mass media coverage, word-of-mouth) to capture and grow their consumer base.

Strategies for successful direct sales

- Build in-house capabilities in the following areas: marketing, customer service, logistics management, and data analytics. Farmers should pay special attention to optimising logistics arrangements, and related costs.
- Trade, source and build a platform that can retail an assortment of produce. Successful retailing platforms should carry an assortment to appeal to the average customer who purchase a variety of items from a single source for convenience, and to justify the delivery costs.

Trends to watch

1. Community-Supported Agriculture (CSA)

CSA is a partnership between farmers and consumers in which the responsibilities, risks, and rewards of farming are shared. Under this alternative model of agriculture and food distribution, consumers (members) often subscribe to the harvest of a certain farm or group of farms and receive regular distributions of the produce throughout the year. The farmer receives advance working capital and earns more revenue from direct marketing, while consumers get to know their farmers and can vet the source of their food.

Case study:

Edible Garden City (EGC)

EGC pioneered a form of CSA in Singapore through the [Citizen Box](#) – a weekly subscription box containing a variety of produce from their farm and other farm partners. The box includes locally grown leafy greens (e.g. kale, lettuce) and edible flowers and herbs (e.g. confetti coriander, pea tendrils) from EGC farm, as well as staple vegetables (e.g. tomatoes, cauliflower) sourced from farm partners.



2. Farmers' markets

These markets offer farmers an opportunity to lease a booth and retail directly to walk-in consumers. The market organiser is primarily responsible for driving footfall to the event.

Some of the farmers' market held in Singapore include:

| Name | Organiser | Contact Details |
|------------------------------------|--|---|
| SG Farmers' Market | Singapore Agro-Food Enterprises Federation (SAFEF) | Email: secretariat@safef.org.sg Tel: 6826 0960 |
| Kranji Countryside Farmer's Market | Kranji Countryside Association (KCA) | Email: secretariat@kranjicountryside.com Tel: 6430 8305 |
| Monthly Farmers' Market | City Sprouts | Email: hello@citysprouts.com.sg Tel: 6468 6772 |
| Central CDC Farmers' Market | Central Singapore CDC | Email: pa_centralsingapore@pa.gov.sg Tel: 6715 7500 |

Selling through retailers

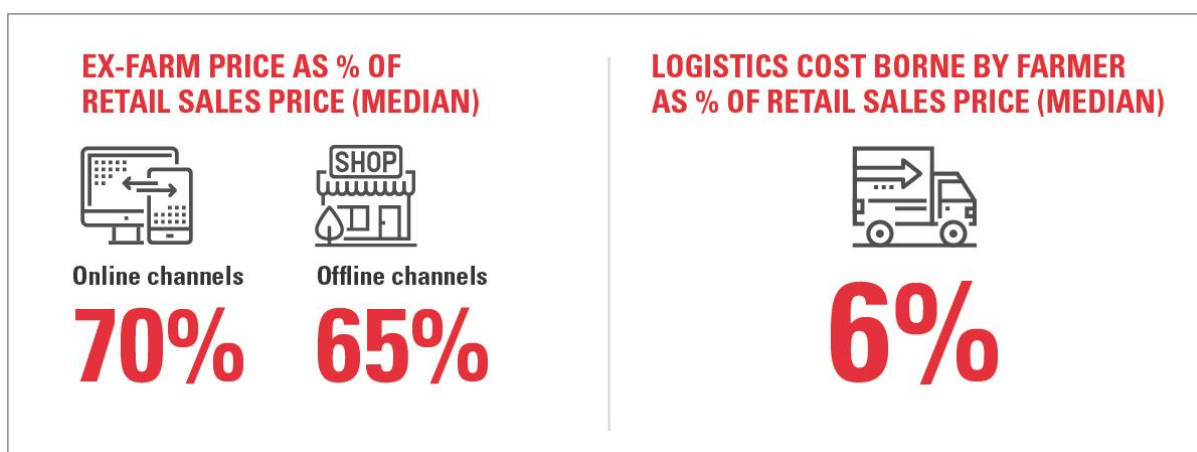


How does it work?

- Farms sell their produce to third-party grocers and retailers. Partnership modalities and terms can differ for online or offline platforms, and between major supermarkets and specialty grocers. For example, for multi-store major supermarkets, it is common for farms to directly liaise with specific stores or chains like NTUC Finest
- There are two primary models for selling through this channel – consignment or wholesale. While farms prefer the wholesale model given higher revenue

and less wastage, retailers prefer the consignment model to defray risks in carrying new products on their platforms or in-store.

