



Publication Date : June 1997



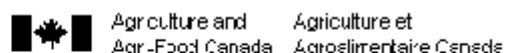
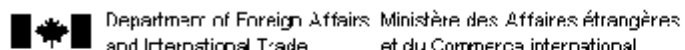
The Pet Food Market in Singapore

June 1997

*(Également disponible en français sous le titre,
Le marché de la nourriture pour animaux de compagnie à Singapour)*

Prepared by the

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and the
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The Team Canada Market Research Centre produces a wide range of market reports by region and sector for Canadian exporters. For further information please contact:

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 -the Agri-food Trade Network
 (<http://www.atn-riae.agr.ca>)

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THE PET FOOD MARKET IN SINGAPORE



EXECUTIVE SUMMARY

This report is intended to provide a brief, detailed analysis of the Singapore market for pet food. Retail sales of pet food grew 48% between 1991 and 1995 to reach C\$65 million. This translates into a per capita expenditure of C\$22, making Singapore the most developed pet food market in the region.

The Singapore pet food market is supplied both by local manufacturers and imports. Imports totalled C\$8.8 million in 1995, down from C\$22.3 million in 1994. Forecasts indicate that pet food sales will continue growing and reach C\$86 million by 2000. Volume sales are expected to increase substantially more, indicating that prices are likely to fall as more competitors enter the marketplace.

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THE PET FOOD MARKET IN SINGAPORE



MARKET OVERVIEW

Market size and projections

Singapore's high average income of C\$30 000 has made it the single most developed pet food market in the region. As seen in Table 1 between 1991 and 1995, total pet food sales in Singapore increased 47.8%, from C\$44 million to C\$65 million, the fastest growth rate in the region. In 1995 dog food represented 53% of pet food sales, down from 56% in 1991.

Cat food in Singapore has a much larger market share than in other countries in the region. This is primarily due to Singaporeans being more accepting of cats as pets. Living accommodations in Singapore are generally small, thus small pets such as cats are popular.

Singaporeans are quite fond of their pets, as a result pet accessories and pet food delicacies (chocolates, cookies, biscuits, and dried meats) are readily available for consumers. Pet foods on the market are varied ranging from baby formulas and exotic meals, to food for ageing pets.

The outlook for pet food sales in Singapore is extremely strong, but growth is expected to be lower in comparison to recent years. Table 1. shows that between 1996 and 2000, pet food sales are expected to grow 28.6% to reach a total of C\$86.2 million.

The competitive environment

Table 1. Pet food sales in Singapore, 1991 to 1995 and projections to 2000

	<u>Cat food</u>		<u>Dog food</u>		<u>Total</u>	
	<u>Value (in C\$ millions)</u>	<u>Volume (in tonnes)</u>	<u>Value (in C\$ millions)</u>	<u>Volume (in tonnes)</u>	<u>Value (in C\$ millions)</u>	<u>Volume (in tonnes)</u>
1991	\$19.16	3 285	\$24.91	5 683	\$44.07	8 968
1992	22.99	3 597	28.74	6 365	51.73	9 962
1993	26.82	3 914	33.53	7 269	60.35	11 183
1994	27.78	4 237	34.49	8 470	62.27	12 707
1995	29.70	4 534	35.45	9 741	65.14	14 275
1996	na	4 810	na	11 100	67.06	15 910
1997	na	5 100	na	12 430	70.89	17 530
1998	na	5 355	na	13 550	76.64	18 905
1999	na	5 515	na	14 630	81.43	20 145
2000	na	5 650	na	15 600	86.22	21 250
Growth:						
1991-						
1995	55.0%	38.0%	42.3%	71.4%	47.8%	59.2%
1996-	na	17.5%	na	40.5%	28.6%	33.6%
2000						

Source: Euromonitor, *The Market For Packaged Food In South East Asia*, 1996

The import of pet food declined substantially between 1994 and 1995. In 1995 imports totalled C\$8.8 million down 60.5% from C\$22.3 million in 1994. This drop came as a result of decreased pet food exports from Malaysia, United Kingdom, and Belgium. Australia and the United States are the two largest suppliers of pet food to Singapore representing 88.6% of all imports in 1995 (as seen in Table 2).

