



A Call to Prioritize Singapore's Local Produce and Market Access

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Executive Summary

A recent update to Singapore's 30 by 30 Food Resilience goals with the addition of Global Partnerships sparks a relook on the capabilities of Singapore's independent ability to curate a sustainable Food System. With a recent outcry by local Farmers and in the F&B scene – which signals a review of the support given to local produce and restauraners.

This policy brief focuses on the issue of whether there are sufficient market mechanisms in place to place the local agrifood industry in an optimal position for the creation of food security and resilience in Singapore – or if the current system places imports as a premium, proposing for 4 potential levies:

1. Greater Visibility and Positive Communication of Local Produce in Displays
2. Price Support and Demand Aggregation for Local Produce
3. Fixed market shares for Local Produce
4. Dedicated Channels for Food Waste

With the increasingly unstable global environment and global food crises from effects of climate change, there is an urgency to relook the current system to see where the actual bottlenecks for local farms are present than the repeated though no less important issues to address– expensive rental, high-cost technology, lack of land use space. A wider look at socio-cultural acceptance of local produce, positive communication of alternative proteins that can change perceptions of Singaporeans and a need to encourage preference change for local produce through price-points and availability advocates for these additional levers to ensure no stones are unturned in the journey towards the capacity build for food security locally.

Commentary

In January of 2026, [Justin Foo](#) drew widespread attention online after raising concerns about subsidies for traditional farmers not engaged in R&D. The discussion built on points previously highlighted by Mr. Foo and led to the formation of a policy research group made up of Singaporeans focused on farmer support. Several farmers have since outlined their

operational challenges and proposed alternatives in public forums and consultations. These developments align with prior studies showing substantial public backing for food security, which could bolster confidence in local F&B and farming sectors if translated into actionable policy changes.

At the same time, Singapore's current trajectory relies heavily on agritech - often resource-intensive - and operates in a landscape where relatively few startups can remain viable (Loh, 2024). Coupled with persistent land-use trade-offs in a space-constrained city-state, these conditions suggest a need to reassess whether the current mix of instruments is appropriately matched to Singapore's desired local food-system outcomes, and to clarify the role that different farm models (e.g., technology-intensive versus conventional) are expected to play.

This reassessment is further motivated by a more uncertain external environment. Pandemic-risk estimates indicate an annual probability exceeding 2% (Marini et al., 2021), implying recurrent tail-risk exposure with potential implications for supply chains and trade. The recent strikes on Iran initiated by the US have also reemphasized the increasingly volatile global environment and with Singapore being known as sixth globally as an economy sensitive to rising oil prices – we are also prone to price changes as trade restrictions occur elsewhere in the world (Subhani, 2025). In Southeast Asia, the trade restrictions on Russian fertilisers have already affected crops widely (Enterprise Singapore, 2025). This suggests a case of relooking how Singapore can build local capacity to ensure greater resilience in uncertainty and decrease dependence on imports.

In a more volatile global environment - where climate change is exacerbating food-system disruption - there is renewed urgency to identify the true bottlenecks facing local farms beyond commonly cited constraints such as high rents, costly technology, and limited land. A broader assessment is also required: socio-cultural acceptance of local produce, clearer and more constructive communication around alternative proteins, and interventions that shift consumer preferences through price and availability. Together, these additional levers help ensure that the pathway toward strengthening local food-security capacity leaves no critical gaps unaddressed. This policy brief examines Singapore's historical growth as a nation and of past initiatives, whether current market mechanisms adequately position Singapore's local agrifood industry to contribute meaningfully to food security and resilience, or whether the prevailing system structurally privileges imports. It proposes four potential levies as policy levers.

Current state of Singapore's Food System

Market access refers to the share in which different sellers have in the Singapore Food Market. [Current local shares](#) are approximately 34% for eggs, 3% for vegetables, and 6% for seafood, within a system where Singapore imports more than 90% of its food (SFA, 2025). Local produce refers to any form of food that has been produced in Singapore – including vegetables, eggs, fish and alternative proteins.

Back in 1959 upon self-governance, Singapore had about 20,000 farms and with the Primary production Department, had sought to boost local food production with more efficient processes which led to Singapore being self-sufficient in eggs, pork and poultry (Choo, 2022). As one of the Asian Tiger economies that grew intensively through industrialization and building to become a first-world city– most farmland made way for new housing, buildings for business and even for water security.