- In a consignment model, farms sell their produce to retailers and will only receive revenue when the produce is sold to consumers. Unsold goods that are no longer suitable for sale are returned to farms or disposed.
- In a wholesale model, retailers pay farms a pre-agreed sum for the farm produce. Retailers take on the inventory risk.
- Price received by the farmer ('ex-farm price') is typically around 65-70 percent of the final retail sales price (RSP). However, ex-farm price also differs by platform type, logistics arrangements and crop variety. The farms may incur additional fees for marketing campaigns at point-of-sale.



Source: Business Model Study 2021 (survey and follow-up interviews with 10 high-tech farms), conducted by Enterprise Singapore

Case study:

RedMart's e-SG Farmers' Market



In partnership with the Singapore Agro-Food Enterprises Federation (SAFEF), digital grocer RedMart has a dedicated channel featuring produce from Singapore-based farms. Today, there are over 25 local farms retailing over 200 product SKUs on the platform, making it a convenient one-stop portal for consumers island-wide seeking out local produce.

RedMart also works closely with SAFEF to promote and showcase fresh local produce during festive periods, such as Chinese New Year and National Day. In previous years, RedMart collaborated with popular personalities and chefs to host livestreams showcasing delicious meals that can be made with fresh local produce.

Strategies for successful partnerships with major supermarkets

- Meet a minimum volume requirement per stock-keeping unit (SKU) consistently. Major supermarkets tend to view supply and quality inconsistency as a dealbreaker in negotiations.
- Comply with established protocols for working with suppliers, such as those governing terms around packaging, and credit terms.
- Be aware that supermarkets are relatively price sensitive, as their priority is to keep produce affordable for the consumer masses.

Strategies for successful partnerships with specialty grocers

- Specialty grocers typically embrace brand values relating to sustainability, quality and/or community. Farms should be able to align their brand story with their preferred specialty grocer partner.
- Meet the relatively higher quality and/or sustainability requirements that specialty grocers may have. For instance, they may require partner to uphold specific standards (e.g. zero-use of chemicals) or use sustainable packaging.
- Provide greater variety of SKUs and 'exclusive' SKUs which are not available on other retailing platforms. While requiring a lower volume per SKU (compared to major supermarkets), specialty grocers tend to prefer more variety from a single farm source.

Trends to watch

1. Rise of experiential retail

Increasingly, companies are designing a unique immersive brand experience for their consumers in its physical store, complemented by online channels, leading to positive brand associations, increased brand loyalty, and sales conversions.

FOOD FOR THOUGHT:

How can your farm incorporate experiential offerings as part of your value proposition?



Sensory stimulations
Emotional connections
Behavioral triggers



Designed to drive
social buzz



Refresh of experiences
to attract customers
to repeat visits



Interactive
technology

Case study:

InFarm deploying vertical farms in supermarkets

Berlin-based urban agriculture specialist InFarm partnered Coop Denmark to deploy their smart vertical farms in all Coop-owned grocery chains (Coop, Kvickly, Fakta/Coop365, SuperBrugsen and Dagli'Brugsen) throughout Denmark. They also forged a similar partnership with seven supermarket chains in Tokyo to install and manage vertical in-store farms.



Photo © thespoon.tech

These stores feature InFarm's compact smart vertical farms which produce fresh leafy greens and herbs in-store, hence eliminating transportation costs and food wastage. The farms are remotely controlled, and the modular farms can be adapted to different retail spaces.

2. Brand consolidation by product type and rise of house brands

Among retailers, there is a trend towards third-party brand consolidation and building the house brand. For instance, RedMart grew its house brand from <10 products in 2015 to >500 products in 2022. In a similar vein, both NTUC FairPrice and Dairy Farm International (including Giant, Cold Storage) reported significant increase in sales for their house brands in the last few years.³

As house-brands tend to be cheaper than third-party brands, this stems from a desire to appeal to more cost-conscious consumers, especially in an inflationary environment. Further, there is risk of cannibalisation if retailers onboard too many brands in the same product type.

FOOD FOR THOUGHT:

What is your farm's approach to working with house brands?

As an industry, how can local farms grow more diverse offerings such that the market is not inundated with many different brands for the same product type?

³ Quek, Eunice. 7 house brands by supermarkets, online stores: Which offers the most bang for bug? (2022, April 30). <https://www.straitstimes.com/life/food/house-brands-find-favour>

Food service market for vegetables

Selling direct-to-food service



How does it work?

- Farms sell their produce directly to players in the hospitality and food services industry, through active marketing by farms and/or word-of-mouth referrals within the culinary and hospitality industry. Today, food service players most commonly procure salad greens, edible flowers, microgreens, and herbs from local farms.
- Orders are typically placed via text or call to the farm every 1-3 days. Food service players prefer to keep the procurement cycles short with smaller and more frequent drops to maintain quality and freshness. Notwithstanding, some restaurants are willing to offer demand projections to help farmers plan their crop cycles.
- Logistics arrangement is part of the contractual discussion between farms and the food service player. Larger food service players like hotels may have their own logistics assets.