Many multinationals sell their products in Singapore. Brands such as Friskies, Gourmet, Sheba, and Science Diet are popular.

Table 2. Top five exporters of pet food to Singapore, 1995 (in C\$)

Supplier	1994	1995
World	\$22 328 630	\$8 845 380
Australia	4 791 880	4 122 250
United States	5 836 880	3 718 000
Thailand	1 084 880	437 250
France	210 380	166 380
Malaysia	1 379 130	152 630

Source: International Trade Data Bank, TIERS

The Canadian position

Canada did not export any pet food to Singapore in 1994 or 1995.

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DISTRIBUTION CHANNELS

Overview of distribution system

Importers and intermediaries

Although there is some direct importing of pet food by retailers, the majority of food products are purchased by importers and other agents for redistribution in Singapore. In general one agent or distributor is sufficient to cover the Singapore market. Doing business with Singaporean importers is open and straightforward. Product quality is important, but pricing must be competitive. Depending on the importer, mark-ups range from 20% to 40%. See Appendix C for a list of pet food importers in Singapore.

Retail distributors

The growing demand for pet products has led to an increase in the stores selling them. According to the Primary Production Department, pet product retailers have increased from just a few in previous years to 146 in 1995. Some of these include Pet Movers Pte Ltd, All Breeds Pets, 2D's Pet Shop, and Pet Supplies Centre.

Typically, retailers charge slotting/listing fees for shelf space and suppliers may be expected to pay an extra charge based on the amount of chiller, freezer or dry-shelf space required. An administrative fee of C\$975 may also be required. Suppliers must negotiate the retail sales price with the retailer. As a general rule, retail margins are 15-20% for dry products.

The retail sector in Singapore is well developed and, in many ways, similar to that in Canada. Different retail chains attempt to exploit different market niches. Some of the larger chains, such as NTUC, import products directly to eliminate a step in the handling process and keep retail prices down accordingly. Supermarkets are increasingly becoming involved in direct importation as a way to test market new products and reduce costs. See Appendix C for a complete list of food retailers.

Table 3. Major retail chains in Singapore

Chain	Number of outlets	Market niche
7-11	82	Convenience stores.
Dairmaru	2	Caters to middle- and upper-income consumers. Known for its excellent meat and fruit sections.
Econ Mini-Mart	170	Convenience stores. (Provision Suppliers)
Cold Storage	17	Caters to middle- and upper-income consumers. Long-time favourite of expatriate population.
Emporium	24	Caters to low- and middle-income consumers.
Jason's	1	Carries gourmet and specialty foods.
Kerry's	1	New upscale supermarket called Tanglin Market Place. Keen to source new products from North America.
Kimisawa (Isetan)	1	Caters to middle- and upper-income consumers. Strategically located near expatriate communities.
NTUC	47	Government-owned outlets. Meets the people's daily needs. About six outlets aimed at upper-income shoppers.
Prime	12	Caters to low- and middle-income consumers.
S-Mart	10	Convenience stores. Smaller than regular supermarket, yet larger than 7-11 outlet. Usually located in housing areas.
SOGO	3	Carries gourmet and specialty foods, but also focuses on basic goods. Most are willing to try new products.
Tierney's	1	Gourmet food store which caters to expatriates, mostly of European origin.
Yaohan	4	Caters to middle- and upper-income consumers. Known for its selection of Japanese foods.
Other retailers	1200	Located in housing estates.

Source: World Trade Data Base

Promotional considerations

Constant promotion and advertising are necessary to maintain and expand market share. Importers have to provide special price reductions from time to time to ensure they retain their respective market shares. Publications such as *Asian Retailer*, *Retail Asia* and *the Straits Times* - Singapore's daily newspaper - are commonly used by the food trade to promote branded products. Retailers will, for a fee, produce in-store promotional materials, include a product in its newspaper advertisements, and allow suppliers to set up in-store demonstration and sampling stands.

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CONSIDERATION FOR MARKET ENTRY

In general, a number of steps must be taken to import pet food into Singapore. Although not required, it is recommended that the Canadian vendor acquire a local representative who must possess an import license. All products and labels must be registered with the Singapore

government, with documentary support of proper laboratory analysis. All documents must be authenticated in Canada prior to shipment. Ordinarily, an exporter's local representative will handle all dealings with local government agencies.