Through recent years of initiative from the Ministry of Sustainability and the Environment and the Singapore Food Agency, there has been greater emphasis to build up the local agri-food capacity again learning from a series of global food crises and over-reliance of food imports – where post-2007 led to an increase of 12% of Singapore's food import prices (Rut, 2018). With the establishment of the new Singapore Food Story in November 2025, there was an establishment of the new pillar - Global Partnerships - reflecting efforts to diversify and stabilise supply across regions. While external partnerships support resilience, the domestic question is whether local producers can secure consistent demand and distribution.

Initiatives such as the Hatchery Development Programme and the Farm-to-Table Recognition Programme signal priorities and aim to build capability and adoption for local food, but their direct impact on demand and price alignment [may be limited](#) (Chin, 2025). Given Singapore's heavy reliance on Agritech - which can be resource-intensive and with few startups able to keep afloat (Loh, 2024)- and with trade-offs involved in land use in the limited space, it may be time to reassess the current approach and better determine how local food systems can be supported as we move into the next phase. Shocks to food imports tends to be long-term in nature and a more cohesive approach is required to further tackle food insecurity (Solarin, 2025) in which in this brief, we will focus more on the possible social-cultural bottlenecks or of a larger systemic situation locally.

Singaporeans' Current Perceptions of Local Food Produce and Difficulties

1. Preference to Support Local:

In a recent [YouGov survey](#) conducted just published in 2025, it was found that more than half of the people surveyed prefer local food produce. Survey data suggest a preference for local produce on freshness, hygiene, and safety, but price and variety shape purchasing decisions. A subset reports willingness to support local produce for food-security reasons. Similarly seen in a study conducted by [Nakajima](#) in 2022 from the Lee Kuan Yew School of Public Policy - 90% of the participants have high awareness of climate change and willingness to adopt lifestyle changes among participants, with willingness to pay for local produce varying by income.

2. Bottleneck at Price-points in favor for imports

[Local farms](#) have also mentioned the issue on market share - with over 90% of food still being imported, there are some farms who are still operating below capacity due to lack of demand (Lok, 2025). [I.F.F.J.](#) also closed their mega indoor farm in 2024, after filing for insolvency. [Survey evidence](#) similarly indicates that lower prices and wider selection drive consumers toward imports (Tan, 2024). With local farms and alternative protein establishments perhaps having difficulty in operating [maximum capacity](#), it means that they can produce and grow further (Lok, 2025).

A local perceptions poll also indicates that lower prices and wider selection drive consumers toward imports (Tan, 2024). Price is a definite factor - with the willingness to purchase local produce that could be more expensive being cohesive with the individual's income (Nakajima, 2022).

Under high rental costs and rapidly shifting consumer preferences, [F&B operators](#) may prioritise lower-cost inputs over local sourcing, limiting scope to pay premiums or reconfigure supply chains (Lok, 2025).

3. The Need for Positive Communication

Positive communication proves to be an integral factor to influence preference for local produce, other than cost. In the YouGov survey conducted in June 2024 based on 842 Singaporeans, the top 2 most popular reasons to locals' preference to support local is the 'freshness' of local produce and the 'assurance of food safety'. In comparison, those who prefer imports are mostly drawn due to the cost of the food. About 65-82% of the participants who were not purchasing local produce currently have also indicated that they will be more likely to purchase if local produce has 'more information' and 'more prominent displays of local produce in supermarkets'. Perception, information and

accessibility are also major factors shaping Singaporean consumer choices (Nakajima, 2022).

Acceptance for alternative proteins is still a challenge. Meatable, one of the largest locally backed alternative protein company has just announced their [insolvency in 2026](#). In a [recently published study](#) by Tan (2025) on the perception of cultivated meat and plant-based foods in Singapore, food technology neophobia is still one of the most integral blockages to acceptance for such food. The study successfully found the correlation to after tasting exposure and information providence – which led to a positive acceptance by participants. They compared studies in the UK which found similar results – whereby with public information intervention for alternative proteins leads to ‘boosted awareness and confidence’.