Strategies for successful partnerships with food service companies

- There are a handful of food service players who have successfully built a brand across local, sustainable sourcing and farm-to-table concepts (e.g. Little Farms, Summerhouse, Open Farm Community). These are still relatively niche concepts, with the clientele typically limited to the middle-upper consumer segment, in areas like Tanglin, Dempsey. Local farms can target such food service concepts to start (and build a track record), while being mindful that

they are typically willing to pay a premium of less than 20 percent for local produce of similar quality and taste.⁴

- Produce with discernible quality and taste differences can justify the corresponding price premium. Examples include:
 - Produce with a strong flavour profile that can define the taste of a dish
 - Produce that can be eaten raw e.g. fresh vegetable wraps, salads
 - Produce which are typically air-flown with short shelf lives
- There are opportunities for high tech farms with the ability to control most of the production parameters to innovate and tailor-farm vegetables based on the specific nutrition or flavour requirement of food service clients. Local farms and food service companies can work hand-in-hand to develop and experiment with novel dishes that can bring out the best of local farm produce, while enabling food service players to differentiate their dishes from others.

Case study:

Petalicious



Petalicious, an indoor farm specialising in the farming of microgreens and edible flowers, works closely with their food service clients to innovate unique and tailor flavour profiles.

Today, Petalicious is the exclusive local microgreens grower for Angliss, a leading distributor to the food service sector.

They are able to meet the needs of their clients through:

- Direct engagement with chefs to understand what they want and how they intend to use it in their dishes
- Growing items typically imported from temperate countries using indoor farming technology
- Adding five to ten new and exciting products every year

⁴ Source: industry interviews conducted by Enterprise Singapore in 2022 1H

Selling through intermediaries (wholesalers/agents)



How does it work?

- Farms sell their produce to third-party wholesalers, who then market and distribute (i.e. resell) to the food service sector. The wholesaler typically bears the financial, inventory, and commercial risks after purchasing the produce from the local farms. However, there may also be other risk-sharing models, subject to negotiation.
- Farms can also work with an agent to sell to food service companies on their behalf – at a price that is independently decided by the farm. The agent will receive a commission from the farm for carrying out marketing and distribution functions but does not take any upside gains or bear downside risks associated with the sale.

Value proposition of an intermediary

- Due to just-in-time procurement cycles and limited variety offered by most individual local farms, the average food service order volume for each farm tends to be small (<10kg each time). This may not meet the minimum order value to justify logistics costs. An intermediary can aggregate offerings across different sources for a food service company to order a larger basket of goods to meet the minimum order value, despite their short procurement cycles.
- Farms can leverage post-harvest services of an intermediary in terms of processing, packaging, logistics, marketing, and sales management. For smaller farms, there may be insufficient scale to justify in-house investments in these functions.

Strategies for successful partnerships with intermediaries

- As the market for local produce is still nascent, there are few wholesale-distributors that are willing to take large inventory risks with local produce. Farms and wholesalers will need to come together to negotiate partnership

terms (e.g. on pricing, pre-orders) in good faith, where the risk is distributed across both parties.

- For wholesalers of imported vegetables, 20-25 percent of their imports can go to waste due to the deterioration of produce in the supply chain. Local farmers should carefully plan harvests and leverage shorter supply chains to reduce wastage.
- Local farms can exercise flexibility with their harvesting schedules to support intermediaries with route planning and streamlining of logistics costs. This is pertinent if the same distributor works with multiple farms clustered in an area (e.g. Lim Chu Kang).

Case study:

Backyard Productions by FoodXservices



FoodXservices is a one-stop distributor to more than 1,500 food service clients in Singapore, ranging from top hotels, restaurants to culinary schools and institutions. They carry more than 4,000 stock-keeping units (SKUs), including food and non-food items like mops and dishwashing sponges.

As part of their foray into the fresh produce category and drive to support local agriculture, FoodXservices officially launched “[Backyard Productions](#)” in October 2021 to aggregate, market, and distribute for multiple local farms. As they supply a large basket of goods to the food service sector, this offers flexibility for their clients to add local produce to their current orders without incurring additional delivery costs.



Currently, the company works with more than 10 local farms and actively onboards new farm partners. They also periodically partner food service players to run special menus centering on local produce. Watch their documentary [here](#).

Interested local farmers can reach out to FoodXservices via their contact form [here](#).