Local standards and regulations

Health, and food safety

Singapore's food regulations are continually being amended. Any new food ingredients entering Singapore must first be approved by a Food Advisory Committee. Foodstuffs or food ingredients which are not covered by Singapore's food regulations must be approved by Singapore's Food Control Department before their importation will be approved by the Trade Development Board.

Packaging and labelling

Product packaging requirements are consistent with most North American practices, although Singapore's tropical environment should be considered. Proper labelling (in English) is required on all imported pet food. Each label must present the following information:

- common name of the product;
- brand name of the product;
- listing of ingredients;
- minimum quantity stated in metric measure;
- name and address of the manufacturer and importer;
- nutritional value of the product;
- country of origin; and
- expiration date.

Pictorial illustrations may also be used, but must not mislead about the true nature or origin of the product (Exporters Encyclopaedia, 1995)

Documentation and procedures

Required Documentation

When goods enter Singapore, companies must submit the proper documentation to the Controller of Imports and Exports. Singapore introduced an electronic trade documentation system called Tradenet to facilitate import/export documentation. The system ensures that goods moving into and out of Singapore are processed with minimum delay.

a) Import license: Singapore operates under a free trade policy, thus pet foods do not require licensing. Companies importing goods in Singapore need to obtain a Central Registration Number from the Trade Development Board (see Appendix D). Import permits cost between C\$24 and C\$34 depending on the product.

c) Food registration: All importers must conform to the regulations prescribed in the *Singapore Food Act*, a copy of which can be obtained for C\$16. All imported foodstuffs must be registered on an annual basis with the Food Control Department. Registration can be undertaken by sending the department a copy of the inward declaration that has been approved by the Singapore Trade Development Board. Registration covers a one-year period for a particular product.

d) Shipping documents: Companies must provide the original invoice to customs and two copies to the consignee. The invoice must be signed by a member of the firm and must show an accurate

description of goods, quantity, c.i.f. value, country of origin, name of vessel, and description of packages (Exporters Encyclopaedia, 1995)

Authentication of documents

Documents that need to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. Then, the notarized documents can be authenticated by sending them to:

Department of Foreign Affairs and International Trade
Authentication and Service of Documents (JLAC)
125 Sussex Drive, Ottawa K1A 0G2
ATTN: Mario Nuñez-Suarez
Telephone: (613) 992-6602
Facsimile: (613) 992-2467

Customs duties, tariffs and taxes

There is no duty on imported pet food.

Transportation and storage

There are adequate storage facilities as Singapore is a major transshipment port and a warehousing and distribution center.

Export financing and payment

Payment in trade transactions is commonly made either through irrevocable letter of credit or electronic transfer. For letters of credit, the normal payment periods are 60, 120 and 180 days. Financing of between 7 to 30 days is often requested for large orders, when the relationship between buyer and seller is well established and a degree of mutual trust has been earned.

Cultural and business practices

Canadian exporters should understand the cultural nuances of doing business in Singapore. The handshake is the traditional greeting, although it should normally be initiated by the host. The handshake is typically followed by an exchange of business cards which, preferably, should have Chinese text printed on one side. English is the accepted language of business in Singapore and Western-style business wear is commonly worn. Business issues are usually discussed only after a rapport has been established. Singapore is home to large Chinese, Malay and Indian populations, and their customs are often shaped by their individual ethnocultural backgrounds. For example, one should never offer anything with the left hand to a person of Malay or Indian descent.

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REFERENCE MATERIAL

Agriculture and Agri-Food Canada, *Export Market Assessment Report: Singapore*, October 1996.

Department of Foreign Affairs and International Trade, *Singapore: A Guide for Canadian Business*, 1995 (InfoCentre code 15CA English, 15CF Français).

Euromonitor International, *The Market for Packaged Foods in South East Asia*, Great Britain, 1996.

Exporters Encyclopaedia *Singapore Country Profile*, 1995, Dun & Bradstreet, Inc.