Case Study: South Korea’s Food Security Index and Circular Food System

Recently in October of 2025, the Korean Ministry of Agriculture, Food and Rural Affairs also commissioned a study for "Development of a Food Security Index for rerouting food self-sufficiency goals." They are intending to use this to analyse the stability of supply chain, stockpile levels and climate response which will be transparent and indicative for the public to work together.

Despite the difference in land-size – which would prove for Korea to be at a greater advantage as compared to size-constrained Singapore, both countries face similar structural vulnerabilities –on the tangent of urbanisation focus, with accelerated aging population of rural areas which have also led to limited agricultural land and high dependence on food imports – making them vulnerable to global price and supply shocks. They also have one of the highest rates of food waste per capita with about 130kg of food waste each year per person (World Economic Forum, 2019). With a GFSI score of 70.2 (World Population Review, 2026), the land area required for self-sufficiency is at 493% which indicates a risk of food security with reliance on food imports. It has been indicated that the self-sufficiency rate is at 49.3% which is one of the lowest of the Organization for Economic Cooperation and Development (OECD). These parallels make Korea’s policy tools - particularly its move toward a multi-dimensional food security index and operational food-waste reduction systems - relevant for assessing which instruments could be adapted to Singapore’s context.

As a strategic partner for Singapore – with multi-sector MOUs signed with South Korea last November (Ng, 2025), we could perhaps look at which ways the two countries can further collaborate. Perhaps this could be a cross-

cutting learning example for Singapore evaluate as an option to create a more subjective index of actual self-sufficiency to Singapore's environment and standards. Though, it is to be acknowledged that previous ratings can also be unreliable since they had a greater emphasis on food stability – which Singapore had ranked first due to securing food imports. There is a need to include other factors to be inclusive of Singaporeans' diet, import and production capacities as well as climate conditions – which we can learn from Korea where they will develop the index through 5 factors of: availability, access, stability, nutrition, and environment (Kim, 2025). A curated food index based on Singapore's context could be relevant to create indicators of importance for Singapore's landscape.

We can also learn from South Korea's Food Waste system - which has successfully reduced annual levels of food waste to 2%. They implement strict policies and regulations on disposal of waste – with dedicated waste bins and gradual reduction and accessibility to general waste bins to channel and encourage proper disposal methods. Incentive programs with smart bins also helped reduce food waste in the city by 47000 tonnes in 6 years.

Recommendations

Evidence and learnings points to four potential levers:

1. Information and display standards

Improvements to the labeling and visibility of local produce at retail and in menus can reduce search and acceptability frictions. Presently, the [Singapore Food Agency](#) have initiated the SG Food Story and with labels for SG Fresh produce – through terms of 'locally grown', 'GAP certified' and 'GAP, C&G certified'. They also showcase stories from the local farmers that evoke greater association with the local community. However, a study by Pereira and Talib in 2023 has found that Singaporeans have a high tendency to misunderstanding food labels, whereby only 15.6% of Singaporeans that were surveyed were able to provide the accurate understanding of food labels in the NIP (Nutrition Information Panel) and 21.7% for the HCS (Healthier Choice Symbol) labels posed in the research. The study showed that although a high number of Singaporeans view food labels as important, they tend to have a wrong understanding of it. This indicates a gap between reading labels and lack of understanding towards food terminologies due to the lack of cohesiveness of labelling, which tends to be different.

Limited nutritional information is also currently available for some agri-tech and alternative protein products, which may benefit from clearer communication and greater public exposure to support informed consumer choice and demand. As mentioned in the study done by Tan et. Al in 2025, Singaporeans requires a change in perception of alternative proteins and thus positive communications should be encouraged and made accessible to boost local consumer demand to help the burgeoning alternative protein and technological companies growing in the landscape.

2. Price support and demand aggregation

Time-bound, targeted subsidies for local produce can be done to start local appetite and demand. Although there are [present grants and plans](#) to support marketing expenses and for pre, post-harvest facilities to build farms to be financially sustainable in the long run, it might not be targeting the exact root issue of market share and price points that are already placing local produce at a disadvantage. With the consistent support by the European Union via the European Agricultural Guarantee for local farmers in the EU, subsidising farming costs with a budget of \$291.09 billion thus far since 2021, Singaporean farmers are at a disadvantage.