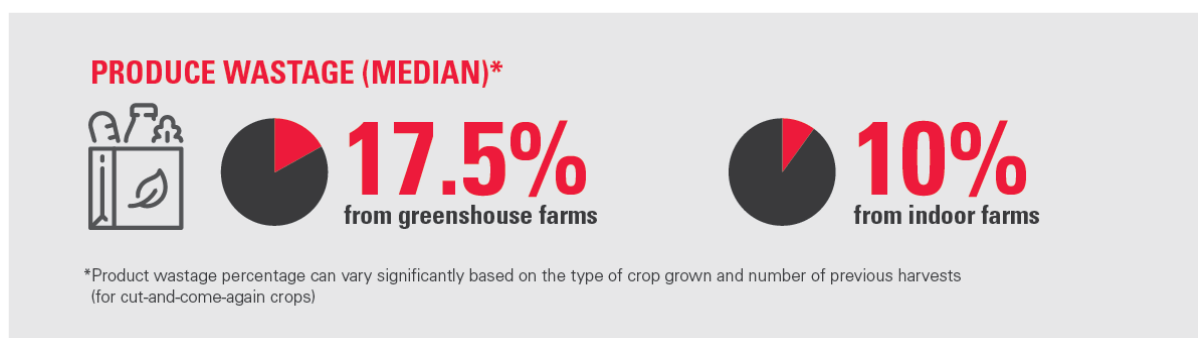
This initiative is supported by EnterpriseSG.

“The country has invested in the agritech industry intensely over the last few years. Seeing a gap in the last mile for the farms, we stepped up to support to the best of our abilities. While the world has changed over the last few years, our commitment behind the movement remains. We can truly achieve a lot more collectively as one.”

NICHOL NG | Managing Director | FoodXservices




Transforming vegetables into shelf-stable products

Farmers are exploring opportunities for unsold perishable inventory, “ugly” produce or offcuts undervalued by traditional channels to be processed into value-added manufactured products with longer shelf-life. Creation of such manufactured products (e.g. juices, sauces, snacks) is a valuable waste and surplus management strategy and can help farmers increase revenue and improve overall margins.



Source: Business Model Study 2021 (survey and follow-up interviews with 10 high-tech farms), conducted by Enterprise Singapore

Find Resource Partners that can support local farms on your journey of food product development:

| | |
|---|--|
| <p>Food Innovation & Resource Centre (by Singapore Polytechnic)</p>  | <p>Food product development services, including advice on formulation, packaging, shelf-life, and partners</p> <p>Contact: Zen Tan <Zen_TAN@sp.edu.sg></p> |
| <p>FoodPlant (by Singapore Institute of Technology)</p>  | <p>Shared facility for small-batch food production that provides opportunities for startups and manufacturers to co-produce, testbed, and commercialise products at a lower cost</p> <p>Contact: Lim Bee Gim <BeeGee.Lim@singaporetech.edu.sg></p> |
| <p>Formulation and Nutrition Science Technology Centre (by Republic Polytechnic)</p>  | <p>Food product development services, including advice on formulation, packaging, shelf-life, and partners</p> <p>Contact: Samuel Aw <samuel_aw@rp.edu.sg></p> |
| <p>OEM Matchmaking Initiative (by EnterpriseSG)</p> | <p>Match farms looking to tap OEM partners to diversify their product offerings to food manufacturers with untapped production capacity</p> <p>Contact: EnterpriseSG Food Manufacturing <foodmfg@enterprisesg.gov.sg></p> |

Looking ahead

Agriculture is starting a new lease of life in Singapore thanks to the advent of technology. Due to Singapore's cost environment, locally farmed produce will generally be more costly than imported produce – as such, it is critical for local farms to focus on improving the quality of produce and target consumers who are able to appreciate and willing to pay a price premium for Clean, Green, Gourmet products.

The local farming industry should also continually experiment and expand the variety of produce grown; this lowers the risk of saturating the market and enables farms to better cater to channels with a preference for variety from a single source (e.g. individual consumers, specialty grocers).

In this guide, we detailed the four main vegetable distribution channels in Singapore. Each of these channels has its own merits, and farms are encouraged to assess the best fit based on their capabilities and networks. For instance, newer, smaller farms may target specialty grocers and individual higher-end restaurants while larger scale farms with optimised cost may be in a better position to negotiate with mainstream retailers.

Ultimately, the success of local farmers is closely linked to the partnership, support, and feedback from other players along the farm-to-fork value chain. This is particular pertinent as demand certainty and immediate offtake are critical to maintain the quality of fresh vegetables with shelf lives. Through this guide, we hope to inspire and support stakeholders in the agri-food value chain to adapt and grow locally and overseas.

Disclaimer

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