Asia Petnet: A site which provides information on pet products and services in Singapore — <http://www.petnet.vitnet.com.sg/>

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APPENDIX A — STATISTICAL TABLES

Exports of pet food to Singapore, 1991 to 1995 (in C\$)

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United States	5 836 880	3 718 000
Thailand	1 084 880	437 250
France	210 380	166 380
Malaysia	1 379 130	152 630
United Kingdom	268 130	138 880
Japan	1 960 750	100 380
Switzerland	0	4 130
Belgium	2 224 750	2 750
Germany	1 300 750	1 380
Taiwan	1 779 250	0
Other	1 491 880	1 380

Source: International Trade Data Bank, TIERS

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APPENDIX B — TRADE SHOWS AND PROMOTIONAL VENUES

Event/Venue	Description	Organizer
FMI ASIAMART Singapore Convention & Exhibition Center Singapore, Singapore 15-17 October, 1997 28-30 October, 1998	Annual international trade show attracts 5000 visitors. Exhibition space of 3500m ² holds 120 local and 80 foreign exhibitors of food supplies & services available to the Asian Pacific supermarket industry.	Food Marketing Institute (FMI) Contact: Jennifer Steele 800 Connecticut Ave. NW Washington DC 20006 U.S.A. Telephone: (202) 452-8444 Facsimile: (202) 429-4519 E-mail: fmi@fmi.org

<p>ZOORAMA Exhibition & Conference for the International Pet Industry</p>	<p>Biennial international trade show attracts 1500 local and 2000 foreign visitors. Exhibition space of 1000m² holds 17 local and 35 foreign visitors of pet accessories, and products from aquatic and pet industry.</p>	<p>Miller Freeman Pte Ltd Contact: Daniel Chan 100 Beach Rd #26-00 Shaw Towers Sing 189702, Singapore Telephone: (65) 294-3366 Facsimile: (65) 299-9782 E-mail: aguarama@singnet.com.sg</p>
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APPENDIX C — PET FOOD IMPORTERS IN SINGAPORE

Kumra Company
Contact: Vipon Kumra
1 Colombo Court #08-16
Singapore, 0719
Telephone: (65) 338-1745
Facsimile: (65) 337-3129

Retailers

2D's Pet Shop
5 Coronation Road
#01-03 Coronation Arcade
Telephone: (65) 463-4388

All Breeds Pets
44 Jalan Merah Saga
#01-44/46 Singapore 278116
E-mail: abp@vitnet.com.sg

Animal World Pet Services
Block 160 Toa Payoh Lorong 1
#01-1580 Singapore 310160
Telephone: (65) 259-2229
Facsimile: (65) 353-2894
E-mail: animalwrld@vitnet.com.sg

Cold Storage Singapore Pte. Ltd
Contact: Ms Poh Choo Shum,
Buying and Marketing Manager
Blk 60B 60 Martin Road
Room 06-08, Trade Mart
Singapore 0923
Telephone: (65) 735-9995
Facsimile: (65) 735-1311

Pacific Vision
Contact: Tay Keng Leng
180 Ang Mo Kio, Ave 5, #8-2984
Singapore, 2056
Telephone: (65) 457-4818
Facsimile: (65) 552-2048

NTUC Fairprice Co-operative
Contact: Mr. Ho Seng Lim, General Manager
680 Upper Thomson Road
Singapore 2678
Telephone: (65) 456-0233
Facsimile: (65) 458-8975

Oriental Emporium and Supermarket Pte.
Emporium Holdings Ltd.
Contact: Mr. B.L. Teh, Managing Director
Head Office
Blk 712 Ang Mo Kio Ave 6 #03-4056
Singapore 2056
Telephone: (65) 459-3828
Facsimile: (65) 458-1096

Paradise Pet Shop
232 Whitley Road
Singapore 297824
Telephone: (65) 256-5525
Facsimile: (65) 256-2236

Pet Lovers Centre
705 Sims Drive 303-14
Shun Li Industrial Complex
Singapore 1438
Telephone: (65) 743-9260
Facsimile: 965) 743-8095
E-mail: petlovers@vitnet.com.sg

K-9 Command Products Pte Ltd
 2 Pandan Valley 301-21
 Pandan Valley Condo
 Telephone: (65) 468-7168
 Facsimile: (65) 469-9918
 E-mail: K9@vitnet.com.sg