Currently, despite previous demand-supply initiative announced by Singapore Agro-Food Enterprises Federation Limited, whereby the non-profit organisation with At Fresh and Seafood Industries Association Singapore were made under the agreement to aggregate, process and distribute supplies (Lee, 2024), there are still continued issues with market share and price points that plagues preferences for local produce in Singapore. It may be useful to review existing initiatives to identify potential bottlenecks and lessons learned, and to engage a broader network of local farmers and supply chain operators.

Bulk purchasing frameworks can be initiated for F&B groups who could align price and volume, subject to cost-benefit evaluation, to be more affordable than imports for a certain time and build demand and preferences. An analysis of restaurant and local preference for certain import varieties can be done – to see the actual market demand for higher-priced imports and possible supplies that can be grown locally.

3. Capacity signaling and market-share pilots

Transparent reporting on local availability and small-scale pilots allocating fixed shares in specific categories (e.g., eggs) could test feasibility without distorting markets. Farmers are hesitant to increase capacity and output without secured future demand. A long-term goal of market share for local produce should be established and supported - with mentorship for business sustainability and costs if necessary.

Any measure should include safeguards against unintended effects (e.g., cost pass-throughs, reduced variety) and be evaluated with clear metrics.

4. Tackling Food Waste through greater redistribution and recycling initiatives

A paper by Bajzelj in 2020 states that the reduction of food waste is essential for long-term food system resilience. Singapore generates roughly 800,000 tonnes of food waste annually. The presence of excess waste signals the inefficiency of the current food system where there is over-production, which results in redundancy. There are government and private initiatives to tackle the issues – with public campaigns and food redistribution channels like the Good Samaritan Food Donation Act and even private tech initiatives like Yindii and Treatsure - platforms where restaurants and bakeries price and list surplus food every day for consumers to purchase and be avoided as food waste. Initiatives are met with very positive statistics with SGD\$1.5 million of food loss avoided and helping F&B businesses clear about 75-99% of surplus food directly on the app (Yahoo, 2025). These examples are initiatives for behavioural interventions to incentivise the purchase of leftovers to lower wastage.

However, as the average of food waste generated per year has not reduced by much, in fact, increased from 2020 to 2024 (National Environmental Agency, 2026), this suggests that underlying drivers of food waste may not yet have been fully addressed. Smaller actors like smallholder farmers, suppliers and restaurateurs are unable to predict and understand the consequences of over-supply which comes at an expense of long-term resilience (Bajzelj, 2020). A recent study by The Food Bank Singapore (2026) has also found that despite 146 food charities and community groups in Singapore, – they face issues of the lack of storage facilities, manpower shortages as well as transportation issues, which leads to greater food wastage in the tropical climate. There are also issues with volunteer retention and funding which leads to operational ineffectiveness.

Perhaps alternatively, with learnings from South Korea, there can also be dedicated channels for food waste that can be directly channeled for animal feed, compost, and even bioenergy. There can be stricter restrictive policies to the ban of dumping food in landfills or disposal outside of food waste biodegradable bags – which can be channeled for fertiliser supply and animal feed. Similarly, research has also suggested that demand forecasting could be done to foresee changes to contracts or a better understanding of yields to improve the stability of output and reduce redundancy (Bajzelj, 2020).

The need for stimulation

As Singapore moves toward net zero, reducing the carbon footprint associated with heavy import dependence could be a crucial first step for a nation that relies on imports for about 90% of its food. Climate change is already disrupting farms and livestock production worldwide, and growing global uncertainty makes it more urgent to strengthen local capacity - before external support or supply conditions shift against us. Lessons from COVID-19 and 2007, pandemics and global financial crises have taught us of the long-term impacts of import over-reliance. Rather than prioritising imports, we should focus on ensuring a resilient local supply of essential foods such as vegetables and protein to sustain the population and safeguard food security.

Other than the issues of rental costs, import competition and trade-offs with land use, a takeaway is perhaps also to have a relook at the socio-cultural influences impacting consumer preferences which also induces demand for local produce – could there be more that can be done to support preferences for local produce and alternative proteins? This is an opportune time to reassess our local food system and consider whether current incentives sufficiently support local capacity building.

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