Pet Movers Pte Ltd
 No. 4 Paisir Ris Farmway II
 Singapore 519318
 Singapore
 Telephone: (65) 581-3688
 Facsimile: (65) 581-3735
 E-mail: petmovers@vitnet.com.sg

Pet Supplies Centre
 Telephone: (65) 284-1112
 Facsimile: (65) 283-6487
 E-mail: psc@vitnet.com.sg

Petsville
 3 Souh Buona Vista Rd
 #03-08 South Buona Vista Ctr
 Singapore 118136
 Telephone: (65) 779-8981
 Facsimile: (65) 779-8985
 E-mail: pv@vitnet.com.sg

Sogo Department Stores Pte. Ltd.
 Contact: Mr. Masao Nakano,
 Managing Director
 250 North Bridge Road, Room 04-10
 Singapore 0617
 Telephone: (65) 339-1100
 Facsimile: (65) 339-6694

Yaohan Singapore Pte. Ltd.
 Contact: Mr S. Sato, Managing Director
 Head Office, 2 Jurong East Street 21
 Suite 04-01, IMM Building
 Singapore 2260
 Telephone: (65) 568-2000
 Facsimile: (65) 568-2900

S-Mart Supermarket Pte. Ltd.
 Contact: Mr. Francis Tay,
 Buying Manager
 224 Pandan Loop
 Singapore 0512
 Telephone: (65) 752-1032
 Facsimile: (65) 775-0668

Prime Mart Trading Pte. Ltd.
 Contact: Mr. Tan Hong Khoon,
 Managing Director, Retail Operations
 37 Kim Chuan Drive
 Singapore 1953
 Telephone: (65) 284-9184
 Facsimile: (65) 284-9248

Singapore Daimaru Pte. Ltd
 Contact: Mr. M. Kanuma, Managing Director
 177 River Valley Rd. #04-10
 Singapore 0617
 Telephone: (65) 339-1111
 Facsimile: (65) 336-4497

Waggie's Pet Care
 66 Namly Place
 Singapore 267211
 Telephone: (65) 463-1066, 463-1077
 Facsimile: (65) 463-1022
 E-mail: waggie@vitnet.com.sg

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APPENDIX D — KEY GOVERNMENT CONTACTS AND SUPPORT SERVICES

Canadian government contacts

Canadian High Commission
Commercial Division
80 Anson Road
Suite 14-00, IBM Towers
Singapore 0207
Contact: Ms Eileen Durand,
First Secretary (Agriculture and Food)
Telephone: (65) 225-6363
Facsimile: (65) 226-1541

Department of Foreign Affairs
and International Trade
Southeast Asia Division (PSE)
125 Sussex Drive
Ottawa K1A 0G2
Contact: Mr. Michael Cleary
Telephone: (613) 995-7662
Facsimile: (613) 944-1604

Agriculture and Agri-Food Canada
Sir John Carling Building
930 Carling Ave
Ottawa, K1A 0C5
Contact: Lucie Goyette
Telephone: (613) 759-7616
Email: goyettel@em.agr.ca

Canadian Export Development Corporation
151 O'Connor Street
Ottawa, K1P 5T9
Telephone: (613) 589-2500
Facsimile: (613) 598-2503

Singapore government offices in Canada

Singapore Consulate Representative
999 West Hastings Street, Suite 1305
Vancouver, B.C., V6C 2W2
Telephone: (604) 669-5115
Facsimile: (604) 669-5153

Ministry of Foreign Affairs
Raffles City Tower, Suite 07-00
250 North Bridge Rd.
Singapore 0617
Telephone: (65) 336-1177
Facsimile: (65) 339-4330

Registration number
Ministry of Trade and Industry
Treasury Bldg, Suite 48-01
8 Shenton Way
Singapore 0106
Telephone: (65) 225-9911
Facsimile: (65) 323-9260

Import permits:
Singapore Trade Development Board
Bugis Junction Office Tower, Suite 07-00
230 Victoria Street
Singapore 0718
Telephone: (65) 337-6628
Facsimile: (65) 337-6898

Singapore High Commission
231 East 51st Street
New York, N.Y.
USA 10022
Telephone: (212) 826-0840
Facsimile: (212) 826-2964

Food analysis
Food Control Department
Ministry of the Environment
Environment Building, 19th Floor
40 Scotts Road
Singapore 0922
Telephone: (65) 731-9845
Facsimile: (65) 731-9843

Ministry of Health
16 College Road
College of Medicine Bldg
Singapore 0316
Telephone: (65) 223-7777
Facsimile: (65) 224-1677

Importing Agent
Customs and Excise Department
1 Maritime Square, Room 03-01
World Trade Centre
Singapore 0409
Telephone: (65) 272-4442
Facsimile: (65) 375-2093

Chambers of commerce and industry associations

Asia-Pacific Foundation of Canada
 999 Canada Place, Suite 666
 Vancouver, B.C
 Canada V6C 3E1
 Telephone: (604) 684-5986
 Facsimile: (604) 681-1370

Canada Singapore Business Association
 30 Orange Grove Rd
 #07-00 RELC Building
 Singapore 1025
 Contact: Ms. Elaine Williams,
 Executive Director
 Telephone: (65) 738-9232
 Facsimile: (65) 738-9227

Singapore Federation of Chambers
 of Commerce and Industry
 Chinese Chamber of Commerce Building,
 Suite 03-71
 47 Hill Street, Singapore 0617
 Telephone: (65) 338-9761
 Facsimile: (65) 339-5630

Singapore Importers 'and
 Exporters' Association
 Robinson Road, POB 1931
 Singapore 9038
 Telephone: (65) 535-7844

Singapore International Chamber
 of Commerce, Trade Enquiries
 6 Raffles Quay, Suite 10-01
 John Hancock Tower
 Singapore 0104
 Telephone: (65) 224-1255
 Facsimile: (65) 224-2785

Singapore Retailers Association
 2 Bukit Merah Central,
 Suite 15-03 NPB Building
 Singapore 0315
 Telephone: (65) 272-3160
 Facsimile: (65) 271-3091

Canadian banks in Singapore

Bank of Montreal
 50 Beach Road
 26-01 Gateway West
 Singapore 0718
 Telephone: (65) 296-3233
 Facsimile: (65) 296-5044

Bank of Nova Scotia
 10 Collyer Quay
 15-01/04 Ocean Building
 Singapore 0104
 Telephone: (65) 535-8688
 Facsimile: (65) 532-2440

National Bank of Canada
 331 North Bridge Road
 11-04/06 Odeon Towers
 Singapore 0718
 Telephone: (65) 339-3455
 Facsimile: (65) 339-2866

Royal Bank of Canada
 140 Cecil Street
 01-00 PIL Building
 Singapore 0106
 Telephone: (65) 224-7311
 Facsimile: (65) 224-5635

Canadian Imperial Bank of Commerce
 16 Collyer Quay #04-02
 Singapore 0104
 Telephone: (65) 459-5795
 Facsimile: (65) 533-1229

Toronto Dominion Bank
 65 Chula Street
 25-08 OCBC Centre
 Robinson Road, P.O. Box 2704
 Singapore 0104
 Telephone: (65) 532-5163
 Facsimile: (65) 532-6648

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READER EVALUATION

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by facsimile at (613) 943-8820. Thank you for your valuable input.

1. How did you obtain a copy of this market report?

- InfoCentre FaxLink system Government worldwide web site
- InfoCentre help line InfoCentre bulletin board system
- Local government office Other: _____

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well written	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideal length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. In what form do you prefer to obtain these reports?

- Print Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.

- Seek an agent/distributor Contact Canadian trade office abroad
- Visit the market Participate in a trade show abroad
- Do more research Nothing
- Other: _____

5. What other market reports would be of benefit to your organization? Please identify specific products and countries.

6. Which of the following categories best describes your organization? Check one only.

- Processor/manufacturer Government
- Trading house Student/academia
- Export service provider Consultant
- Industry/trade association Other: _____

7. What were your organization's total sales last year, in Canadian dollars?

- Less than 10 million 10 million to 50 million
- More than 50 million Not applicable

Additional comments/suggestions for improvement: _____

OPTIONAL — The name of your organization is: _____

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